

# Brand Rollout Checklist

A series of lists, questions, and tips to help plan the rollout of your rebrand or new brand launch



**You've spent months developing a brand strategy and designing an identity. Now what? Ideally, flawless execution and launch (with a little rah rah thrown in).**

**This document contains tactical checklists and thought starters to get you rolling on your own launch plan.**

# Elements of a successful launch plan

A successful launch should be built around clear goals, focused strategy, and coordinated execution. Consider the following in your rollout planning:

## 1. **Communications**

Identify who needs to know what, when, how.

## 2. **Conversion & Creation**

Inventory and prioritize touchpoints to execute.

## 3. **Stewardship**

Manage and nurture your brand over time.



*If you need help developing your brand strategy or identity, use our DIY Brand Blueprint (or just hire us!).*

1. Comms

2. Conversion

3. Stewardship

## Plan your **launch communications** by mapping messages and tactics for different audiences.

A few questions to ask:

1. What audiences will we address?
2. What are our communication goals for each audience?
3. What are the key messages for each audience?
4. What are the best channels and tactics to meet our goals?
5. What is the timing (and how do communications overlay with other launch activities)?



*Still untangling your messaging?  
Learn more about calibrating brand messaging for a complex business.*

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### EXAMPLE AUDIENCE CHECKLIST:

#### INTERNAL:

- ✓ CUSTOMER FACING (SALES, SUPPORT, ETC)
- ✓ MARKETING TEAM
- ✓ CONTENT CREATORS
- ✓ LEADERSHIP
- ✓ AMBASSADORS
- ✓ ASSOCIATES / STAFF
- ✓ FIELD / CREW

#### EXTERNAL:

- ✓ CLIENTS / CUSTOMERS
- ✓ PROSPECTS
- ✓ INVESTORS
- ✓ INFLUENCERS
- ✓ PRESS
- ✓ AGENCY PARTNERS
- ✓ VENDORS / PARTNERS

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LAUNCH PLANNING: **COMMUNICATIONS** | CONVERSION | STEWARDSHIP

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### EXAMPLE GOALS CHECKLIST:

- ✓ AWARENESS/ UNDERSTANDING
- ✓ EXCITEMENT
- ✓ PEACE OF MIND
- ✓ PARTICIPATION
- ✓ BEHAVIOR CHANGE

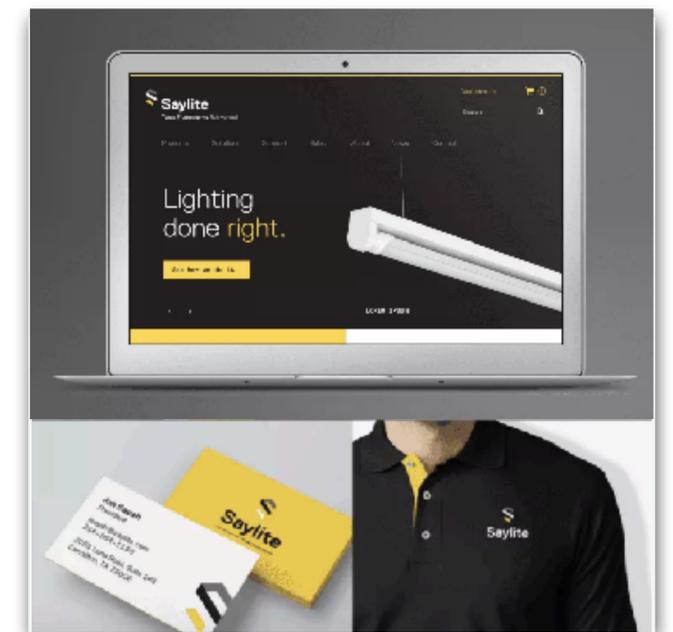
(THESE ARE HIGH-LEVEL EXAMPLES; MAKE GOALS AS SPECIFIC/MEASURABLE AS POSSIBLE.)

1. Comms
2. Conversion
3. Stewardship

A new (or newly revised) brand comes with **converting materials** and/or creating items from scratch.

A few questions to ask:

1. If it's a new brand: what items need to be created?  
If it's a rebrand: what items need to be converted to the new branding?
2. Should all materials be converted prior to launch?  
Will it flip all at once like a light switch, or roll out over time? Which are most urgent?
3. What resources will be needed to convert and deploy new/revised assets? (Dollars, people, etc)
4. What challenges may trip us up?



*A full company rebrand may involve converting hundreds (or more) marketing and sales materials.*

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**EXAMPLE CONVERSION CHECKLIST:**

- ✓ MARKETING & ADVERTISING MATERIALS
- ✓ VIDEOS
- ✓ TRADE SHOW MATERIALS
- ✓ SWAG
- ✓ WEBSITE
- ✓ SOCIAL MEDIA PAGES & PROFILES
- ✓ BUSINESS DOCUMENTS (TEMPLATES, BIZ CARDS, HR MATERIALS, ETC)
- ✓ INTRANET & BUSINESS SOFTWARE/SYSTEMS
- ✓ VOICEMAIL GREETING
- ✓ SHIPPING PACKAGING
- ✓ SIGNAGE
- ✓ VEHICLES
- ✓ UNIFORMS & APPAREL
- ✓ EMAIL TEMPLATES AND AUTOMATED REPLIES

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4. **What challenges may trip us up?**

**EXAMPLE CHALLENGE CHECKLIST:**

- ✓ LIMITED BUDGET OR PERSONNEL BANDWIDTH
- ✓ LACK OF ALIGNMENT OR BUY-IN FROM KEY STAKEHOLDERS
- ✓ LOGISTICAL OR LEGAL HURDLES
- ✓ EXTERNAL FACTORS LIKE COMPETITION OR ONGOING DISRUPTION
- ✓ NEW PRODUCTS, SERVICES, CAPABILITIES NOT READY IN TIME
- ✓ DECISIONS REVERSED AFTER THE FACT

1. Comms
2. Conversion
3. Stewardship

Build **brand stewardship** into your plan, considering how to stay up to date in marketing, sales, and culture.

A few questions to ask:

1. Who “owns” brand management moving forward?
2. Are our new brand guidelines clear and comprehensive?
3. Who needs to be educated and trained on the new brand expression?
4. How (and how often) will we monitor brand perception and expression post launch?



*Brand stewardship is the clear and consistent presentation of your brand over time. [Read more](#) about why this matters and how to do it for B2B.*

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EXAMPLE EDUCATION & TRAINING MATERIALS CHECKLIST:

- ✓ SALES PLAYBOOK
- ✓ NEW CONTENT PROTOTYPES
- ✓ VIDEOS TUTORIALS
- ✓ ROLE PLAYING AND OTHER EXERCISES
- ✓ LIVE TRAINING AND WORKSHOPPING
- ✓ NEW SALES TOOL DEMOS
- ✓ ONLINE MODULES
- ✓ FAQ SHEETS
- ✓ “TRAIN THE TRAINERS” ACTIVITIES / MATERIALS

# Launch planning thought starters

## Things to consider as you get rolling:

- How will you define success? What metrics will you use?
- Is this a hard or soft launch? Aiming for big bang impact or slow roll efficiency? Will it happen in phases? Do you have time to do this right and make the most of it?
- Is the brand strategy ready to go? Have you worked out architecture, positioning, persona, messaging? Is brand identity finalized, are brand guidelines in place?
- Are resources in place to fuel a successful launch? Is leadership aligned and on board?
- Do your people understand and support this launch? Do they need to be informed, educated, persuaded, excited? How will we contact, equip and train employees?
- How can this succeed beyond the roll out and launch?



*Bluegreen offers free resources to help work through many of these questions.*

**Need more help? We offer custom workshops and brand strategy engagements for ambitious marketing leaders. If that's you, drop us a line.**

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