



Steps to Developing a Strong Personal Brand

Step 1 – Determine your key traits.

Write down your passions, things you value, and all of the words that you feel describe you. What are you good at? What are you consistently praised for? Try to get 10-20 words. Do not edit at this point – simply write down all the words or phrases that come to you.

- | | |
|-----------|-----------|
| 1. _____ | 11. _____ |
| 2. _____ | 12. _____ |
| 3. _____ | 13. _____ |
| 4. _____ | 14. _____ |
| 5. _____ | 15. _____ |
| 6. _____ | 16. _____ |
| 7. _____ | 17. _____ |
| 8. _____ | 18. _____ |
| 9. _____ | 19. _____ |
| 10. _____ | 20. _____ |

Step 2 – Repeat this process with others

Ask others to describe you and write down words or traits that come to mind when thinking of you. Try not to point them in any direction as we’re just looking for all the words that come to mind.

Step 3 – Look for Related Words and Phrases

Take all of the lists and begin looking for 6-8 words that are related. Typically you’ll see a trend develop. Highlight or circle those words.

- | | |
|----------|----------|
| 1. _____ | 5. _____ |
| 2. _____ | 6. _____ |
| 3. _____ | 7. _____ |
| 4. _____ | 8. _____ |

Step 4 – Pare down the list

Take some time to examine the 6-8 words and think about what is really most important to you both personally and professionally. It’s best to have no more than 2-3 (maybe 4) things that you want to focus on or that define you as a financial professional.

- | | |
|----------|----------|
| 1. _____ | 3. _____ |
| 2. _____ | 4. _____ |

Step 5 – Develop (show) your Brand!

Everything you do should reinforce your brand. The way you run your practice, talk to people, write your emails should all be on brand. Then, take it a step further and examine your website – is it on brand? Begin honing your brand on social media so that it’s visible to current and potential clients who you are.

Refer to the DBS Social Media Guide for tips on getting started in social media!