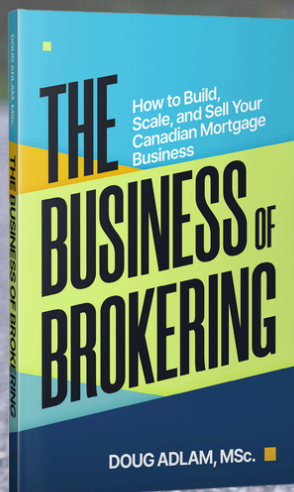




Chapter 5 – Worksheet

Branding — *Because No One is Irreplaceable*

Purpose: Use this worksheet to clarify positioning, choose your brand architecture, and operationalize the brand across touchpoints.



Free Resource: Competitive Positioning Worksheet (download from your site).



1) Brand Clarity Snapshot

a) What do I want to be known for in 3–5 years? (One sentence)

b) The problem I solve best (for whom, in what situations):

c) Proof I can deliver (evidence, credentials, outcomes):

2) Brand Architecture Selector (Personal / Team / Enterprise)

Check your current and target state, then note implications.

| Model | Current? (Y/N) | Target? (Y/N) | Implications (hiring, governance, marketing) |
|---------------------------------|----------------|---------------|--|
| Personal (name-driven) | | | |
| Team (collective brand) | | | |
| Enterprise (umbrella brokerage) | | | |

3) Positioning Statement Builder

Use this template, then refine to a tight, memorable line.

For [ideal client/audience] who [urgent need], we [promise/result] by [distinct approach]. Unlike [alternatives], we [unique proof/differentiator].





4) Compete on What? (Choose 1 primary, 1 secondary)

5) Ideal Client Profile (ICP)

Who is your ideal client?





6) Value Proposition & Proof Library

List proof assets that substantiate your promise (case studies, testimonials, ratings, awards, stats).

7) Brand Touchpoint Audit

- ☐ Website (clarity, differentiation, speed, trust signals)
- ☐ Email signature (clean, consistent, compliant)
- ☐ Voicemail greeting (warm, confident, helpful)
- ☐ Intake & onboarding (organized, guided, branded)
- ☐ Follow-up cadences (renewals, anniversaries, referrals)
- ☐ Templates (email/SMS) reflect tone & values
- ☐ Social profiles (bio, highlights, proof) aligned
- ☐ WOW moments defined & empowered (budget, triggers)
- ☐ Review pipeline (ask → capture → publish → reuse)
- ☐ Compliance & privacy cues visible (trust by design)

8) Referral & Review Engine

Who will champion us (Realtors, planners, lawyers)?



9) Anti-Commoditization Plan

If a competitor undercuts on rate or speed, how do we defend with value & proof?



10) Brand Asset Inventory (Create/Update)

- ☐ One-liner & positioning statement
- ☐ About story (client-centric)
- ☐ Case studies (3)
- ☐ Testimonials library & usage rights
- ☐ Photography/headshots (team + clients where allowed)
- ☐ Sales deck & proposal template
- ☐ Email/SMS templates (tone-aligned)
- ☐ Website (offer clarity, proof, CTA)
- ☐ Onboarding guide & client portal content

Owner & timeline for missing assets:

Note: Brand is built in action. Start with clarity, then make it visible and consistent across every touchpoint.

