



# Build Your Social Media Skills Using LinkedIn

## A Guide for Financial Professionals\*

\*In order to sell life insurance, a financial professional must be a properly licensed and appointed life insurance producer.

# 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.

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:

**\$3**

**MILLION  
OR MORE  
IN ASSETS**

51% of financial professionals are finding new clients from using social media and increasing their assets under management by an average of \$3.8 million.<sup>1</sup>

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

<sup>1</sup> Source: [Putnam Social Advisor Survey](#), February 2023. A total of 1,043 U.S. financial advisors who have been advising retail clients for more than 2 years were surveyed. Survey conducted online from October 2022 to January 2023.

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



# I CREATE YOUR PRESENCE



## STAND OUT

Improve your chances of being found when others search.



## PROMOTE YOUR PROFILE

Increase connection opportunities outside of LinkedIn or search engines.

## Make Your Profile Stand Out

With more and more financial professionals using LinkedIn, it's important to make your profile stand out. Here are four easy ways to improve your profile.

- 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. 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. Each time you join a group, the group's name is automatically included in your profile and can be picked up by search engines. Once you join a group, sign up for group alerts so you can quickly skim new posts and replies to your comments.

## Market Your Profile

In addition to being easy to find, you should promote your profile—an important component in your personal brand.

- Customize your profile Uniform Resource Locator (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. 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 television 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.”



### PEOPLE SEARCH

Use this powerful tool for your advanced prospecting efforts.

## Use the Search Functions

LinkedIn's free search function (found at the top navigational bar on the home page) provides filters to help you create a finely tuned prospecting list.

**Use filters and keywords** - You may filter by company, location, role, and more. Once you land on the right combination of keywords and filters, save your list by keeping a word document of the URLs of the searches you'd like to return to.

**Consider LinkedIn Sales Navigator** - An optional premium service, LinkedIn Sales Navigator Tool, allows you to InMail prospects outside your network, allows for advanced lead searches, and sends automated alerts anytime a new LinkedIn member matches your search criteria.



# 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  
LINKEDIN SALES  
NAVIGATOR

Use  
LINKEDIN SALES  
NAVIGATOR

Use  
LINKEDIN SALES  
NAVIGATOR

Use  
VISIT ALUMNI TAB  
under School  
LinkedIn Page

## SEARCH KEY WORDS

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

“Certified Professional Accountant”  
“Accountant”  
“Lawyer”  
“Estate Attorney”

“Chief Executive Officer”  
“Executive Vice President”  
“General Counsel”  
“President”

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

## FOCUS ON 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.

## 2 BUILD YOUR NETWORK *(continued)*



### REFERRALS

Introductions may increase your chances of connecting with someone new.

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.

Personalizing referral requests increases the probability of getting positive responses.

#### GENERIC

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

#### 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 ESTABLISH YOUR EXPERTISE



### SHARING

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. Eighty percent of your content should be helpful and useful to your audience, while 20% should promote your brand and business offerings.
- Post two to three 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.

### 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.

## 4 KNOW YOUR CLIENTS



### JOIN GROUPS

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.

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.

**To see more resources on Social Media please visit:  
[www.lifeinsurance.pacificlife.com/social](http://www.lifeinsurance.pacificlife.com/social)**

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Newport Beach, CA  
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