

# From Brand Basics to Marketing Momentum

Checklist



A Guide to **Branding & Marketing** Your Insurance Business

## 1.) Laying the Foundation

- Understand why first impressions matter
- Design a clean, modern, and memorable logo
- Choose a consistent color palette, typography, and brand tone
- Craft a clear mission statement and value proposition
- Build trust by maintaining brand consistency across all channels

## 2.) Creating Your Digital Home

- Treat your website like your storefront—make it clean and user-friendly
- Clearly list your services and value proposition
- Focus on social media platforms that matter to your audience
- Post with purpose—prioritize value over volume
- Keep branding consistent across all digital platforms

## 3.) Making It Personal

- Build your email list the right way
- Set up a welcome and nurture series
- Send monthly newsletters
- Share testimonials and stories

## 4.) Thinking Outside the Box

- Use branded items (coasters, pens, magnets)
- Host or sponsor local events
- Create engaging print handouts
- Position yourself as the go-to local agent

## 5.) Reputation is Everything

- Ask for reviews the right way
- Use platforms like Yelp, Google, and Facebook
- Monitor your online reputation regularly
- Leverage reviews to boost search and trust