

Creating Your Social Presence

DEMYSTIFY SEO AND ESTABLISH YOUR SOCIAL PRESENCE WITH THESE UNIVERSAL BEST PRACTICES

WHAT'S INCLUDED?

- Be Findable Checklist
- Let's Get Social!
- Search Engine Optimization
- Social Profile Optimization
- Develop goals and take action!
- How Hearsay Helps
- Industry-Specific Tips

Course Materials:

- PDF Tipsheet (5 pages)
- Estimated Time: 15-20 minutes

Be Findable Checklist



BE



GROW



HEAR



SAY



Hearsay System's standardized methodology to achieve advisor social success is called BE | GROW | HEAR | SAY (BGHS). The following document walks through Step 1: "BE".

"BE" success comprises two components: the number of networks you are connected with on Social and which you have connected to Hearsay Social. Here are some items you could work on if you are looking to improve in this category to increase your findability on social:

ASSESS WHAT NETWORKS YOU ARE CURRENTLY LEVERAGING FOR BUSINESS

- Do you have a business presence on all the channels your company enables you to leverage? Do you have a LinkedIn Profile, Facebook Business Page, and/or Twitter account?
 - Depending on your company's social media policy guidelines, you may be restricted to 1 or 2 social media networks - please email your program admin for details.
 - LinkedIn lets you tap into the world's largest professional network (provide some stats?); Facebook Business Pages let you connect with your local community, and Twitter is a great venue for sharing thought leadership to a wider audience.
- Create a profile using your organization's social media guidelines for any network you haven't yet leveraged.
- Connect your new social media account to Hearsay by logging in, and going to "Settings", and then clicking "Accounts" and selecting the network.

MAKE COMPLIANCE COUNT

Your Profile is a reflection of what you want to portray to your audience on social: please spend some time creating an awesome Profile, which truly reflects you as a professional, or the business you are trying to promote.

- Check your profile status by going logging in to Hearsay and going to "Settings" and then "Profiles".
- If your profile is in an "Action Required" state, click the "copy to X" blue button and follow the steps until your profile achieves a green "Profile Approved" status.
- If your profile is in a "Changes Denied" state, click "Make Required Edits" and use the feedback provided by your supervision team to edit and resubmit.
 - Don't forget that when you get the email telling you your profile is approved, to come back in and go through the steps above in the "Action Required" section.

OPTIMIZE YOUR PROFILE(S)

- Have you looked at your profiles recently? Are they up to date? Go to Hearsay, "Settings" > "Profiles" and click the blue link to each of your profiles. Make sure all the logistical data is up to date (address, contact information, hours, etc.).
- Have you updated your Facebook business page Cover Photo in the last 6 months? How about your Twitter Header? If not, consider checking out whether your organization provides a cover photo library from which you can choose a number of different pre-made cover photos.
- Have you updated your "Long Description" on Facebook or "Summary" section on LinkedIn in the last year? If not, it may be time to make some edits. On LinkedIn include keywords you think people search for to find professionals with your background in order to show up in more search results.
- Have you achieved any new certifications? If so, go to Hearsay Social, "Settings" and "Profiles" and request edits to add them to the appropriate section of your profile.
- Don't forget, once you get any of the above changes approved, you still need to log back in and click "Copy to 'X Network'" to keep your profiles compliant and up to date.

Following even some of these steps will help you be more discoverable to those looking for you, in the different places people may search. It will also ensure that you are portraying yourself professionally and compliantly on Social. This way, your Profile will match the professional thought leadership content you will be sharing with your networks.

Be Findable - Creating Your Social Presence



PROGRAM OVERVIEW

In this section, you will learn how to create complete, professional profiles on social media so clients and prospects can find you. Boost your online presence with SEO tricks tips and learn how to grow your main social networks by optimizing your profiles.

LET'S GET SOCIAL

Universal best practices for establishing your social presence

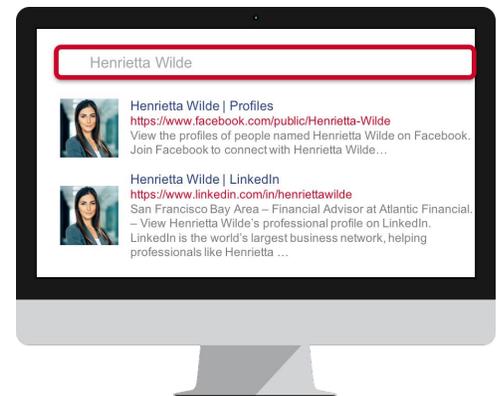
Today we live in a new reality where a "growing number of customers refuse to do business with reps who are not easily... FINDABLE and REACHABLE through social media, mobile and the web."

Why? Your customers are digital and their demands are based both on CONVENIENCE and on the fact that they cannot validate the TRUSTWORTHINESS of reps who lack an online footprint.

Think about it. Would you make an expensive purchase from a brand if they had zero information available online?

Best practices for establishing your social presence:

- Be Findable: Use keywords to increase your findability on the web.
- Profile Sections: Fill out your profile sections completely.
- Photos: Upload a professional headshot and cover photo.
- Username: Use the same name and try to claim the same handle on all sites.
- Updates: Keep your profile and contact information up-to-date.
- Brand: Authenticity is the etiquette and expectation on social media.



SEARCH ENGINE OPTIMIZATION

Demystifying SEO and staying top of mind

What is SEO?

Search engine optimization is the "process of maximizing the number of visitors to a particular website by ensuring that the site appears high on the list of results returned by a search engine." SEO relates to the visibility of your website in unpaid results (i.e. natural, organic, earned). This is especially important for traffic and conversions.

SEO TIPS AND TRICKS

Quality Content. Text, images, and video. Quality content goes beyond your basic contact information.

Dynamic Content. Share news articles, differentiate your content (long form vs. short form). Ensure you have a website that allows you to post content.

Relevant Keywords. Optimize your website for the web and search engines by using relevant keywords and making sure your information is current.

Mobile Optimization. Some questions to ask yourself... Does your website load on a mobile device? How long does it take to load? Is it fully responsive?

Local Knowledge. Tailor your website to showcase your local knowledge and your brand beyond your generic corporate site. Advisors and agents are experts locally and have niches.

SOCIAL PROFILE OPTIMIZATION

How to make killer social profiles

- Fill out all of your profile sections – there's nothing worse than a partially filled-out, unattended social account
- Choose a custom URL or username that is easy to find and helps boost the SEO of your brand
- Ensure that your profile photo and username are consistent across all social platforms
- Connect with peers, influencers, clients and centers of influence (COIs)

Be Findable - Creating Your Social Presence



HOW HEARSAY HELPS

Connect All Social Media Accounts to One Dashboard

If you haven't done so already, you can connect your accounts easily on your home page by clicking "Connect Accounts" and connect LinkedIn, Google+, Facebook, and Twitter.

If at anytime you choose to remove or add another social media account, you can do so quickly and easily

Post Compliant and On-Brand Content for Your Organization

Post pre-approved content from one place. Once a post is approved, it will appear in the Post Library for you to post or schedule to any and all connected accounts.

Use Tags to Organize Your Content by Focus

Tag whatever is specifically focused around cross-selling in your organization. To filter your content library, check the box next to whatever topic you'd like to post about.

Save Time – Schedule Out Your Content

Prepping your social media plan for the week can be done quickly via our scheduling tool. When you go to post or request approval for a post, you can choose to schedule it in advance.

Under Content > Calendar, you can view all scheduled posts in a calendar format.

Create Seasonal and Themed Promotion Campaigns

Admins can bundle combinations of content together to release separately at timed intervals as a fluid campaign.

With our new Dynamic Campaigns, advisors or agents subscribe to a campaign once, and relevant content will publish to their social profiles as you add it to the Campaign. It's important to be active (and thus available) to present multiple possible touchpoints for your clients to reach out to you.

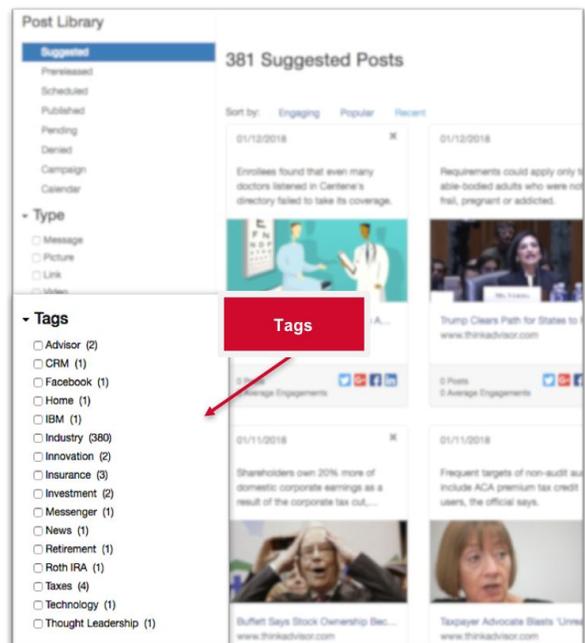
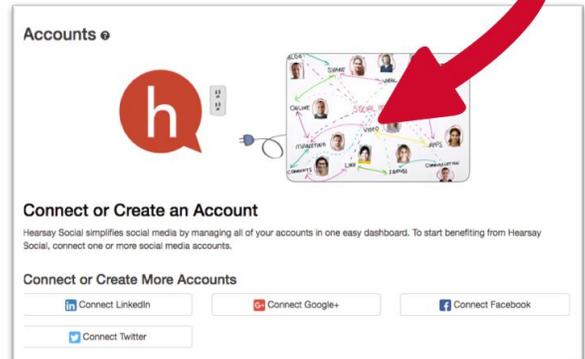
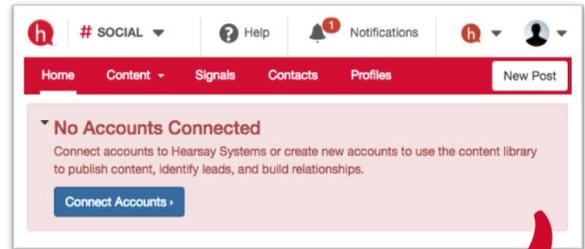
Interact, Reach Out, Analyze, and Post All In One Place

Like, comment, and share on all of your social accounts from one streamlined platform.

Reach out to connections across all networks easily. Find and connect with prospects before and after meetings.

Use analytics to up your social media game. Analyze the metrics on all of your connected accounts to see how you can improve your social media usage.

Post at optimal times . Use this information to determine the ideal ways to connect with your audience.



Be Findable - Creating Your Social Presence



BE FINDABLE: WEALTH MANAGEMENT TIPS

Use Popular Keywords

Wordstream gives you a free ranking of the top keywords by industry. Refer to it for popular financial services keywords.

Example Financial Services Keywords: finance, investing, DFS, loans, insurance, mortgage, FSA, life insurance

Facebook Page Name

Include your full name followed by "Financial Advisor" or your certification. Putting it in your page name will make it easier for prospects to find you via search engines since they will mostly like be searching for phrases like "financial advisor".

Example Financial Advisor Page Name: Henrietta Wilde, CFP Financial Advisor

Twitter Bio Tips

With a limit of 160 characters, the Twitter bio might not seem very important when it comes to building out your profile. The fact is, when users search, Twitter will not only pull up tweets with those keywords, but also Twitter bios that include them as well. Include popular industry keywords as well as the @ for organizations that you're affiliated with, such as your alma mater or causes you volunteer for.

Not only does it give you a chance to share some personal information about yourself, and make you more authentic, but when prospects with shared interests search for these @'s, you'll appear on their radar. Who knows, maybe it'll be an opportunity for you to connect on some commonalities!

Example: Financial advisor @AtlanticFinancial, @BerkeleyHaas alum and @SFACC volunteer. Love helping clients with their mortgages and investments, reading and hiking!

New Advisor Tip

Being findable is integral to growing your book of business. When creating your profiles, ask yourself the following questions:

- Which clients are you targeting?
- What kind of profile would attract them?
- What keywords should you put in your bio and about me?

Brand Strengthening

- **Articulate values you represent.** This builds trust and attracts the customers that will value your services. The clearer you are with your values, the more trust is built.
- **Alignment with corporate brand.** Especially in terms of colors/branding if you're a career/captive agent. Independent agents are typically not subject to same guidelines since they sell multiple insurers products.
- **Consistent brand experience spanning offline and online channels.** Providing a 'WOW' experience helps with retention of clients and increases share of wallet. Let the client "experience your brand"
- **Spend time perfecting your "About Us" / Bio / Long Description sections.** This is often most frequently visited... think about service proposition and how its unique / differentiating factor

3 THINGS TO DO TODAY

1. Revamp your Summary and Experience sections on your LinkedIn profile to include more keywords
2. Make sure your photos and all information in your social media profiles is up to date.
3. If you don't have a Facebook Business Page for your business, set one up and experiment with content!

FURTHER READING

1. [The Time You \(and your clients\) Spend on Social Media](#)

2. 5 SEO Tips