



## Advanced Strategies for Using LinkedIn

Social Selling for  
Financial Professionals





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## Enhance Your Social Selling Efforts

You may be online already, adding new connections and sharing content with your network. The following pages include advanced strategies for each aspect of social selling to help you widen your client base.

These strategies are focused on LinkedIn, the network of choice for 90% of financial advisors who use social media.<sup>2</sup>



Nearly one-third of financial advisors who have used LinkedIn have gained \$1 million or more in assets under management—and more than one in 10 have gained \$5 million or more.<sup>1</sup>

For financial professionals, building a business has always been about networking and meeting new people. It should come as no surprise that social selling, the strategy of using social media to help deepen relationships with existing clients and prospect for new ones, has quickly gone from early adoption to mainstream use in the financial community.

There are four key aspects to an effective social selling strategy:

1	CREATE Your Presence
2	BUILD Your Network
3	KNOW Your Clients
4	ESTABLISH Your Expertise

*Be sure you are aware of any compliance rules that your firm may have regarding the use of social media and social media networks.*

<sup>1</sup>Emily Friedman and Neil Benedict. "Financial Advisors' Use of Social Media Moves from Early Adoption to Mainstream." LinkedIn and FTI Consulting, May 2012.

<sup>2</sup>Trevor Turnbull. "Why Financial Advisors Can't Afford To Ignore LinkedIn." LinkedIn, April 10, 2014.



# I. Create Your Presence

## Make Your Profile Stand Out



Improve your chances of being found when others search.

With more and more financial professionals using LinkedIn, making your profile stand out is important. It helps others find you when they search LinkedIn or use search engines. Consider the ideas below to help optimize your LinkedIn profile and differentiate it from others in your industry.

- **Complete your entire profile.** The more information you provide, the easier it will be for investors to find you as they search words like “financial professional,” “investments,” “retirement,” and more.
- **Embed keywords in job titles.** For example, if you’re seeking clients in your local area, instead of “financial professional,” consider “financial professional in Houston, TX.”
- **Optimize job descriptions.** Job descriptions in LinkedIn should be descriptive, but don’t be afraid to add a bit of creativity to make them stand out. Include words a client would use to search for someone matching your qualifications; it increases the frequency of your profile appearing in searches.
- **Maximize your group memberships.** Each time you join a group, the group’s name is automatically included in your profile and can be picked up by search engines.



See the [How to Make Your LinkedIn Profile Stand Out](#) guide.

## Market Your Profile



Increase connection opportunities outside of LinkedIn or search engines.

In addition to being easy to find, you should promote your profile—an important component in your personal brand. Create your LinkedIn custom URL and engage in multimedia marketing to help increase connection opportunities outside of LinkedIn or search engines.

- **Select a custom URL.** Every LinkedIn profile has its own URL (hyperlink)—and LinkedIn provides a way to customize yours. Consider changing your URL so that it helps someone identify you and can be easily remembered. Then, include your custom URL in your e-mail signature, on your business cards, or even on the final slide of a presentation.
- **Engage in multimedia marketing.** There are many forms of communication that can be used to invite people to view your profile. If you have an existing website or blog, include a LinkedIn logo with a hyperlink that points back to your profile. If you’re participating in a TV or radio interview, invite listeners to connect with you on LinkedIn. When you host a seminar or webinar, include a slide with your LinkedIn URL and the words “Connect with me on LinkedIn.”



See the [How to Claim Your Custom URL on LinkedIn](#) guide.

## 2. Build Your Network

### Use the Search Functions



Use this powerful tool for your advanced prospecting efforts.

LinkedIn offers advanced search functionality that can be a powerful tool for your prospecting efforts. Take a few moments to identify characteristics of your target audience. With Advanced People Search, you can easily find clients by:

- Current and/or past job titles
- Employer(s)
- Industry
- Geographic area (including defining a radius around your postal code)

When you use the Advanced People Search function, it may take some trial and error to determine the best combination of words and filters to find target prospects that fit your business. However, when you identify the right criteria:

- **Save the search.** LinkedIn allows you to save your search query. This enables you to quickly rerun the same search at a later date for updated results.
- **Sign up for automatic search alerts.** LinkedIn will send you weekly or monthly e-mails anytime a new LinkedIn member matches your criteria.



See the [\*\*How to Use Search Functions on LinkedIn\*\*](#) guide.



## THE POWER OF A SEARCH

### POTENTIAL PROSPECTS



#### MONEY IN MOTION

Identify potential opportunities.



#### CENTERS OF INFLUENCE

Broaden your referral network.



#### HIGH NET WORTH

Uncover these individuals near you.



#### FORMER ALUMNI

Search for ideal alumni prospects.

### HOW TO FIND THEM

Use  
**ADVANCED SEARCH**

Use  
**ADVANCED SEARCH**

Use  
**ADVANCED SEARCH**

Use  
**FIND ALUMNI**

### SEARCH KEY WORDS

"New Opportunity"  
"New Position"  
"Career Change"  
"Looking For"

"CPA"  
"Accountant"  
"Lawyer"  
"Estate Attorney"

"CEO"  
"EVP"  
"General Counsel"  
"President"

Review their employers, titles, age (graduation dates), and geographic locations.

### FOCUS YOUR SEARCH

Narrow the search by LinkedIn relationship type (e.g., first or second connections) and geographic location.

Filter by location to identify professionals who can lead you to new clients or help you address unmet client needs.

Narrow the list by industry, company, or location and then focus second- and third-degree connections.

Narrow the list by the characteristic that provides the top prospecting opportunity for you.

### RESULT: TARGETED PROSPECTING LISTS

Local professionals who are changing jobs that you know or where there is a warm introduction opportunity.

Local professionals in complementary businesses where it may be mutually beneficial to exchange referrals.

Senior executives and highly-paid professionals in your area, who you know or who you can be introduced to through a LinkedIn referral.

Business owners in your area, of a specific age, who share a common experience with you.

*Save your successful searches and schedule a weekly or monthly alert. LinkedIn will automatically run the search for you and send new results matching your criteria.*



## REFERRALS

Introductions may increase your chances of connecting with someone new.

## Acquire New Connections through Referrals

LinkedIn members may be more willing to connect with you if someone they know introduces you. The **Get Introduced** feature in LinkedIn expedites this process by giving you the ability to reach out to individuals in your network and request introductions. When using the feature, follow these rules:

- **State your intent.** Be clear about why you're asking for an introduction.
- **Provide options.** Give the person who will be making the introduction a gracious way to decline if he/she doesn't feel comfortable recommending you.
- **Be professional.** Your referral connection request might be seen by the person with whom you want to connect.



See the [\*\*How to Use LinkedIn Introductions for Referral Connections\*\*](#) guide.

### GENERIC

Dear Mary,  
Can you introduce me to one of your connections, Thomas Jones?  
Thanks,  
Chris

Personalizing referral requests increases the probability of getting positive responses.

### PERSONALIZED

Dear Mary,  
I'm writing to ask if you would be willing to make an introduction on my behalf. It looks like you are connected to Thomas Jones, CEO of Morgan Sciences. He and I both attended UCLA, and even though he graduated a few years before me, we know many of the same people. It would be great to connect with another Bruin living in Houston.  
If you are open to making an introduction, I would really appreciate it. However, I would also understand if it is not a good time. Please let me know your thoughts.  
Best regards,  
Chris

### 3. Know Your Clients



Joining groups can optimize your profile.

#### Gather Client Insights

Social media allows you to gather all types of information about your connections that you can use to your benefit. Social signals, for instance, are significant life events that represent an opportunity for you to engage with your contacts. It may be as simple as saying happy birthday or congratulations on a new job. There are many different mobile applications (apps) that can help you keep track of those insights and social signals.



See the **Tool Spotlight: Mobile Apps to Help Maximize Social Selling Efforts** guide.

*While client insights may create a competitive advantage, the advantage doesn't come from merely gathering the information, it's how you use it that can make the difference. Participating in relevant social dialogue can help you understand your clients better and set you apart from the competition.*

#### Join LinkedIn Groups

You can join up to a maximum of 50 groups to help optimize your profile and stay aware of relevant conversations taking place within your network. Sign up for group alerts so you can quickly skim new posts and replies to your comments.



See the **How to Join LinkedIn Groups and Sign Up for Notifications** guide.

*You can quickly follow companies when viewing an individual's profile by hovering over a company listed in his/her experience section. If that company has a LinkedIn page, you can click Follow in the box that appears.*

## 4. Establish Your Expertise



Valuable content helps build your credibility.

### Post the Right Message at the Right Time

For your content to be successful and keep you top of mind, it's important to post valuable content regularly and at the times your clients will most likely see it.

- **Follow the 80/20 rule.** 80% of your content should be helpful and useful to your audience, while 20% should promote your brand and business offerings.
- **Post three to five times per week just before or after normal working hours.** Most people check their LinkedIn feeds during these times.

You don't need to be online all the time to keep your posting consistent. Use a content marketing platform to schedule content for the week or month ahead, and track the effectiveness of the content you are posting. This can be a useful way to keep your activity feed active and save time by not actively posting content every day.



See the [Tool Spotlight: Content Marketing Platforms](#) guide.

### Use LinkedIn's Publishing Platform

LinkedIn has a feature that allows you to publish long-form posts hosted on LinkedIn that can help you publicize your expertise. This is equivalent to having your own blog that is featured on your profile and can be seen and shared by anyone.



See the [How to Use the Publishing Platform on LinkedIn](#) guide.

## A Word about Compliance

Of course, as with any form of communication, it's important to know the compliance guidelines your firm has regarding social selling and social networking sites. Know the guidelines and coordinate closely with your firm. Keep in mind that the regulatory landscape continues to change as the financial services industry adapts to newer forms of technology.

## Pacific Life Is Ready to Help

At Pacific Life, we work with financial professionals who are using social selling successfully to create deeper client relationships and grow their businesses. In fact, our consultative wholesalers actively use LinkedIn to communicate, interact, and share valuable information with their connections.





{ Learn more by visiting  
SocialSelling.PacificLife.com. }

Learn more about how social selling can position you for referrals,  
enhance client relationships, and build your online brand.

Call your consultative wholesaler at  
(800) 722-2333 or visit [SocialSelling.PacificLife.com](http://SocialSelling.PacificLife.com).

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