

LinkedIn: Time Block for Client Acquisition

Social media is just that — social. Time block, be disciplined, set a routine and before long it will become a habit. Online relationships take time to build, but because LinkedIn is a professional network it allows you to be more direct in your interactions. Below are some results-oriented tasks you'll want to perform daily, weekly and as needed.*

Daily Actions

✓	Respond to LinkedIn messages and invitations Best practice: Differentiate yourself – send a thank you message to anyone who connects with you. <i>“Hi Bill, Thanks for adding me to your network. I look forward to chatting sometime soon. Best, Laura 212-555-5517”</i>
	Review LinkedIn Notifications (from the top menu bar – free LinkedIn or Home Page in Sales Nav, further refine using menu; job changes, lead news, lead updates, etc.) Best Practice: Send a personalized message to congratulate (new job, work anniversary) or wish a Happy Birthday. <i>“Happy Birthday, Sima! Wishing you a wonderful day. Best, Laura 212-555-5517”</i>
	Review ‘Who’s Viewed Your Profile’ for the past 90 days (with Sales Nav) Best Practice: If they viewed you, they are probably thinking about you. Use this opportunity to reach out or connect with them if they are an ideal prospect.

Weekly Actions

	Stay top of mind: Post preapproved firm content 1-2 times/week. Best practice: Setup an editorial calendar and post during these times: Tues./Wed./Thurs. between 7-9am, 12 noon or after 5pm. Saturday between 10am-12pm (local time).
	Continually build your network. Connect with people you recently met or use the "people you may know" feature. Best practice: Always customize the connection request, write a personal relevant note, mention where you met, what or whom you share in common. <i>“Hi Sameer, It was so nice meeting at the FPA event on Oct 19. I would like to connect with you on LinkedIn. Best, Laura 212-555-5517”</i>
	Develop your own LinkedIn drip system Best practice: Send personalized messages to 1 or 2 people a week that you would like to get to know better. Sales Nav will disclose their activity (work ann., job changes, in the news, shares, etc.) or share pre-approved firm content. <i>“Hi Carson, I loved your recent LinkedIn post on productivity. I had no clue so many productivity tools existed. Would like to grab coffee soon. Best, Laura 212-555-5517”</i>
	Source names for a warm introduction. Best practice: Review your clients connections, which are your 2 nd degree connections. Source the names of 3 to 5 people whom you would like to be introduced to. See the ‘Script’ cheat sheet for how to ask for the introduction.

Advisor Team Actions

During Weekly Team Meetings

Review who you are meeting with and ensure sure everyone on the team is connected to the clients (and their adult children) on LinkedIn.

Review Clients LinkedIn Profiles as well as any other social platforms they are a part of (e.g., Facebook, Twitter, etc.), to look for updates and further connection points; hobbies, passions, interests, schools, groups, etc. you may not have been aware of. *Remember: people share so much information online, the same type of information that use to take advisors 5-10 years to accumulate, turn on your social listening ears.*

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Track the Pipeline Create a simple spreadsheet for tracking purposes or use the tagging feature in Sales Nav and create custom pipelines for each client.

Best practice: Review the names of prospects during weekly team meetings and determine a game plan as to how to connect and take the relationship offline.

As Needed

Fill your events with prospects you've sourced through LinkedIn

Best practice: : Review your clients' connections, which are your 2nd degree connections. Source the names of individuals you would like to meet. Or, use the 'Lead Builder' to find qualified prospects that would be interested in your event.

Review LinkedIn profiles before upcoming client, prospect and COI meetings

Best practice: Deepen relationships by finding common connection points, such as groups they are a part of, influencers they follow, alumni, connections you may have in common, etc.

Annually

Submit your profile for an annual compliance review.

Review your profile & determine if updates are needed (picture, summary, certifications, etc.).

Your Time Blocking ROI

As with any expedition, the work will seem greater than the results in the beginning, but if you're consistent you will begin to see more activity and interaction. Commit to LinkedIn first thing in the morning, every morning. Remember, **activity generates results**. Five to ten minutes a day, an hour or two a week will garner huge results!

**FINRA has specific compliance requirements surrounding the use electronic media and communications you can find summarized on its website www.finra.org*

Always check with compliance before you start your social media initiative. Abide by your firms social media policy as it may go above and beyond those of FINRA. Keep in mind your firms interpretations of policies may change overtime; therefore be sure to have someone on your team check regularly with compliance for any changes in policy.