

Value messaging activation checklist.

You've created your value messaging. Now it's time to put your new messaging to work. Use this planning tool and checklist to ensure you are consistently communicating your value across your business.

TO UPDATE	NOTES		OWNER	STATUS
Website	Homepage	Visitors know the who, what, why, and how in 10 seconds.		
	About us	Ensure how you talk about the firm and yourselves (bios) reflect your key messages.		
	Services	Showcase all of your services, don't hide services behind a label like "wealth management" or "comprehensive planning" (using a visual summary can help)		
	Other pages	Don't forget your footer, contact page, client portal, etc.		
Social media profiles	Corporate	Update all channels: LinkedIn, Facebook, Instagram, Twitter, YouTube, TikTok, etc.		
	Personal	If used for business purposes		
Marketing content	List your content to update...			
	Newsletters			
	Boilerplate			
	Prospecting materials			
	Client materials			
Your team	Share and train your team on the Value Messaging Framework. Practice and role play help.			
Professional partners	Make a point to iterate (or reiterate) your value messaging in EVERY conversation. You're training them to know your who, what, why, and how so well they become advocates.			
Clients	Remind clients daily why you do what you do and for whom to plant referral seeds.			
Conversations	Practice talking about yourself. Social selling and referrals are a powerful source of growth.			



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