Brand Conversion Checklist

iX Implementix®

For Banking/Financial Services Industry

This checklist is tailored to identify the most important items for the banking/financial services industry. Please be sure to take a look at our "Brand Conversion Checklist" for all industries for additional items.

Branch/Facility Signage

> Take this opportunity to increase your brand exposure; don't just automatically replace the existing signage; assess competitor signage in area.

- Building signs (e.g., channel letter signs)
- Pylon signs
- Monument signs
- Doors
- Windows
- Lobby and other interior signs
- Digital sign displays
- Way-finding (particularly for drive-up and drive-through banking areas)

Customer Banking Items

> Communicate the benefits of the brand change to your customers while changing these items

- Customer statements (e.g., checking, savings, investments, loans)
- Customer checks and deposit slips
- Customer credit and debit cards
- Applications (e.g., new account, loans, mortgages)
- ATM and transaction receipts

Branded Technology

> Coordination with your IT team is critical as customers rely heavily on your branded technology sites.

- Internet banking site
- Mobile banking apps
- Telephone banking system
- Voicemail messages
- Email signatures and templates
- Company website and landing pages

Legal and Regulatory

> We have found different notices and regulatory postings at different locations – take this opportunity to standardize your regulatory communication notices and postings in coordination with your legal department.

- Contracts
- Regulatory notices and postings

Equipment

> ATMs and kiosks are a great way to increase brand exposure – these are very often underutilized from a branding standpoint.

- ATMs
- Mobile banking centers
- Kiosks
- Entryway rugs/carpets
- Offsite signage (e.g., yard signs)

Promotional/Sales Items

- Posters
- Brochures or sales literature
- Flyers
- Giveaways (e.g., pens, mugs, hats, shirts, memory sticks, coasters, keychains, bags)
- Point-of-sale items
- Displays
- Branded display holders and racks
- Community award displays

Advertising Items

- Print advertising in newspapers or magazines
- Internet advertising (e.g., Google, Bing, Yahoo)
- Social media sites (e.g., Facebook, Linkedin)
- Radio and television ads
- Online directories (particularly local community directories)
- Trade show items (e.g, banners, booths)

Employee Items

- Clothing (e.g., shirts, jackets, hats)
- Name tags
- Security badges
- Employee manuals
- HR materials

Office Supplies

- Business cards
- Letterhead
- Fax cover pages
- Memos
- Envelopes
- Mailing labels
- Thank-you cards
- Folders
- Note pads
- Mousepads
- Pens