



# WORKSHEET



# BRAND IMPACT ASSESSMENT WORKSHEET

**Congratulations** on taking steps to learning more about the effectiveness of your brand strategy and execution.

The following assessment will ask you to rate your brand's effectiveness across five categories:

**WHO YOU ARE**

**BRAND STYLE**

**BRAND DEPTH**

**SHARING YOUR STORY**

**EXPANDING YOUR VISION**

Each of these five categories will ask you specific questions relating to your brand.

**Take your time – and be honest with yourself.**



# WHO YOU ARE:

## SCORING

4 = ABSOLUTELY 2 = SOMEWHAT 0 = NOT AT ALL

	4	3	2	1	0
Have you positioned what you are best at?					
Is what you are “best at” different or better than your competitors?					
Does your brand align with your strengths and best opportunities?					
Have you clearly communicated the value of your uniqueness?					
Have you defined your ideal audience(s)?					
Does your message resonate with your ideal audience(s)?					
Do you have a strategy in place to build your brand and get results?					
<b>SCORE</b>					
Score divided by 28 = PERCENT					

# BENEFITS:

## A COMPELLING BRAND WILL:

### Clarify whom you work with.

When you know whom you prefer to work with you can target your marketing and sales. Targeted marketing will resonate more with your ideal prospects. You’ll attract and engage more prospects who think you get them and who think you are different or better. You will also save time not having to meet with unqualified prospects.

### Help you get more and better referrals.

Clients want to know who you work best with before they make introductions. When they trust your marketing they’ll refer more.

### Enhance your return on marketing and networking.

Networking and marketing are about getting your message out there. When you’re message is intriguing, you get more opportunities to sell. Branding improves your results.

### Improve Your Focus

Branding breeds clarity which in turn breeds focus. When you know who you are, who you best serve and why you are different or better, it’s easier to get excited about growing your business. It also inspires your entire team and client base to feel the same way.



# BRAND STYLE:

## SCORING

4 = ABSOLUTELY 2 = SOMEWHAT 0 = NOT AT ALL

4 3 2 1 0

Do you have a defined style including fonts, a color palette, and graphics guidelines?

Does your logo brilliantly reflect your professionalism and core message?

Does everything you share/market adhere to your defined brand style?

Do you have defined design elements that are part of every marketing (i.e. LG uses red circles from their logo in every marketing piece)

Does your style reflect your company and client's personality?

SCORE

Score divided by 20 = PERCENT

4	3	2	1	0

# BENEFITS:

## MAKES YOUR BRAND APPEALING AND MEMORABLE.

When you know whom you prefer to work with you can target your marketing and sales. Every brand has a style. It's represented by their color palette, fonts, words, design, media choices, imagery and more. Consistency of style speaks volumes about your professionalism and commitment. Every interaction people have with your brand tells your story and determines how believable or trustworthy it is.



# BRAND DEPTH:

## SCORING

4 = ABSOLUTELY 2 = SOMEWHAT 0 = NOT AT ALL

	4	3	2	1	0
Does your current marketing tell your story well?					
Does your website stay away from jargon and copy-heavy pages?					
Do you regularly share high-value client centric content on your website/blog?					
Do you package your expertise in your marketing? (i.e. whitepapers, presentations, video)					
Do you have a clearly defined and diagrammed financial or investment planning process?					
Is your content original, i.e. written by you or someone in your firm?					
Do your social profiles accurately portray your brand?					
Does your website play an active role in your marketing?					
<b>SCORE</b>					
Score divided by 32 = PERCENT					

# BENEFITS:

### Accelerates building trust and credibility.

Trust is unequivocally the best strategy to attract investors who want to work with you. These days, Investors don't automatically trust the Internet, financial marketing (cookie-cutter websites that all say the same thing) and/or you, a financial professional. To establish trust your marketing needs depth; it needs to prove your brand is real, that you are the expert(s) you claim.

### Gets you to YES faster and for longer.

When prospects trust your marketing, they're more apt to trust you. Trust gets you more time with prospects talking about what matters, their finances versus your background, abilities and focus. Trust helps you turn prospects into clients with less effort, less buyer remorse and sets the table for a long relationship.



# SHARING YOUR STORY:

## SCORING

4 = ABSOLUTELY 2 = SOMEWHAT 0 = NOT AT ALL

	4	3	2	1	0
Do you utilize at least two of the following digital marketing tools? (email marketing, social media marketing, search engine optimization, online advertising, webinar marketing)					
Does your website engage ideal prospects – do you collect email addresses?					
Do you consistently add new contacts to your entire digital network? (i.e. someone who downloads paper on your website gets invited to LinkedIn)					
Do you leverage an automated online marketing system? (i.e. when someone downloads a paper, they automatically start receiving follow up emails)					
Do you add new client content at least once a month?					
Do you provide updates via your social networks at least daily?					
Are you currently receiving online leads that you are converting to ideal clients?					
Do you have a plan to attract and influence ideal prospects?					
Is your plan sustainable by your current team? (bandwidth and expertise)					
Do you track, measure and analyze your online marketing efforts? (i.e. Google Analytics, Customized Reporting)					
<b>SCORE</b>					
Score divided by 40 = PERCENT					

## BENEFITS:

### Fill your prospect pipeline.

Getting your message out there is the essence of marketing – attracting opportunities and closing new business. Sharing your story in the right places, with the right content and the right call-to-action will fill your pipeline. The trick is finding the right places, the right frequency and the right approach.

### Influence prospects to want to work with you.

Once people know you exist they need to know you're the real deal. A good marketing strategy gets you in front of prospects over and over again. A great marketing strategy gets you in front of people who chose to be there because they enjoy your wisdom and ideas. Influencing prospects is a huge benefit of sharing your story.



# EXPANDING YOUR VISION:

## SCORING

4 = ABSOLUTELY 2 = SOMEWHAT 0 = NOT AT ALL

	5	4	3	2	1
Does your marketing reflect your vision for your business?					
Does your marketing keep pace with your business direction and opportunities?					
Is your marketing leveraging the true value of the opportunities in front of you?					
Does your firm see marketing as an investment in profitability and sustainability rather than simply a cost of doing business?					
Is your firm great at building your marketing?					
Is your firm great at implementing your marketing?					
Is your vision for your business clear?					
<b>SCORE</b>					
Score divided by 28 = PERCENT					

## BENEFITS:

**If you're not expanding you're dying.**

It's critical to always be challenging what you do, why you do it, whom you do it for and how you plan to share that story to grow your business.

## SUMMARY SCORING:

Section	SCORE	PERCENT	OVERALL PERCENT
Who You Are			<b>0 - 25</b> <b>POOR</b> - Time to roll up your sleeves
Brand Style			
Brand Depth			<b>26 - 50</b> <b>GOOD</b> - Not bad, but lets make it better
Sharing Your Story			
Expanding Your Vision			<b>51 - 75</b> <b>VERY GOOD</b> - Nicely done, keep going.
TOTAL SCORE			
Total Score divided by 148 = OVERALL PERCENT			<b>76 - 100</b> <b>EXCELLENT</b> - Great Work

There are tons of free resources to help you within each of the Brand Impact categories available at [TopAdvisorMarketing.com](http://TopAdvisorMarketing.com)