

Your Rebrand Planning Checklist

A practical checklist to help you plan, organise and deliver a successful rebrand.

Work through each section, tick off what's relevant, and use it to keep your project on track.

Define The Purpose Of Your Rebrand

- Define the objectives behind the rebrand
- Agree what is changing and what is staying the same
- Identify the audiences the new brand needs to reach
- Consider how you want employees, customers and stakeholders to experience the new brand
- Establish your budget
- Agree key dates, including internal rollout and external launch
- Identify the people responsible for key decisions and approvals
- Decide how the success of the rebrand will be measured

Identify Everyone Who Needs To Be Involved

- Identify the departments affected by the rebrand
- Consider HR for onboarding, employee communications and engagement
- If applicable, speak to Internal Communications
- Involve Facilities where signage, buildings, workwear or physical environments are affected
- Speak to Events teams
- Consider Health and Safety requirements
- Involve CSR/sustainability teams where sourcing and environmental commitments are concerned
- Identify requirements from regional offices, branches or multiple sites

Audit Your Existing Brand Touchpoints

- Website and digital platforms
- Social media profiles
- Email signatures and templates
- Presentations and sales materials
- Internal documents and communications
- Office and building signage
- Exhibition and event materials
- Employee uniforms and workwear
- Name badges and lanyards
- Stationery and office products
- Onboarding and welcome packs
- Customer and stakeholder gifts
- Promotional merchandise
- Packaging and delivery materials
- Existing online ordering portals or merchandise stores

Review Existing Branded Stock

- Identify all existing branded stock
- Record quantities and where stock is currently held
- Identify products that will become obsolete
- Decide if existing stock can be used pre launch
- Identify opportunities to repurpose or responsibly dispose of redundant stock
- Factor remaining stock into your purchasing plans for the new brand
- Set a cut off date for old branding

Plan Your New Branded Merchandise

- Identify which audiences need merchandise
- Define what you want it to achieve
- Consider employee launch and engagement
- Plan onboarding merchandise
- Identify customer and stakeholder needs
- Review upcoming campaigns and events
- Consider different departments or locations
- Establish quantities and budgets
- Review quality, suitability and sustainability
- Agree branding methods and positioning
- Request samples
- Allow time for production and delivery



Create Clear Brand And Artwork Controls

- Finalise brand guidelines before production
- Confirm approved logos, colours and artwork files
- Agree how the brand should appear on products
- Create pre-approved artwork where products will be reordered regularly
- Establish an approved core merchandise range if appropriate
- Decide who can approve new products or designs
- Create a clear process for exceptions or bespoke requirements
- Make approved assets easily accessible to the people who need them

Plan How Merchandise Will Be Stored And Distributed

- Identify every location requiring merchandise
- Confirm quantities required by each site or team
- Decide if delivery will be in bulk or individually
- Consider requirements for remote employees
- Decide where ongoing stock will be stored
- Establish who will monitor stock levels
- Consider whether external stockholding and fulfilment would reduce internal administration
- Plan how orders and deliveries will be tracked
- Build delivery requirements into the launch plan
- Allow contingency time for any challenges

Decide How Teams Will Order After Launch

- Identify which products will need to be reordered
- Decide who should be able to place orders
- Agree appropriate spending or ordering permissions
- Decide which requests need central approval
- Consider whether an online merchandise shop would simplify ordering
- Create pre-approved ranges to maintain brand consistency
- Consider different permission levels for departments, locations or users
- Decide how stock availability and orders will be monitored

Prepare For Launch

- Confirm final artwork approvals
- Confirm production and delivery dates
- Check quantities against final requirements
- Confirm delivery addresses and contacts
- Coordinate merchandise with internal and external launch activity
- Brief departments and locations on the changes
- Communicate how employees can access or order new merchandise
- Confirm when old branded materials should stop being used
- Track deliveries and resolve outstanding requirements
- Keep contingency stock available where appropriate

Plan For Life After The Rebrand

- Review stock levels after the initial rollout
- Gather feedback from teams and locations
- Identify products that are being used and reordered
- Review products that have not performed as expected
- Check that old branding has been removed
- Monitor consistency across departments and locations
- Review ordering permissions and processes
- Plan for future starters, campaigns, events and seasonal requirements
- Review your merchandise range periodically rather than allowing it to grow unnecessarily
- Keep your merchandise partner informed about future plans

