



Search Strategies to Identify Prospects on LinkedIn

Social Selling for Financial Professionals



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.

In many ways, using the LinkedIn network complements the way you already build and manage your practice. Knowing how to effectively search on LinkedIn can save you countless hours, making your prospecting efforts more efficient. And, you can save your searches to make it easy to find similar prospects later.



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Money in Motion

Use this search strategy to prospect for local professionals who may be changing jobs. These may be individuals you already know or people to whom your contacts might be willing to introduce you.

Search Tool

Advanced

Keywords

Think of keywords that people may add to their profiles that match your target criteria. Enter these into the **Keywords** field. Examples:

- “New Opportunity”
- “New Position”
- “Career Change”
- “Looking For”

Narrow Your Search

Location

Choose **Located in or near** for the **Location** field, enter your **Postal Code**, and then choose your **Within** radius.

Relationship

Select the **Relationship** levels you want to see in the results.

Automate

After you have successfully created a search that matches your criteria, save the search by clicking **Save Search** in the top-right corner. You can schedule a weekly or monthly alert, and LinkedIn will automatically e-mail you new prospects that meet this criteria.



Centers of Influence

Use this search strategy when you want to find local professionals in complementary businesses, such as lawyers or accountants, who may find it mutually beneficial to exchange referrals.

Search Tool

Advanced > People



Keywords

Think of keywords that represent appropriate titles and enter these into the **Keywords** field. Examples:

- “CPA”
- “Accountant”
- “Lawyer”
- “Estate Attorney”

Narrow Your Search

Location

Choose **Located in or near** for the **Location** field, enter your **Postal Code**, and then choose your **Within** radius.

The screenshot shows the 'Location' section of the LinkedIn search interface. A text input field contains the postal code '92660'. To its right is a 'Lookup' button. Below the input field is a dropdown menu labeled 'Within' with the following options: '10 mi (15km)', '25 mi (40 km)', '35 mi (55 km)', '50 mi (80 km)' (which is highlighted in blue), '75 mi (120 km)', and '100 mi (160 km)'. A small 'mi' unit indicator is also present.

Relationship

Select the **Relationship** levels you want to see in the results.

The screenshot shows the 'Relationship' section of the LinkedIn search interface. It includes four checkboxes:

- 1st Connections
- 2nd Connections
- Group Members
- 3rd + Everyone Else

Automate

After you have successfully created a search that matches your criteria, save the search by clicking **Save Search** in the top-right corner. You can schedule a weekly or monthly alert, and LinkedIn will automatically e-mail you new prospects that meet this criteria.



High Net Worth

Use this search strategy when you want to prospect for senior executives and highly paid professionals in your area who you know or to whom you can be introduced through a LinkedIn referral.

Search Tool

Advanced > People



Keywords

Think of keywords that represent a person's function and seniority. Enter these into the **Keywords** field. Examples:

- “CEO”
- “EVP”
- “General Counsel”
- “President”

Narrow Your Search

Location

Choose **Located in or near** for the **Location** field, enter your **Postal Code**, and then choose your **Within** radius.

The screenshot shows the LinkedIn search interface. In the 'Postal Code' field, '92660' is entered. Below it, a 'Lookup' button is visible. Under the 'Within' section, a dropdown menu shows distance options: '10 mi (15km)', '25 mi (40 km)', '35 mi (55 km)', '50 mi (80 km)' (which is selected), '75 mi (120 km)', and '100 mi (160 km)'. The background of the interface shows blurred company names like 'Pacific Life'.

Industry & Company

Select one or more **Industries** and/or enter a specific company.

The screenshot shows the LinkedIn search interface. Under the 'Industry' section, several checkboxes are listed: Accounting, Airlines/Aviation, Alternative Dispute Resolution, Alternative Medicine, Animation, and others. Below that, under 'Company', 'Pacific Life' is selected. A small 'x' icon is visible next to the company name.

Relationship

Select the **Relationship** levels you want to see in the result.

The screenshot shows the LinkedIn search interface. Under the 'Relationship' section, four checkboxes are shown: '1st Connections' (unchecked), '2nd Connections' (checked), 'Group Members' (checked), and '3rd + Everyone Else' (checked). The background shows blurred company names.

Automate

After you have successfully created a search that matches your criteria, save the search by clicking **Save Search** in the top-right corner. You can schedule a weekly or monthly alert, and LinkedIn will automatically e-mail you new prospects that meet this criteria.

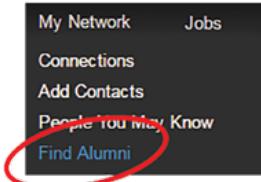


By Age Range

Use this search strategy when you want to find prospects within a specific age range.

Search Tool

My Network > Find Alumni



Set Parameters

Select your targeted university from the **Change University** drop-down list.

Use the **Attended** or **Graduated** fields to target a specific age or age range.

Examples:

- If you want to locate 65-year-olds, subtract the average graduate age (22) from 65.
 - Then subtract the result, 43, from the current year.
 - If the current year is 2016, this would result in 1973.
- Use the **Attended Range** as 1972–1974.

Narrow Your Search

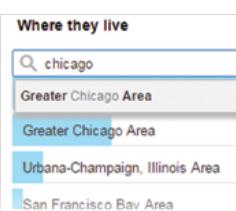
Profession

Enter keywords in the **Search** field to find specific professions.



Location

Click the search icon next to **Where they live** to target a major metropolitan area.



Skills

Click the search icon next to **What they're skilled at** to focus on specific skill sets.



Review Results

After you have narrowed your search, you will see the results below. Clicking any person results in a pop-up that includes a quick snapshot with relevant information. Use the arrows on either side to scroll through your results and connect with anyone that fits your client profile.

Additional Resources

A Quick-Start Guide for Using LinkedIn

In many ways, using the LinkedIn network complements the way you already build and manage your practice. This comprehensive guide will teach you the essentials to get started on LinkedIn quickly and effectively.



Advanced Strategies for Using LinkedIn

You may already use LinkedIn and have a solid understanding of the basics. This guide will show you how to take your prospecting searches on the LinkedIn network even further with advanced strategies to help you grow your client base.



A Word about Compliance

Of course, as with any form of communication, it's important to know your firm's compliance guidelines regarding social selling and social networking sites. 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 about how social selling can help you identify quality prospects, position you for referrals, and enhance client relationships.

Call your consultative wholesaler at
(800) 722-2333, or download additional resources at
DiscoverSocialSelling.com.

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