

Sales, Distribution & Technology

Social Selling

How to Prospect and Generate Leads with LinkedIn

Ayla Anderson

Senior Director, Moore Communications Group



15th Annual Intercompany Long Term Care Insurance Conference

VIDEO

<https://www.youtube.com/watch?v=zxp4dNVd3c>

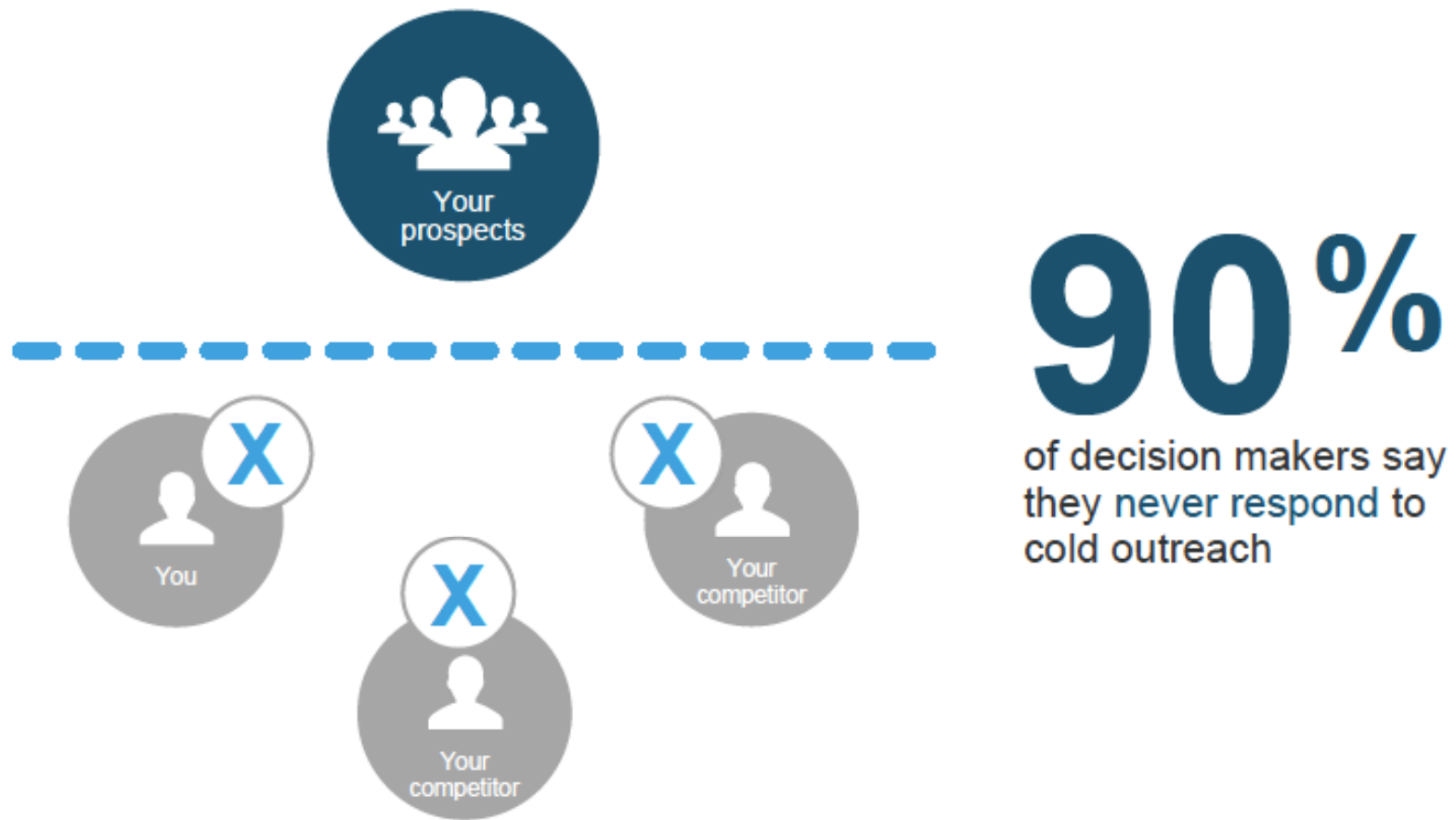
“**Social media** uses web-based technologies to transform and broadcast media monologues into social media dialogues.”

- www.wikipedia.org



- The Tradeshow
- Business related networking
- Connect with everyone
- Share articles, blogs, surveys, best practices
- Interact – ask & answer questions
- Follow people, companies, organizations
- Join groups

FACT: Decision makers now ignore cold outreach



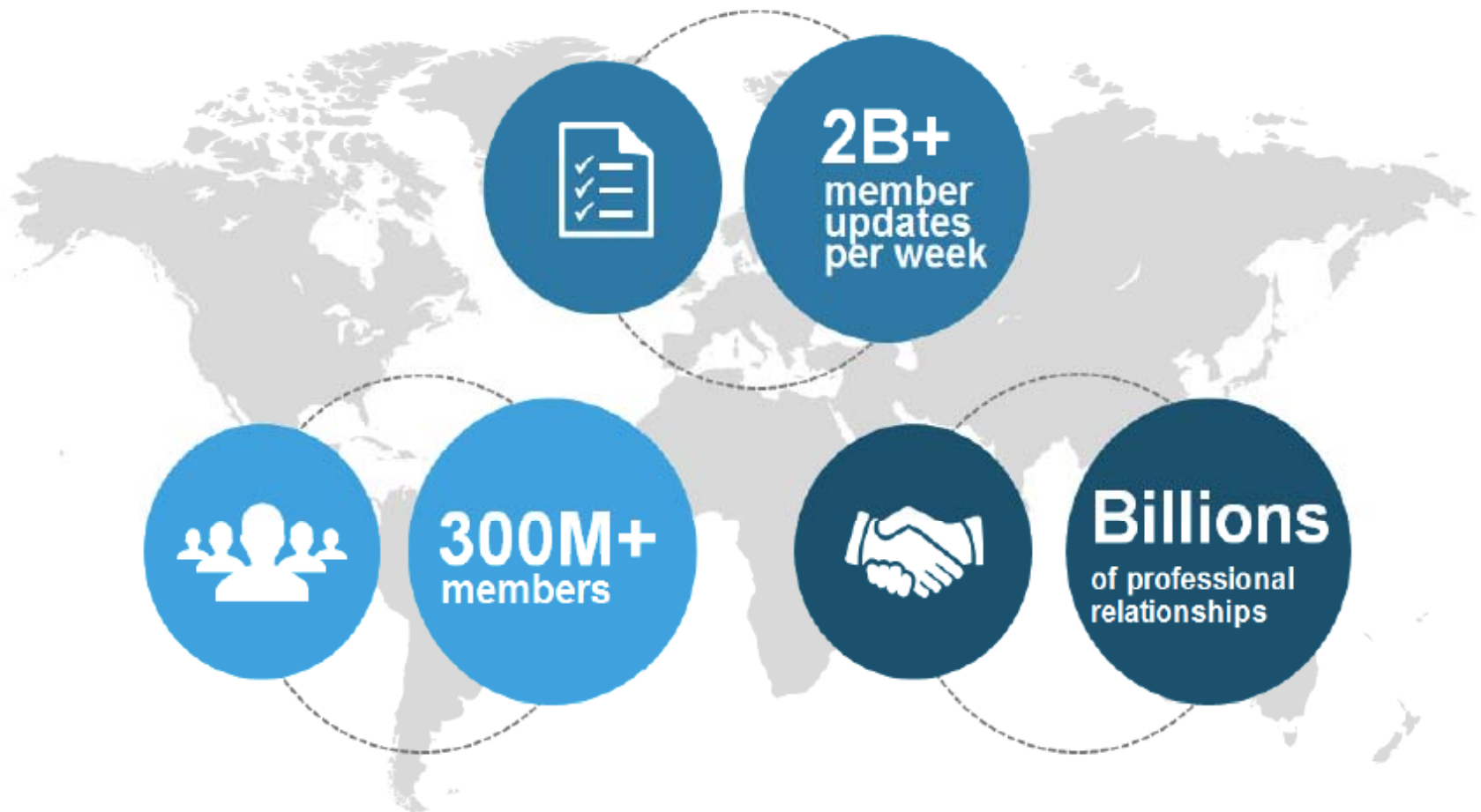
FACT: Your target audience relies on social media when determining their needs from a financial institution



75%

of buyers now use social media to conduct research

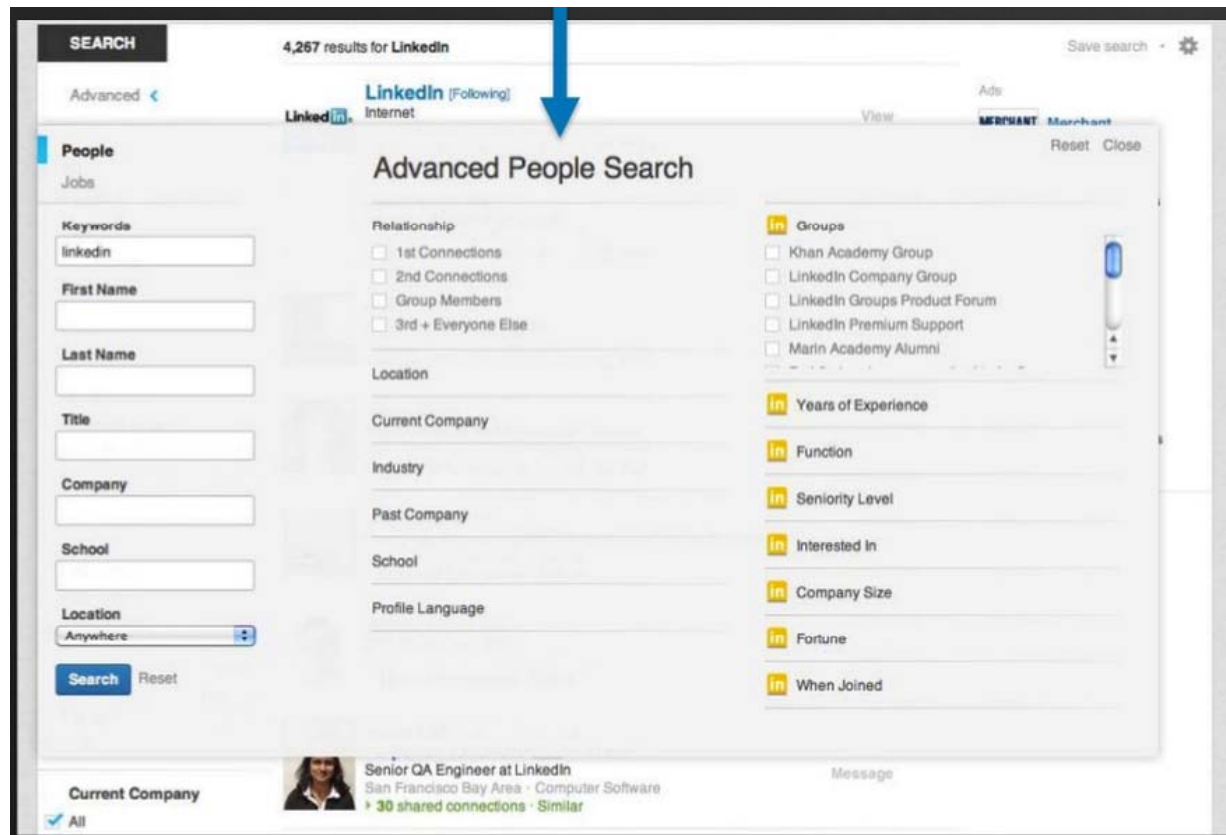
LinkedIn has a wealth of information on the people & companies with whom you want to build relationships.



Search Optimization



LinkedIn is a powerful search engine



Search for “Long Term Care Denver”



People
Jobs

Keywords
insurance agent

First Name

Last Name

Title

Company


School


Location Company
Located in or near:

Country
United States


Postal Code
80205




12,251 results for **long term care denver**

 **Paulette Ditemore** 2nd
Long Term Care Planning Consultant
Greater Denver Area • Insurance
[13 shared connections](#) • [Similar](#)

 **Hadley Carmichael** 2nd
Senior Vice President- American Health and Financial Services
Greater Denver Area • Insurance
[7 shared connections](#) • [Similar](#)

Current: Senior Vice President at American Health and Financial Services
...specializes in index and fixed annuities, **long term care**... work with **Long Term Care Resources**, the largest...

 **597 Jobs results for long term care denver**

-  **Total Care Services Specialist**
Strategic Products and Services (SPS)
-  **Financial Advisor - Rocky Mountain Division Office**
Mutual of Omaha
-  **Denver Financial Representative**
First Investors Corporation

Tips to Optimize Your Profile



Create a Custom URL

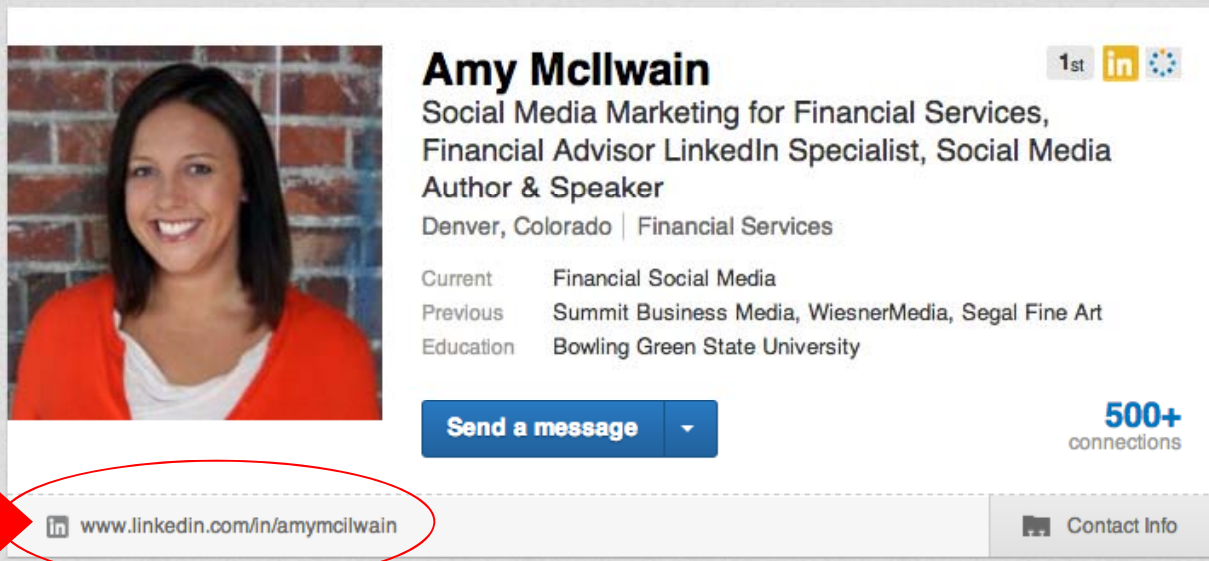




Before:

 www.linkedin.com/pub/amy-mcilwai/679923/0267331

After:

 www.linkedin.com/in/amymcilwain



Amy McIlwain 1st  


Social Media Marketing for Financial Services,
Financial Advisor LinkedIn Specialist, Social Media
Author & Speaker

Denver, Colorado | Financial Services

Current Financial Social Media
Previous Summit Business Media, WiesnerMedia, Segal Fine Art
Education Bowling Green State University

[Send a message](#)

500+
connections

 www.linkedin.com/in/amymcilwain [Contact Info](#)

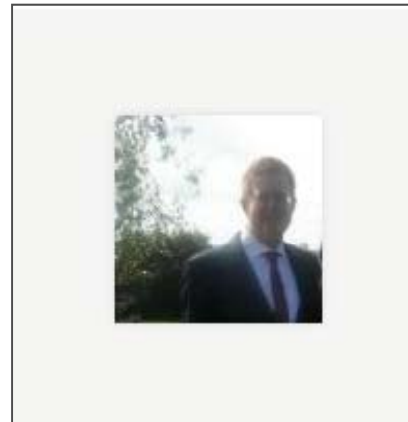
Upload Your Profile Picture



DO!



DON'T



PhotoFeeler



USE
Company Website
TITLE
VP Digital & Social Strategy



USE
LinkedIn Profile
TITLE
VP Digital & Social Strategy

Scores **PhotoFeeler Rank** Notes (3)

ABOUT THESE RANKS

Competent

61%



Likable

62%



Influential

67%



Scores **PhotoFeeler Rank** Notes (4)

ABOUT THESE RANKS

Competent

85%



Likable

94%



Influential

94%



Complete your contact info



★ Relationship	📁 Contact Info	
Email	janderson@seic.com	Phone 610-676-2174 (Work)
Birthday	10/15	
🌐 Website	www.linkedin.com/in/seijohna	
	SEI Advisor Network	
	Practice Management Blog	
	What's Your Simplicity Score?	

Maximize Anchor Links



Wayne von Borstel, CLU, ChFC, CFP®, MSFS 2nd
Certified Financial Planner® | Chartered Financial Consultant | President of von Borstel & Associates, Inc.
Portland, Oregon Area | Financial Services

Current von Borstel & Associates, Inc., Oregon Trail Financial Services
Previous dimentional funds, Matson Money, LPL Financial
Education The American College

[Connect](#) [Send InMail](#) 500+ connections

[Websites](#) [Learn About von Borstel](#)
["Like" us on Facebook](#)
[Check out my blog](#)

www.linkedin.com/in/waynevonborstel

[Websites](#) [Learn About von Borstel](#)
["Like" us on Facebook](#)
[Check out my blog](#)

Link to the company page



The screenshot shows the LinkedIn profile page for Capital Investment Counsel, Inc. The page header includes the LinkedIn logo, the word "PREMIUM", a search bar with the text "Search for people, jobs, companies, and more...", and notification icons for 518 messages and 8 alerts. The profile name is "Capital Investment Counsel" with 42 followers and a "Following" button. The main content area features the company logo, name, and tagline "Capital Ideas!". Below this is contact information: phone numbers for CO (303) 329-9000 and AZ (480) 609-0255, the Twitter handle @CICInvestments, and the website www.cicinvestments.com. The bio states: "With over \$2 billion in assets under management, Capital Investment Counsel brings considerable strength to bear on behalf of our clients. We are true wealth advisors, offering unparalleled personal financial service, objective investment guidance, and keen insight to assist clients with every aspect of their financial life." Another paragraph mentions offices in Denver, Colorado and Scottsdale, Arizona, and describes the firm as one of the largest wealth management firms in the area. A "Specialties" section lists "Financial Services, Investment Strategies, Wealth Management, Retirement Planning". On the right sidebar, the "How You're Connected" section shows 1 first-degree connection, 18 second-degree connections, and 31 employees on LinkedIn. Below this is a Mercedes-Benz advertisement for a 2015 C-Class car with the text "Recommend Someone" and "Your colleague could win a 2-year lease on an all-new 2015 C-Class."

A keyword is a search term someone uses to find your profile.

- Create a list of keywords that people may use when searching for you or someone in your field
- Use a combination of short- and long-tail keywords, for example: “retirement” or “financial advisor”
- Weave your keywords into your current job titles, past job titles, personal summary

Examples of Keywords



SEARCH

Advanced >

All
People
More...

Keywords

First Name



Last Name

Title


Company


School


21,107 results for **annuities specialist**


 **Bill Hammond**  1st
College Funding Consultant | F...
President & CEO at Family Wea...
Tampa/St. Petersburg, Florida A...
8 shared connections · Simila...
Summary: After graduating in the top 10%...
annuities, IRA's & IRA...
Current: Strategic Financial Planner | Pe...


 **Ken Nuss** 1st
Fixed-Rate **Annuities Specialist** | CEO & Founder at AnnuityAdvantage.com
Medford, Oregon Area · Financ...
10 shared connections · Simi...

 **Jeffrey Cutter, CPA, PFS**
President, Cutter Financial Gro...
Greater Boston Area · Financia...
8 shared connections · Simila...
Current: Personal Financial **Specialist** (P...


 **Michael Evans, CFP, CFP®**
Certified Financial Planner® | C...
Retirement Planning **Specialist** | C...
Tyler, Texas Area · Investment...
7 shared connections · Simila...

 **Ken Nuss** 1st
Fixed-Rate **Annuities Specialist** | CEO & Founder at AnnuityAdvantage.com
Medford, Oregon Area | Financial Services
Current AnnuityAdvantage.com
Previous Edward Jones
Education Southern Oregon University
Send a message
127 connections

 Experience



Fixed, Equity-Indexed & Immediate Income Annuity Specialist | Retirement Planning Strategist | CEO
AnnuityAdvantage.com
1999 – Present (14 years)



Investment Management Strategist | Financial Services Specialist | Investment Representative

Not All Keywords Are Equal



Headline > Title > Summary >

Amy McIlwain
Social Media Marketing for Financial Services, Financial Advisor LinkedIn Specialist, Social Media Author & Speaker
Denver, Colorado | Financial Services
HEADLINE

Current: Financial Social Media
Previous: Summit Business Media, WiesnerMedia, Segal Fine Art
Education: Bowling Green State University

500+ connections

www.linkedin.com/in/amymcilwain

Contact Info

Summary

As digital native, I began my career in interactive media over 15 years ago in the wild west of online marketing. I've spent the past 8 years in the financial services industry driving sales and market growth through digital media while navigating compliance and risk management.

I'm passionate about social media and love sharing my knowledge with others. I speak at events around the world ranging from audiences of 1000 to small executive boardrooms. I've appeared on FOX, CBS, ABC, and NBC as a social media expert and my book, The Social Advisor: Social Media Secrets of the Financial Industry, has been featured as a best-seller in the Amazon business category.

Skills & Expertise

Most endorsed for...

- 99+ Social Media Marketing
- 99+ Online Marketing
- 99+ Email Marketing
- 99+ Marketing
- 99+ Social Media
- 72 Digital Marketing

Experience

President at Financial Social Media
Financial Social Media
June 2010 – Present (11 yrs 3 months) | Greater Denver Area
TITLE

At Financial Social Media we specialize in compliant social media strategies for financial service companies. By utilizing social networking sites and tools like LinkedIn, Twitter, Facebook, and others, we teach financial advisors, insurance agents, and financial service companies how to combine Social Media, Online Marketing and traditional marketing techniques to build their reputation online, get closer to customers and increase sales.

FINANCIAL SOCIAL MEDIA

Create powerful headline



- Include Keywords
- Describe what you do
- Leverage the real estate
- DON'T just list your current title

Jan Durlacher, CLTC

2nd

Certified Long Term Care Planning Specialist, Dave Ramsey Endorsed Local Provider for Long Term Care Insurance

Greater Philadelphia Area | Financial Services

Joe Lucey, CFP®

1st

CFP®, Social Security & Retirement Planning Specialist, Investment & Financial Advisor | Radio Show Host

Greater Minneapolis-St. Paul Area | Financial Services

- 1) About YOU...tell a story
- 2) What you do in your role
- 3) What your company does



- Introduction video
- How to videos
- Breaking news
- Reports
- TV appearances
- Slideshare presentation

Dynamic Content



Summary

As digital native, I began my career in interactive media over 15 years ago in the wild west of online marketing. I've spent the past 8 years in the financial services industry driving sales and market growth through digital media while navigating compliance and risk management.

I'm passionate about social media and love sharing my knowledge with the world ranging from audiences of 1000 to small executive ABC, and NBC as a social media expert and my book, The Financial Industry, has been featured as a best-seller in the

At Financial Social Media I work with financial advisors, in companies to create and implement social media strategies, marketing expenses and improve customer service. By utilizing LinkedIn, Twitter, Facebook and others we have developed results.



Financial Social Media provides turnkey solutions for independent financial advisors



Grandma Got Facebook: More Seniors and Boomers Are Using Social Media

Educations & Interests



Education

Northeastern University

BS/MBA, Accounting

1993 – 1994

Sponsored by KPMG Peat Marwick to attend this highly competitive one year executive program. Letter of Commendation received; Selected by Classmates, Faculty, and Administration for demonstrating Leadership, Professionalism, and Scholastic Foundation.

Northeastern
University



Additional Info

Interests

Accredited Investors, Charitable Giving, Wealth Advisory, Real Estate, Retirement Planning, Inventions, sailing, golfing, cooking, painting, and spending time with my miniature wire-haired Dachshunds.

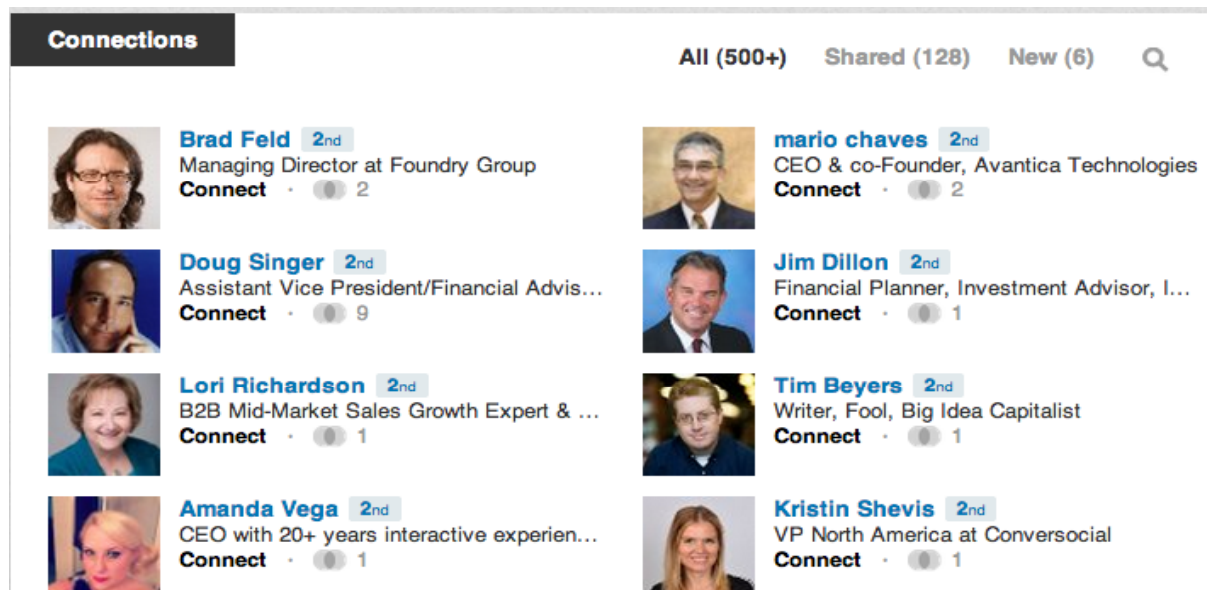


Organizations

Additional Organizations

Real Estate Investment Securities Association, Certified Commercial Investment Member, United States Green Building Council, National Association of Realtors, California Association of Realtors

- Why are they important?
- How do you make them?
- How to be professional and personable



The screenshot shows a LinkedIn 'Connections' page. At the top, there are filters for 'All (500+)', 'Shared (128)', and 'New (6)'. Below the filters, there are two columns of connection cards. Each card includes a profile picture, the person's name with a '2nd' degree indicator, their current role, and a 'Connect' button with a small circular icon and a number indicating the number of mutual connections.

Name	Role	Mutual Connections
Brad Feld	Managing Director at Foundry Group	2
Doug Singer	Assistant Vice President/Financial Advis...	9
Lori Richardson	B2B Mid-Market Sales Growth Expert & ...	1
Amanda Vega	CEO with 20+ years interactive experien...	1
mario chaves	CEO & co-Founder, Avantica Technologies	2
Jim Dillon	Financial Planner, Investment Advisor, I...	1
Tim Beyers	Writer, Fool, Big Idea Capitalist	1
Kristin Shevis	VP North America at Conversocial	1

Sample invite - connections



How do you know John?

- Colleague
- Classmate
- We've done business together
- Friend
- Groups

SEI Advisor Network Forum

- Other
- I don't know John

Include a personal note: (optional)

Hi John, we are both members of the SEI Advisor Group and have several 2nd degree connections. I'd like to add you to my network on LinkedIn.

If there is ever anything I can do to help you or anyone in your network don't hesitate to reach out.

Best,
Amy



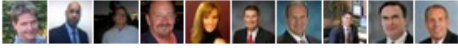


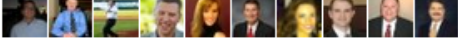
- What are they?
- Why are you getting so many?
- How to respond
- Are you allowed to have endorsements?
- How to manage endorsements

Endorsements



Skills & Expertise

Most endorsed for...

99+	Social Media Marketing	
99+	Online Marketing	
99+	Email Marketing	
99+	Marketing	
99+	Social Media	
72	Digital Marketing	
68	Advertising	
51	Marketing Strategy	
48	Facebook	
41	Public Speaking	

Skills & Expertise

Wealth Preservation...	Fixed Annuities	Insurance	Asset Management
Ed Slott Elite Advisor	Strategic Financial...	Personal Financial...	Tax Free Retirement
Comprehensive...	College Funding...	Certified Public...	Sales Management
Life Insurance	Wealth	Personal Financial...	See 35+ >

- Turn them off entirely
- Hide endorsements for specific skills
- Hide endorsements from specific people
- Delete or add specific skills

REMEMBER: When you do receive an endorsement you can always accept or decline it right off the bat by choosing the “Add to Profile” or “Skip” buttons.

SAMPLE Response - ENDORSEMENTS



Greetings first name,

I would like to thank you for your recent endorsement of our services here on LinkedIn. Thank you for the heart-felt appreciation of our work.

However, I will need to remove all my LI endorsements as the regulators forbid testimonials for investment advisors, and construe LI endorsements as such.

I would love to connect with you to learn more about your interests and needs with respect to my services you endorsed. I believe there are a number of ways we could help one another. Would you be free for a brief chat in the near future?

Looking forward to connecting soon.

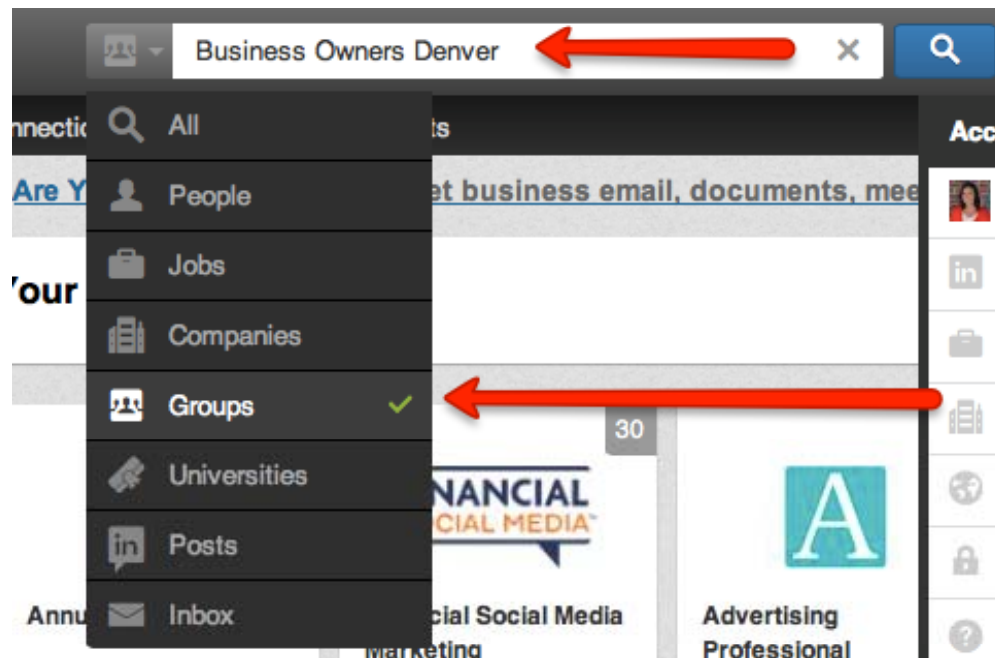
Thanks!

©David Gratke, a Principal for Gratke Wealth in Beaverton, Oregon

Groups



- How to find relevant groups
- Leveraging groups for networking
- Group participation best practices





Linked To **Denver** [Member]

Linked To **Denver** was created and is hosted by Integrated Alliances.


This group is for all types of people (sales, ...

Active: 34 discussions this month • **33,300 members**

▶ **15,324** in your network • Similar



Denver Accounting & Finance Professionals Network


 This group is for all Finance & Accounting Professionals who live in the **Denver** area! Are you one? Then join us!

14 discussions this month • **2,208 members**

▶ **695** in your network • Similar

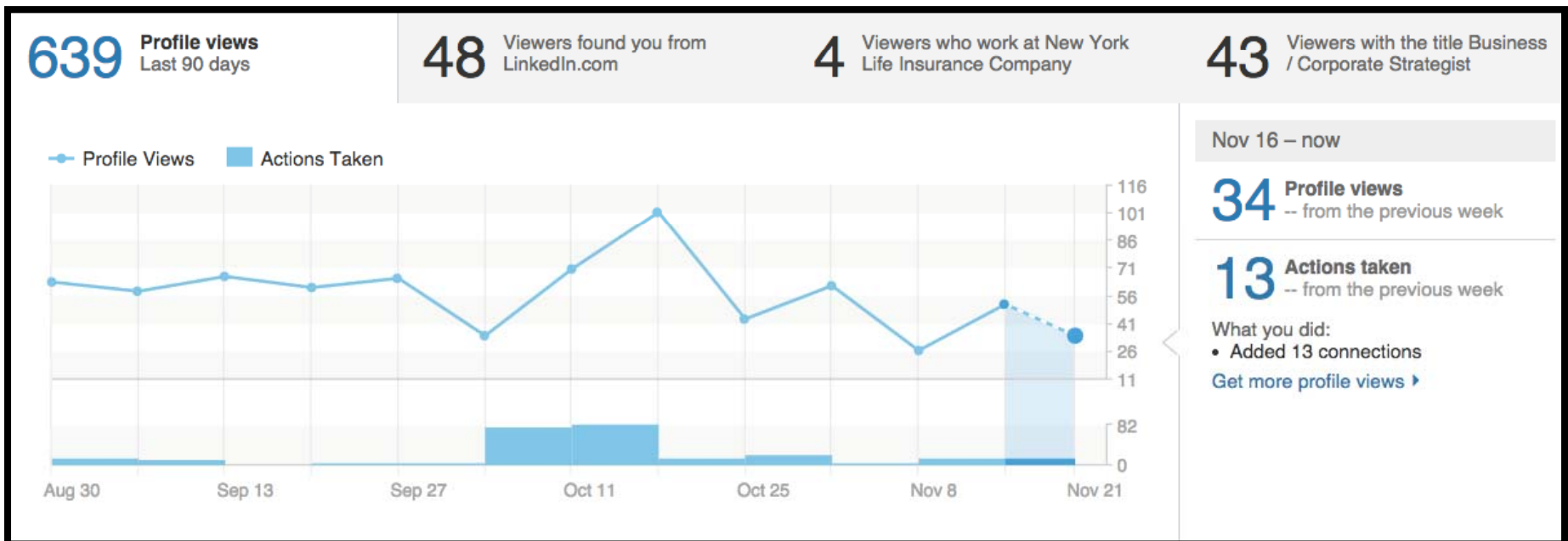


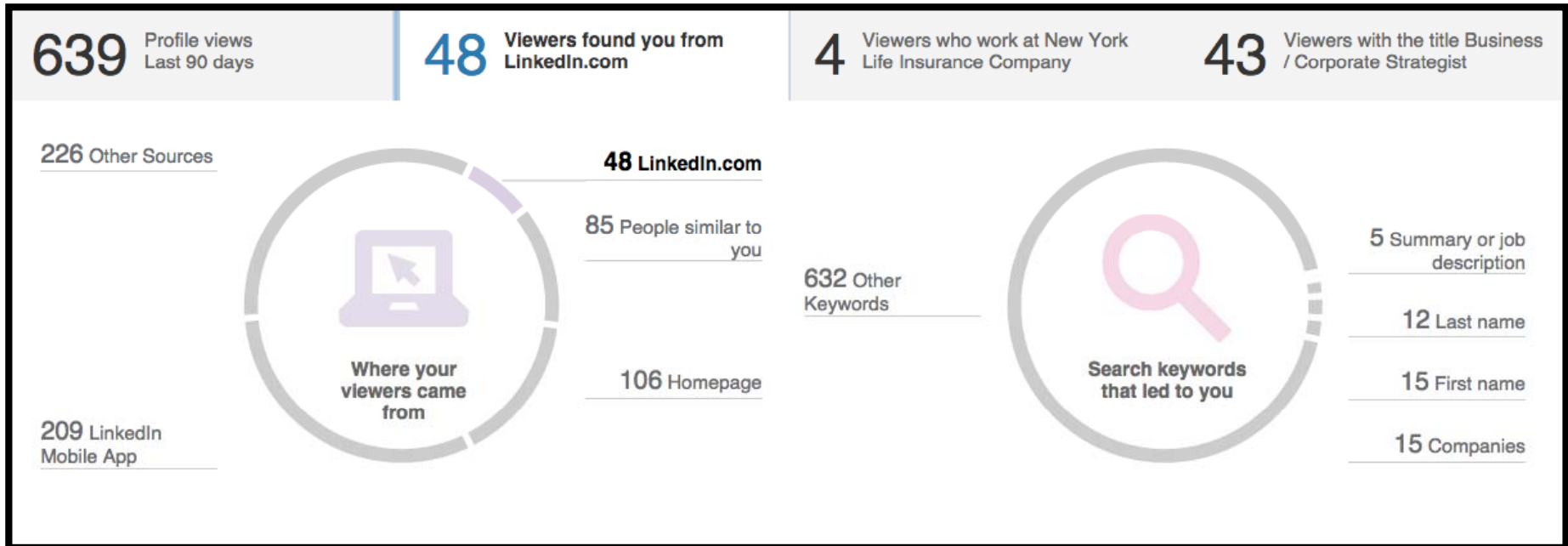
Denver Real Estate Brokers and Realtors Networking Group

 The purpose of the **Denver** Real Estate Brokers and Realtors Networking Group is to network independently among those who ...

16 discussions this month • **1,319 members**

▶ **573** in your network • Similar





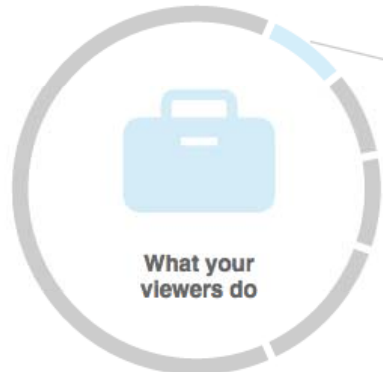
639 Profile views
Last 90 days

48 Viewers found you from
LinkedIn.com

4 Viewers who work at New York
Life Insurance Company

43 Viewers with the title
**Business / Corporate
Strategist**

370 Other Titles



**What your
viewers do**

**43 Business /
Corporate**

46 Founder /
Partner

49 Marketing
Specialist

75 Salesperson

253 Other
Industries



**Industries of
your viewers**

19 Information
Technology and

52 Insurance

54 Marketing and
Advertising

160 Financial
Services

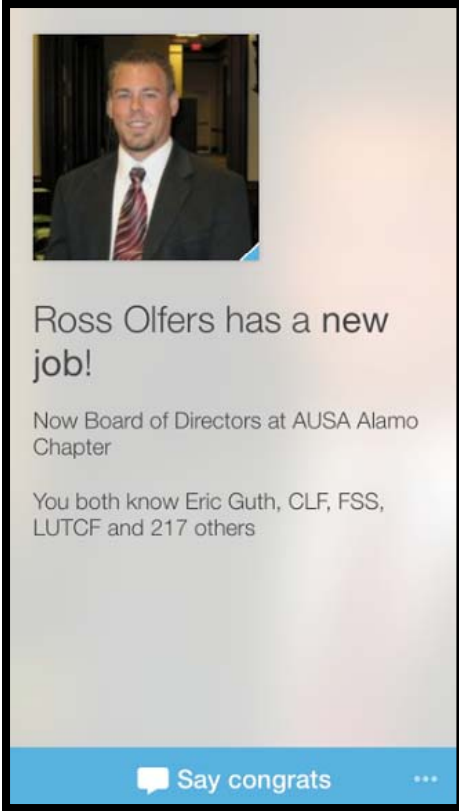
- Digitally import business cards
- Integrates into LinkedIn contacts




Apps – LinkedIn connected





- Browse new potential prospects
- Syncs with calendar for meeting reminders
- Network highlights + notifications

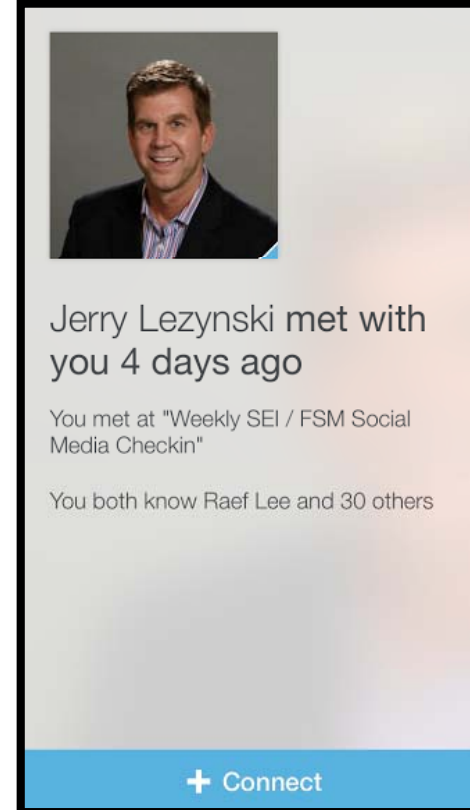




Ross Olfers has a new job!

Now Board of Directors at AUSA Alamo Chapter

You both know Eric Guth, CLF, FSS, LUTCF and 217 others


 Say congrats 




Jerry Lezynski met with you 4 days ago

You met at "Weekly SEI / FSM Social Media Checkin"

You both know Raef Lee and 30 others

 Connect



“

**IN A CHRONICALLY
LEAKING BOAT, ENERGY
DEVOTED TO CHANGING
VESSELS IS MORE
PRODUCTIVE THAN
ENERGY DEVOTED TO
PATCHING LEAKS.**

- Warren Buffett

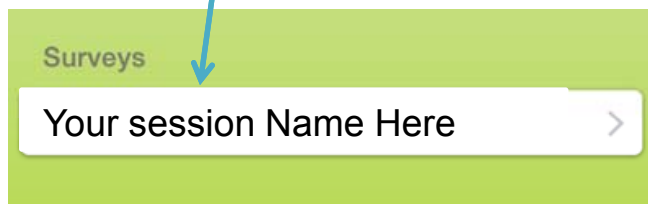
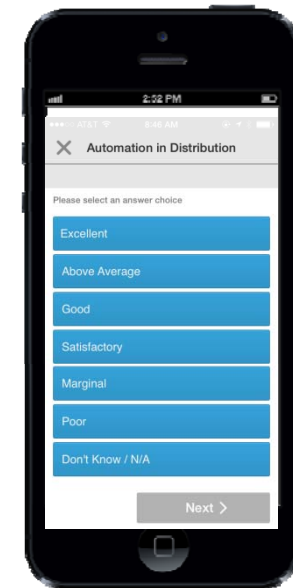
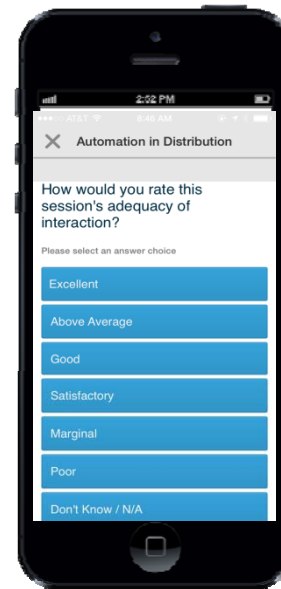
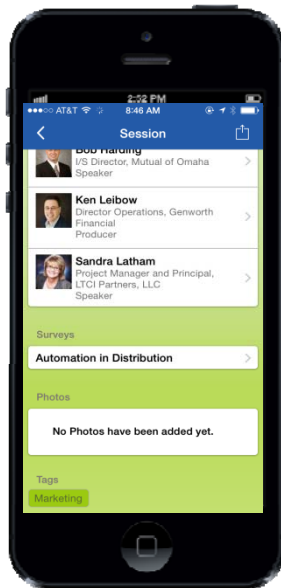
Don't forget to fill out the survey



1st you must have download the ILTCI Mobile App
- Go to your app store; search ILTCI. It's free.



1. Find the session
2. Scroll to the bottom
3. Tap on the session name below the survey



Tap on the answer you wish to submit

Click Next