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Rebrand cut-over timeline

For the documents your company sends: offers, order confirmations, datasheets, declarations, reports and letters. Work back from the day the new brand goes public, and write the date next to each step.

WHEN	DATE	WHAT	WHO	DONE
8 weeks before		Inventory finished from sent mail; an owner for each document type; retirements decided	Owner of the whole set	
6 weeks before		New design approved for each document type, tested on real content	Brand owner, document owners	
4 weeks before		ERP and other system layouts briefed. The longest lead time: it depends on an outside party	ERP partner, IT	
2 weeks before		Distributors told what changes, with the list of current revisions	Sales, product management	
Cut-over day		New masters live; old masters moved to "retired"; files on the website replaced under the same addresses	Owner of the whole set, web team	
2 weeks after		Last ten sent attachments of three people checked for the old brand	Document owners	
3 months after		Ten-document self-audit run again	Owner of the whole set	

Before cut-over day, test every new template on

- the longest customer name and address you have;
- the longest table: an offer with the most lines, a datasheet with the full specification;
- every language and both paper sizes you use;
- the first page and the pages after it.

Not on this list, but on someone's

Email signatures, slide decks, labels, packaging and pre-printed stationery. Give each one an owner too.

Checklist: prettypdfprinter.com/guides/rebrand-documents. Self-audit: prettypdfprinter.com/self-audit. Inventory sheet: prettypdfprinter.com/downloads/document-inventory-sheet.xlsx.