

FINANCIAL PROFESSIONALS: SHOULD YOU DO THE SOCIAL MEDIA DANCE?

It's mandatory to break the technology barrier with a few marketing must-haves, but social media remains an unproven strategy. There are **no guarantees and no proven direct link to productivity**. Let a social media strategy complement, rather than replace your marketing plan.



THE AMERICAN COLLEGE
NORTHWESTERN MUTUAL
GRANUM CENTER
FOR FINANCIAL SECURITY

THE TRADITIONAL

No website, no LinkedIn profile and no social media activity. You're behind.

BASELINE

HOW DO I CATCH UP?

GET A WEBSITE.

Establish instant credibility and make a great first impression.

CREATE A LINKEDIN PROFILE.

It's your online business card.

COZY UP TO TECHNOLOGY.

Get comfortable online. Your clients already are.



HOW DO I UP MY GAME?

DELIVER.

Educate clients via LinkedIn; they want to learn from YOU.

LEARN.

Attend credible social media courses. Learn to navigate wisely.

BE INTENTIONAL.

Create a plan. Analyze results.



THE DABBLER

You've got a website, an outdated blog and you participate in social media based on hip-shots & hope.

VALUE-ADD



THE PIONEER

You blog, post and discuss, with just a few referrals to show.

UNPROVEN

HOW DO I MAKE IT COUNT?

GET ANALYTICAL.

Monitor metrics, adjust strategy, review your goals.

LEVERAGE EXPERTISE.

Ask your company for advice, benefits and costs.

DELEGATE TASKS.

Stay in front of your client, not in front of YouTube.

SOCIAL MEDIA DON'Ts

DON'T surprise a client. Give them a heads-up before making a connection.

DON'T request Facebook friendship unless the client's a personal friend.

DON'T assume connection leads to conversation.

DON'T use social media to push a product or blog.

DON'T reveal anything about your client. Period.

DON'T share personal thoughts (restaurants, vacations, etc).

DON'T overstep. Read company rules. Stay in compliance.

DON'T abuse your connections.