

# 10 Steps to a Winning Social Media Strategy

## ➤➤➤➤ The Way We Communicate Has Changed



of U.S. adults use at least one social media site<sup>1</sup>



of adults use social media as a key investment information source<sup>2</sup>



of advisors who use social media for business say social media has helped them gain new clients<sup>3</sup>

Nearly half of financial professionals report using social media. And they're gaining new clients, strengthening their client relationships, and communicating more frequently with their clients because of it. Here are 10 easy steps to navigate the social landscape and create a winning strategy.

### 1. Learn the Social Landscape

Take some time to learn about each network and consider where your target audience might be—Facebook, LinkedIn, Twitter, YouTube, and more.

### 2. Evaluate Your Current Social Media

What's working well and what isn't? Understand where you are today so you can pinpoint strengths, gaps, opportunities and know where to focus your efforts.

### 3. Create Your Social Media Strategy

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### 5. Build Engaging Profiles

Your profile is your public face to the world. Ensure contact details are clear, photos are professional, and show some personality!

### 6. Establish Connections

Find people you know and ask to connect. A personalized note introducing yourself often goes a long way.

### 7. Post Content

Post according to your social media calendar, add posts that give your audience a sense of who you are, and consider tone and how you can show your personality.

### 8. Engage with Others

Like, Comment, Share! Every time you post content, you're looking for others to engage with it. So encourage them by doing the same.

### 9. Expand Your Network

As you become more socially savvy and awareness grows, you will receive connection or friend requests from outsiders. Some people only accept requests from people they know—others accept as many as they can. Remember, broad exposure builds awareness.

### 10. Monitor Your Progress

Social media takes time. Give yourself a few months to review. Once you have some data behind you, take a look. Did you meet your goal?

Financial planning and marketing complement each other. You're already offering your clients holistic financial planning to meet their goals. Let the world know what you do, and how well you do it!

The combination of eMoney Planning and Marketing gives you comprehensive financial planning and automated marketing capabilities that will keep your clients happy and engaged—all in one powerful package. [Click here](#) for more information.

#### Sources:

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2. <https://www.investopedia.com/articles/professionals/061013/how-financial-advisors-are-leveraging-social-media.asp>
3. The Putnam Social Advisor Survey. Putnam Investments. April 2019.