



ADVISOR'S GUIDE TO SOCIAL MEDIA

VOLUME 2.0



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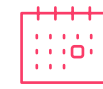
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01



INTRODUCTION

There's a new reality facing advisors today.

The way your clients communicate has changed. Instead of consulting traditional media, they now turn to online resources for quick, concise information, soundbites and headlines that keep them connected.

As your audience adopts emerging technologies, you too must evolve by incorporating new solutions that reinvent the way you communicate with your clients.

Enter social media, which is used by **nearly 40%** of all people in the world in 2017. Platforms like LinkedIn, Facebook, Twitter, Instagram, Snapchat and YouTube allow people to not only connect but also interact with one another for personal and professional purposes. This unprecedented access to both clients and prospects alike is opening doors to new opportunities for business professionals.

Financial advisors who understand and embrace the value this new form of communication offers will see a return that reaches far beyond the traditional methods of networking.

While it's well known that Millennials and Gen Zers have quickly adopted and rely heavily on these digital outlets, what you may not know is that Baby Boomers and Gen Xers are hot on their heels.

In fact, the **fastest growing demographic across social media is now the 65 and older age bracket.**

We know that employing a new marketing initiative through social media is time consuming and can be intimidating. But don't worry—we're here to help!

Run through this quick workbook and you'll have social media incorporated into your marketing efforts in no time. Fill it out, mark it up, and keep it on your desk to reference it often. And if you have any questions along the way, check out the last page for a few helpful places to turn to for more information.



So, What Are You Waiting For?
Time To Get To Work!
Happy Socializing!

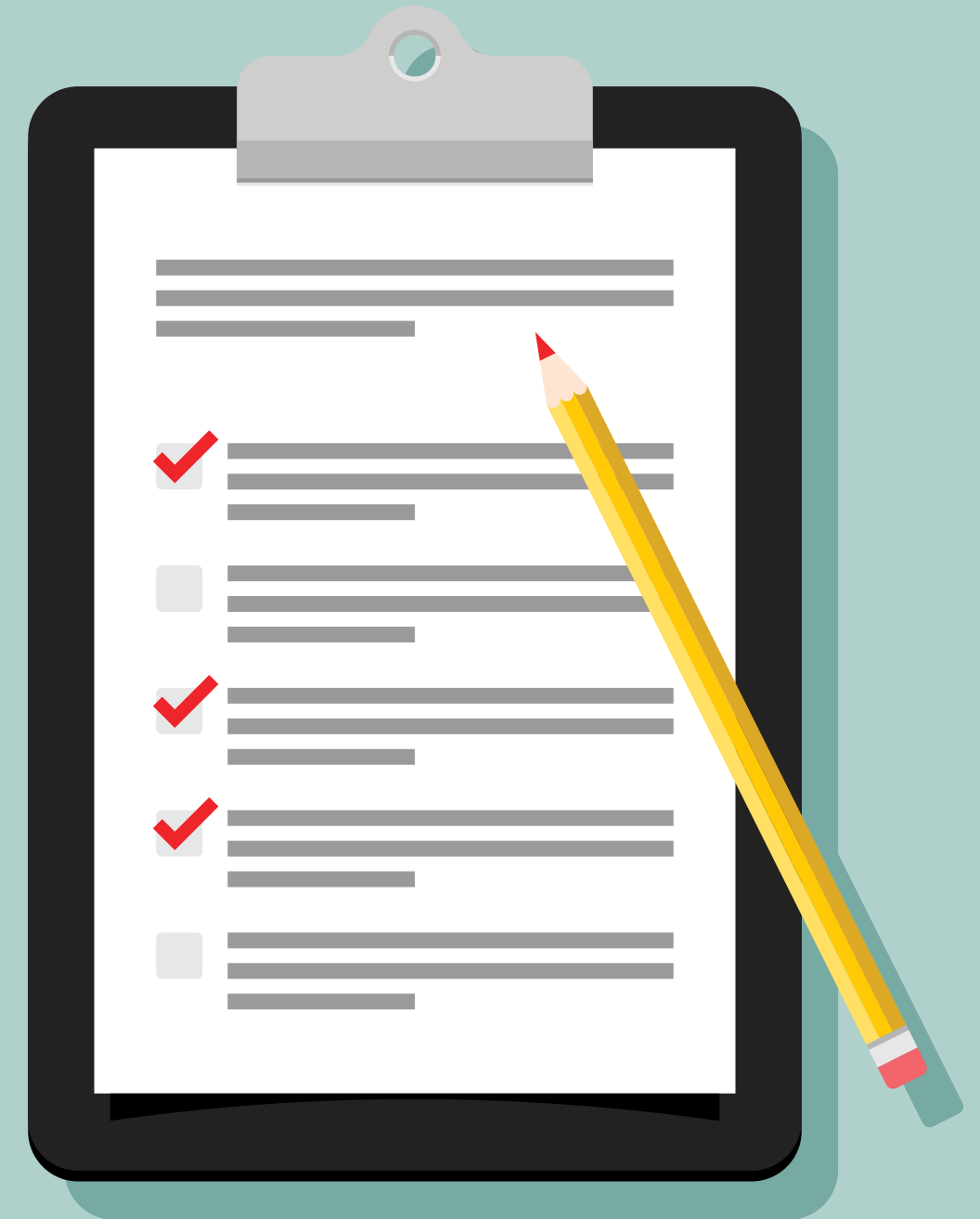
02



YOUR SOCIAL MEDIA CHECKLIST

Use this checklist to assess your social media skills and see where there's room for improvement.

- ☐ I understand how an effective social media strategy integrates with my existing marketing plan
- ☐ I've created my social media profiles
- ☐ I understand what types of content to post
- ☐ I understand my audience and where they interact on social media
- ☐ I plan to dedicate time on a weekly basis to publishing on social media
- ☐ I know what my audience discusses online and how to insert myself into their conversations
- ☐ I know how to spot opportunities and reach out to connections
- ☐ After looking through this workbook, I'm comfortable publishing to my social media channels, growing my network and engaging my audience

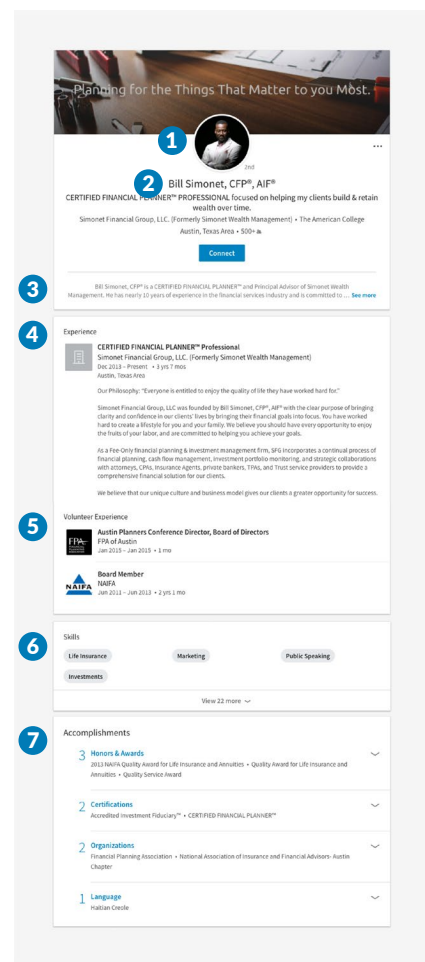


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CREATING YOUR SOCIAL MEDIA PROFILES

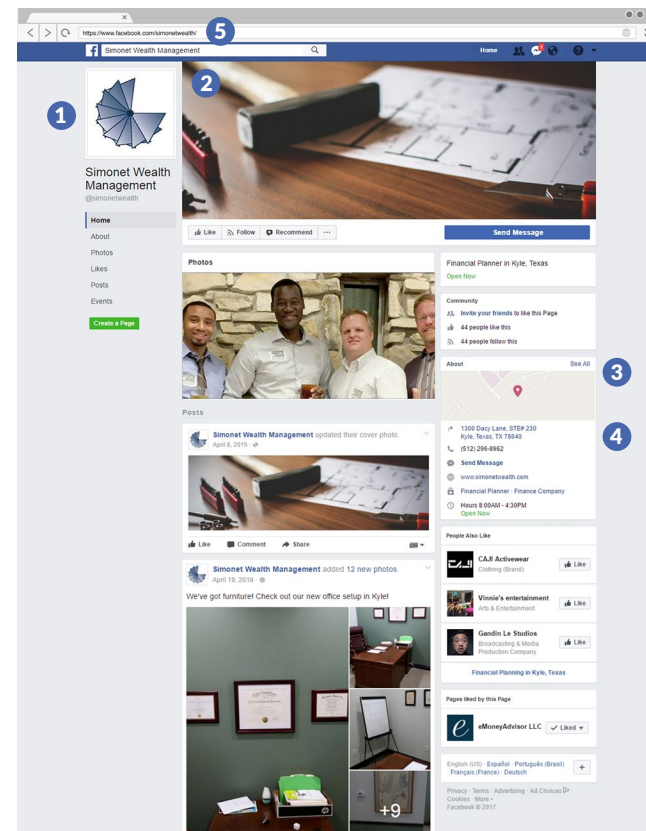
The first step to promoting your brand through social channels is to build your profiles. We've chosen a model advisor's LinkedIn, Facebook and Twitter pages for you to reference when setting up your profiles. Remember, the more information you include, the more searchable you become, increasing the likelihood you'll be found by prospects!



LinkedIn

LinkedIn is a business-focused social networking site that lets you connect with other like-minded professionals, business associates, and clients/prospects.

- 1 Profile Picture** - This should be a professional photo and representative of the brand image you want to convey.
- 2 Name** - Include your title as well as any certifications (CFP, CPA).
- 3 Summary** - What differentiates you? This section is ideal for including your elevator pitch or mission statement.
- 4 Current/Past Professional Work Experience** - The more detailed information you provide in this section, the more accurate a picture your audience will have of your expertise.
- 5 Volunteer Experience** - This section gives you the opportunity to connect with your audience over shared philanthropic values.
- 6 Skills** - Use keywords like wealth management, retirement planning, or other financial search terms to help identify your business.
- 7 Accomplishments** - Boost your online reputation by adding things like certifications, languages, and awards.



Facebook is a multi-faceted, comprehensive social network where users can share more personal details, photos and opinions with friends and family members. It also allows users to create company pages to promote their businesses.

- 1 Profile Picture** - This photo, while still representative of your brand, can showcase the personality of your team or office.
- 2 Cover Photo** - Keep this image consistent with your branding. Consider design elements from your website, or team photos.
- 3 About** - Similar to the “Summary” section in your LinkedIn profile, use this section to explain what differentiates you from other firms. You can also include a mission statement. Keep it concise and use clear language.
- 4 Contact Information** - How do you want your audience to connect with you? Remember, this information is public so consider whether you want to share your mobile number or personal email.
- 5 Custom URL** - Create a custom URL for your page that your audience will associate with your brand, making it easier to remember.



Twitter is a social media microblogging service that allows users to post and interact with short posts (140 characters) on a more frequent basis.



- 1 Twitter Handle** - Your Twitter handle, or username, should easily identify either your name or brand. But remember, you're limited to 15 characters max.
- 2 Profile Picture** - Again, your profile picture provides another opportunity to showcase your personality. Consider whether your account will represent your voice or that of your entire team.
- 3 Header Photo** - Keep this image consistent with your branding. Consider design elements from your website or team photos.
- 4 Description** - Describe who you are, what you do, and what your interests are. Keep it short and sweet, and feel free to get creative.

04



POSTING CONTENT

After taking that first step into the world of social media, it can be easy to leave your profile unattended. That's why you need a content plan!

Following strategies such as the 4-1-1 rule (4 original pieces, 1 retweet, 1 industry news piece) can help put content into perspective. It's also important to remember that your message for each channel can – and should – be different.

Here are a few resources you can draw from when creating content.

- Media mentions
- Business culture
- Newsletters
- Events
- Community involvement initiatives
- Industry news
- Opinions on the market/economy
- Retweets or shares
- Major accomplishments
- Honors and awards
- Famous or inspiring quotes
- Holiday wishes



05



ENGAGING YOUR AUDIENCE

Now that you have content, it's time to start formulating an engagement plan. Show your audience there's a human on the other end of your posts. To generate engaging content, understand the needs and interests of your target audience. When tailoring your message for specific social media platforms, here are a few things to remember.



When it comes to posting on LinkedIn, always keep it professional. Although this social media platform has drastically evolved over the years, posts unrelated to professional topics are still very much taboo. Posts that include articles related to the financial services industry, company news or announcements, and thought leadership pieces typically do well on LinkedIn.

Another great way to increase your following and expand your network on LinkedIn is to join and participate in groups relevant to your industry or expertise. And of course, if you're looking to fill a role in your office, LinkedIn is a great resource to seek out or attract potential candidates.



Facebook is still king of social media with over 1.94 billion monthly active users. With a following like that, it's important to create and publish focused content for your target audience. By incorporating images into your posts, you're also more likely to drive more engagement and views.

When sharing content on Facebook, such as a blog post or some type of offer, make sure to keep your description brief and offer a link for readers to read more. And if you really want to drive engagement to your page, consider sharing or streaming (Facebook Live) video to capture your audience's attention.



The dreaded 140 characters! Although it seems tough to condense your message to such a small number of words, a well-crafted tweet can drive a lot of traffic to your website, blog post or content offer. A popular rule of thumb on this social media channel is to leverage widely-used hashtags ([learn more about that here!](#)) to expand the audience that can see your tweet. Other features to consider are:



POLLS

Use this feature for instant customer interaction and feedback, or just to spark a lighthearted conversation.



IMAGES/VIDEO

Images and video are a great way to drive more engagement to your tweets. Twitter timelines can get inundated with text and links, so you'll instantly stand out by sharing more visual content.



GIFs

Lacking relevant images or video that correspond with your tweet/post? Twitter's GIF database allows you to easily search for short looping videos that you can quickly add to a tweet for a better visual impact.



GROWING YOUR AUDIENCE

Even with a consistent stream of timely and relevant content, the conversation falls flat without an active audience. To help increase your following and grow your presence, first use the search features to look up people who are already part of your circle. Establishing connections with people you know will help introduce you to secondary contacts and further expand your network.

GET TO WORK

Complete the worksheet below to brainstorm opportunities to grow your audience.

LinkedIn

- Look for people who are already in your network
- Check out your second and third level connections
- Search keywords and locations that your target audience would include in their profile
- Join LinkedIn groups and engage in conversations relevant to your expertise
- What keywords would you search for on LinkedIn to find your target audience? **(ex: physicians, retirees, etc.)**

WRITE YOUR IDEAS BELOW

Facebook

- Invite people in your network to like your page
- Connect with your network's friends or followers
- See what your network "likes" on Facebook and reach out to others who share the same interests if they fall within your target audience
- What specific contacts would you target on Facebook based on who's part of your existing network?

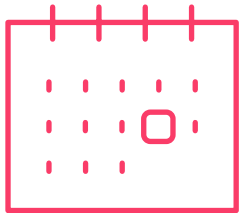
WRITE YOUR IDEAS BELOW

Twitter

- Search for users who are already in your network
- Search relevant hashtags and follow the people who are participating in those conversations. Need a quick refresher on how hashtags work? Refer to **Art of the #Hashtag** article on the eMoney blog.
- Look up who the users in your network are following
- What hashtags would your target audience use to search for you **(ex: #financialadvice, #wealthmanager, #retirementplan, #advisor)**? Keep in mind, these are the hashtags you can use in your profile and in your tweets to make it easier for prospects and clients to find you.

WRITE YOUR IDEAS BELOW

07



ALIGNING SOCIAL MEDIA WITH MARKETING EFFORTS

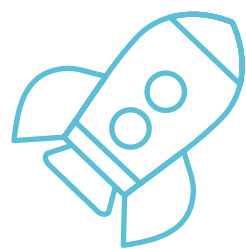
If you have several marketing initiatives in motion, consider implementing a content management system — software applications used to create and manage digital content — to keep track of your efforts. Automation tools can help keep your posts consistent with your firm’s brand messaging and assist you in remaining FINRA compliant. So, look into options that help you schedule content, archive posts and provide analytics on your social presence.

For example, Google calendars are a great way to keep all of your marketing initiatives on track. Fill in what two weeks of content would look like for your business using the sample calendar below.

SUNDAY		Social Media: Post photos of staff and office from volunteer event
MONDAY	Client Communication: Send weekly newsletter Social Media: Post alert about weekly newsletter/subscribe now offer	Client Communication: Send weekly newsletter Social Media: Post alert about weekly newsletter/subscribe now offer
TUESDAY	Social Media: Reminder that Portfolio Reviews are due soon	Social Media: Post industry news and share some quick thoughts
WEDNESDAY	Social Media: Post article from Weekly Newsletter	Social Media: Post reminder about tomorrow’s client event
THURSDAY	Social Media: Post reminder about upcoming client event	Event: Client Appreciation Outing Social Media: Post some live shots of event
FRIDAY	Social Media: Post article from Weekly Newsletter	Social Media: ‘Thank You’ post for all who attended yesterday’s event
SATURDAY	Event: Office volunteer event	

SUNDAY		
MONDAY		
TUESDAY		
WEDNESDAY		
THURSDAY		
FRIDAY		
SATURDAY		

08



TIME TO GET STARTED

Now that you know the basics of developing and executing a social media strategy, it's time to dive right in.

As you've probably gathered from this eBook, social media takes time – and time, as we all know is very valuable. As you move forward and step into the social universe, here are some handy resources that will guide you down the right path.

EMONEY BLOG

[Social Media Security Steps for Financial Advisors](#)

[3 Tips for Handling Negative Comments on Social Media](#)

[The Art of the #Hashtag](#)

[Using LinkedIn for More Personal Introductions](#)

OTHER RESOURCES

[Financial Advisors: 15 Tips To Use Social Media \(Compliantly\)](#)

[Social Media Guide for CFP® Professionals](#)

[How Financial Advisors are Leveraging Social - Webinar](#)

[FAQs from Financial Advisors about Social Media Marketing](#)

APPENDIX

Greenwood, Shannon; Perrin, Adnrew; Duggan, Maevezbas (2016)

[Social Media Update 2016](#)

Castliefield Staff. (2016)

[More grey hair on Facebook as baby boomers become fastest growing social media demographic](#)

Skinner, Liz. (2016)

[Advisers finding more social media success](#)

Godfrey, Ashley. (2017)

[How to Tailor Your Message to Different Social Media Sites](#)



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