LinkedIn Guide for Top Advisors

Strategies to take your online presence to the next level

Sun Life

INTRODUCTION TO LINKEDIN

LinkedIn is a professional networking platform. It allows users to publish a personal Profile highlighting their experience, achievements, and expertise. You can share information with your network and engage in conversations with other professionals.

As an advisor, your job is building relationships. Creating strong relationships leads to referrals, and referrals lead to the growth of your business. LinkedIn allows you to demonstrate your expertise and differentiate yourself in front of your Clients' networks, without having to wait for that introduction. Through creating, sharing, and engaging with content, you can build your brand image and reputation. You can also connect with other professionals in your network to expand your professional knowledge and stay informed about the latest trends within your industry.

ABOUT THIS GUIDE

Maintaining an online profile may seem time-consuming, or maybe you just don't know where to start, so we've broken it down for you. Designed with financial advisors in mind, this guide will teach you how to get started on LinkedIn, and offer different strategies to put your Profile to work. It's as simple as A-B-C.

Activate

Get started by creating your online presence. Learn how to design a Profile and Company Page to portray your desired brand image.

Build

Build your presence and reach by engaging with your network and using LinkedIn's more advanced Profile features.

Cultivate

Grow your network and your business by driving traffic to your online presence and nurturing leads.

TABLE OF CONTENTS

Activate

Define Your Objective 5

Personal Profile 6

Company Page 8

Settings & Privacy 9

Cultivate

Grow Your Network 15

Drive Traffic 17

Search Engine Optimization (SEO) 18

Measure Results 20

Build

Engage Your Network 11

Enhance Your Profile 13

Final Overview

LinkedIn Checklist 22

Action Plan 23

Activate

Get started by creating your online presence. Learn how to design a Profile and Company Page to portray your desired brand image. **Remember, everything you publish should be a true and accurate representation of yourself.**

DEFINE YOUR OBJECTIVE

Determining what your objective is will shape the way you build your Profile, influence how you engage with your network, and ultimately determine the benefit you get from it.

Virtual Business Card

Your Profile can be a quick snapshot of your experience and your focus. Consider it like an online resume that you can direct Clients to.

Connect with Clients

Do you want to provide evidence of your knowledge and expertise to your network? You can publish articles and posts, and interact with your networks' content to bring credibility to your Profile.

Nurture Leads

Extend your reach beyond Clients and engage with your broader network. Continuously engage, ask questions, invite participation, and drive traffic to your website to build relationships with potential Clients.

The more you put into your LinkedIn, the more you'll get out of it. Having a static page is important, but using the site's interactive features to connect with your network will improve your ability to reach new Clients and grow your business. No matter your objective, you must be consistent in your presence – in the way you write your Profile and the frequency in which you interact.

PERSONAL PROFILE

Your personal Profile is all about you. Be honest about who you are, how you help Clients, and how you got where you are today. You must have a personal Profile before you can create a Company Page.

Headshot

Choose a professional headshot that can easily be seen from a distance. A best practice is to use a photo in which your shoulders are facing to the left, looking towards your Profile. You can always flip your image horizontally if needed. To compare multiple headshots, use a photo testing website to see which one portrays your brand image best.

Cover Image

Personalize your cover image to complete your Profile. You can use a photo of your logo or your office, an action shot of you giving a presentation, or another image that supports your professional brand.

Name and Credentials

Write your full name and include any credentials you have related to your role as financial advisor i.e., CLU ®, CFP ®, CHS™, FEA®. If your licensing province requires you to use certain titles, make sure you include them here or somewhere in the about section.

Headline

Your Headline is shown next to your headshot whenever you leave a comment. Use it to quickly connect with your target audience using the formula, "I help [target client] to [desired outcome] by [your expertise]."

Custom URL

Change the random digits in your generic URL to your name. It provides you with an easy and professional way to direct people to your LinkedIn page. It also increases your overall SEO results. For example, rather than **linkedin.com/123a456d8r79**, you can change it to **linkedin.com/alison-h-campbell**.

Contact Information

Add your contact information to allow potential Clients to get in touch with you. You should add your phone number, email address, and website to your Profile.

About Section

Your About section is an opportunity to share who you are, and how you help your Clients. Think of this section as your miniature biography. Lead with a strong opening about your current role and passion for doing it. Share some history about your career and your accomplishments to reinforce your credibility.

Experience

Use this section to highlight your past work experience. Rather than stating just what you were responsible for, explain what you accomplished and what skills you used to do that. Where possible, link the job to the existing Company Page on LinkedIn.

Education

This section is to highlight your education. Stick to any post-secondary education that is relevant to your designation as an advisor, or to the Clients and communities that you serve.

Volunteer Experience

Indicate any volunteer involvement to bring your Profile to life. It shows your network what you value and how you're contributing to the community. It rounds out your Profile by highlighting a personal side of you while remaining professional.

LinkedIn is a professional network. Highlight the experiences, qualifications, and personal values that support your unique professional brand. Consider what information potential Clients may be looking for, as well what other professionals might expect to see.

COMPANY PAGE

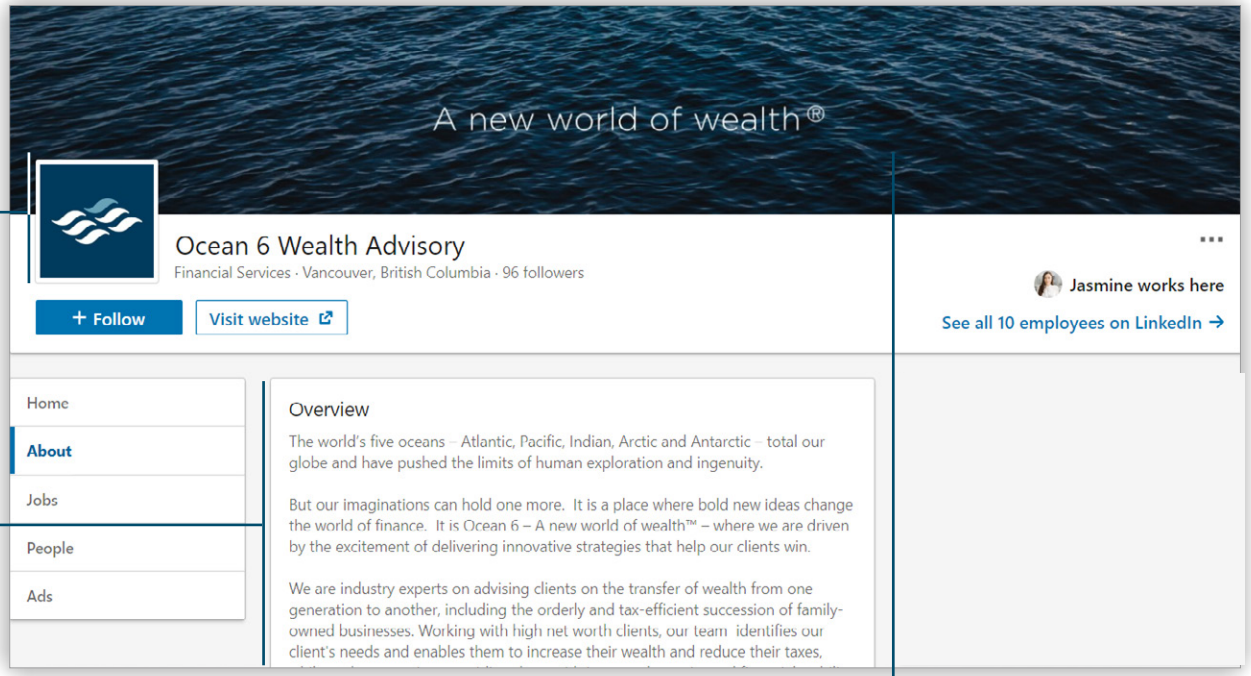
Your Company Page brings credibility to your practice. It allows you to demonstrate the collective expertise of your team and connect with employees and potential Clients. This page will appear in internet search results, so take advantage of the opportunity to get noticed.

Picture

Use your logo for your image. This will show up whenever you post or comment, so it's a great way to bring awareness and recognition to your brand. According to LinkedIn's guide for small businesses, companies with logos on their page get 6x more visits.[1]

Overview

Craft a compelling description that will generate good search engine results. Lead with powerful copy that uses many keywords. Speak to who you serve, what solutions you can provide, and what makes your process unique. If the company's licensing province requires you to use certain titles, make sure you include them here.



Cover Photo

Your cover photo can be a photo of your team, your office, the city you serve, or another visual element that aligns with your brand.

Set up your Company Page as a micro-site for your business to set yourself apart from competitors. Include some of your marketing collateral and a clear call to action to redirect visitors to your main website. To further enhance your credibility, link your Company Page to your personal Profile.

Company Information

Include your website, location, and phone number so visitors to your page know how to contact you. You should also specify that you are in the Financial Services industry, and provide details about your company size.

[1] LinkedIn, Small Business Owner's Guide

SETTINGS & PRIVACY

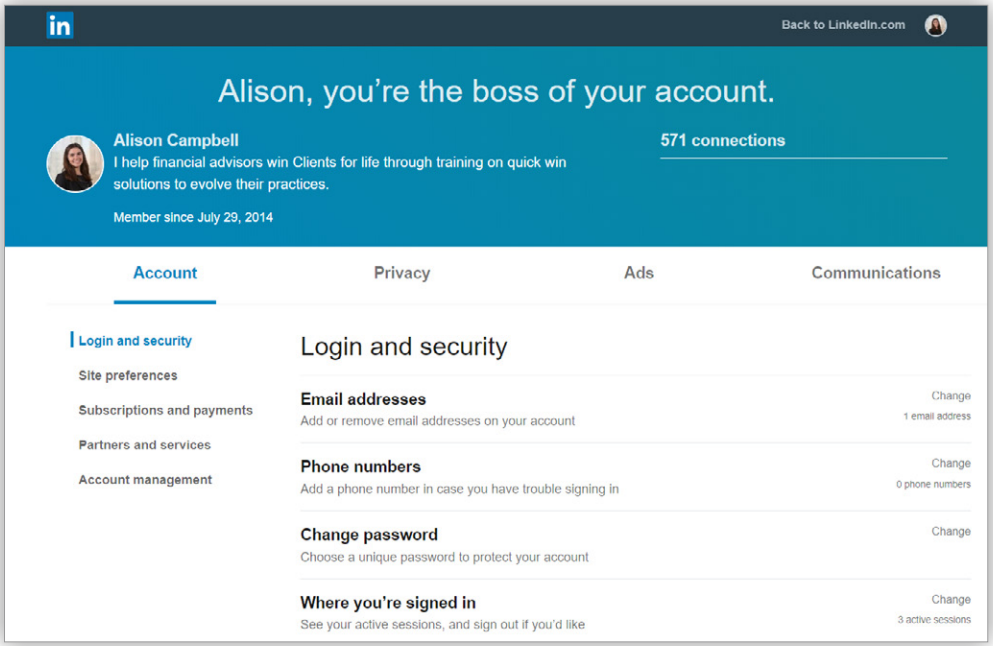
You control how you access your account, who can view certain parts of your Profile, the types of advertisements you see, and what notifications you get from LinkedIn.

Account

Under Account Settings, you can adjust your email, password, and other login settings. You can also update the language of the site, and some of the content that's shared in your feed on the homepage. Here, you can upgrade to a paid LinkedIn subscription, such as Premium Business for access to advanced analytics and connection opportunities.

Privacy

Privacy settings let you control who sees your Profile and activity. It allows you to monitor how LinkedIn uses and stores your data, and it lets you manage any blocked followers. If you don't want people to know that you've looked at their Profile, you can change your settings accordingly.



Ads

LinkedIn uses information from your Profile to show you ads that might interest you. You can specify what those interests are, or remove LinkedIn's permission to use your data that way. You will still see the same number of ads, but they may not be as relevant.

Communications

Your communications settings let you choose what notifications you get, and how you receive them. You can also decide who is allowed to send you a connection request or message. Lastly, you can change the settings of your Messaging feature to optimize your experience.

LinkedIn allows you to connect with Clients, and extend beyond your network to promote your brand and nurture leads. While you want to protect your privacy and not get flooded by notifications, you also want to be welcoming and responsive to people who engage with you.

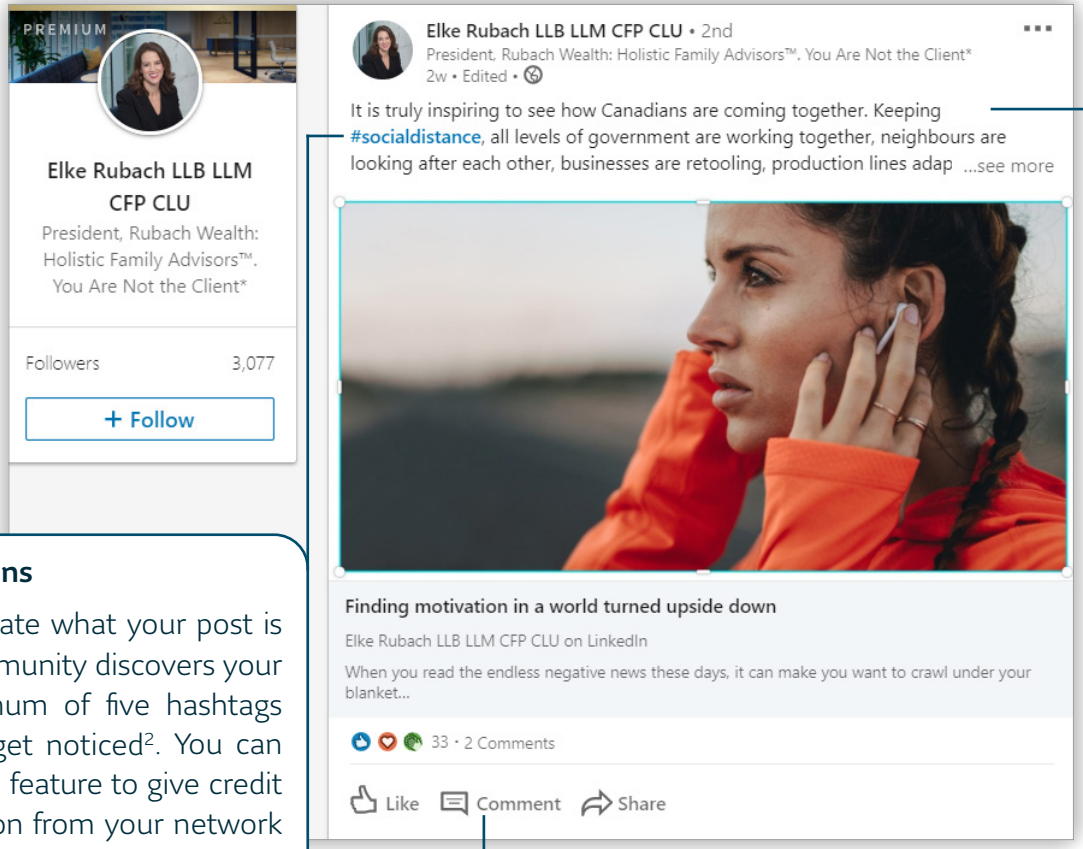
Build

Build your presence and reach by engaging with your network and using LinkedIn's advanced Profile features

We Help. You Grow.

ENGAGE YOUR NETWORK

While your Profile provides visibility, your content and activity will keep you top of mind across your network. Create and share content for your network on both your personal Profile and Company Page. Don't forget to always give credit where credit is due.



Post

Write short posts of your own and share content from other sources. You can post about company news, industry articles, thought-leadership pieces, videos, photos, and links to other content. If the content is not your own, include a link to the source and provide your commentary in the post. You want to start conversations online, not sales pitches. If you post company-related news or product announcements, make sure they deliver a specific benefit to your followers. Reminder: for longer updates, publish an article instead of a post.

Hashtags and Mentions

Use #hashtags to indicate what your post is about so the right community discovers your content. Use a maximum of five hashtags to help your content get noticed[2]. You can also use the @mention feature to give credit and tag a specific person from your network in your post. For example, "@Mary Smith on my team published this great article about estate planning. #financialplanning #financialadvisor #estateplanning #legacy #familyfuture."

Like, Share, and Comment

Participate in social listening and show your network that you are interested in their content too. Like, share, and comment on their posts and provide your professional perspective. Be strategic in how you engage because all of the content you engage with will populate on your connections' newsfeed. You want to position yourself as an expert and credible source of information on different industry topics.

[2] Hootsuite, The Complete Guide to Using LinkedIn Hashtags, 2018

By posting content to your personal Profile and Company Page, you can interact with your network and have a two-way conversation. You can ask questions to start conversations, and receive feedback through likes, comments, and shares. Depending on what you choose to engage with and how you engage, you can position yourself as a thought-leader on industry topics.

Publish Articles

Share your professional expertise, authentic experiences, and personal anecdotes through publishing an article. Pick a topic that your network and potential Clients would gain value from reading. The ideal length of an article is 500–1000 words.[3] You can also use the Content Suggestion feature for a better idea of what content to post by filtering for audience, industry, location, and more. Articles remain on your profile indefinitely under the Articles section. In addition, if your profile is public, your article will appear in Internet search results whereas a post would not.[4]

Share Documents

You can post PDFs, slides, reports, or other information-rich files as a document from your computer. Use this format to teach your network something new or to release business and industry updates. When you share a document, include an eye-catching cover slide and ask questions to encourage conversation in the comments.

Amplify

Based on your strategy and company set-up, determine what kind of content to post on your personal Profile versus your Company Page. After you post on one page, share the post from that page to the other one to attract more attention. A best practice is to post 2-5 times per week. However, every post should provide value to your network, so determine the frequency you can commit to.[5] Social media management platforms like Loomly or Hootsuite can help keep to your schedule by automatically releasing planned posts throughout the day, week, or month.

[3] LinkedIn, Best Practices for Posting on LinkedIn
[4] LinkedIn Help, Publish Articles on LinkedIn, 2020
[5] LeBlanc, Sarah, How Often Should You Post? 2018

ENHANCE YOUR PROFILE

Stand out among the rest. When people look at your Profile it should speak volumes about you and your business. Your LinkedIn Profile and Company Page need to be dynamic, not static.

Skills, recommendations, and accomplishments provide evidence of your credibility and expertise. Be strategic about who your recommendations are from based on the centres of influence you're trying to attract. Share accomplishments that are recognized by peers in your industry and potential Clients. The more details you provide, the more trustworthy your Profile is.

Skills

Maintaining a relevant list of skills on your Profile will help others understand your strengths and match you with the right opportunities. Skills with the most endorsements are listed first, and skills without endorsements are displayed according to the date they were added. Only include your top skills. Anything more is overwhelming and irrelevant.

Recommendations

Ask for recommendations from Clients who can speak credibly about your abilities and contributions. Prospects will look at your recommendations as part of conducting research and forming an opinion. You should have at least five recommendations to show credibility and gain interest.

Accomplishments

List all of your business certifications and awards in this section. Mention if you have been named "Small Business of the Year," if you are part of The Premier Association of Financial Professionals®, or other relevant accomplishments.

Cultivate

Grow your network and your business by driving traffic to your online presence and nurturing leads.

We Help. You Grow.

GROW YOUR NETWORK

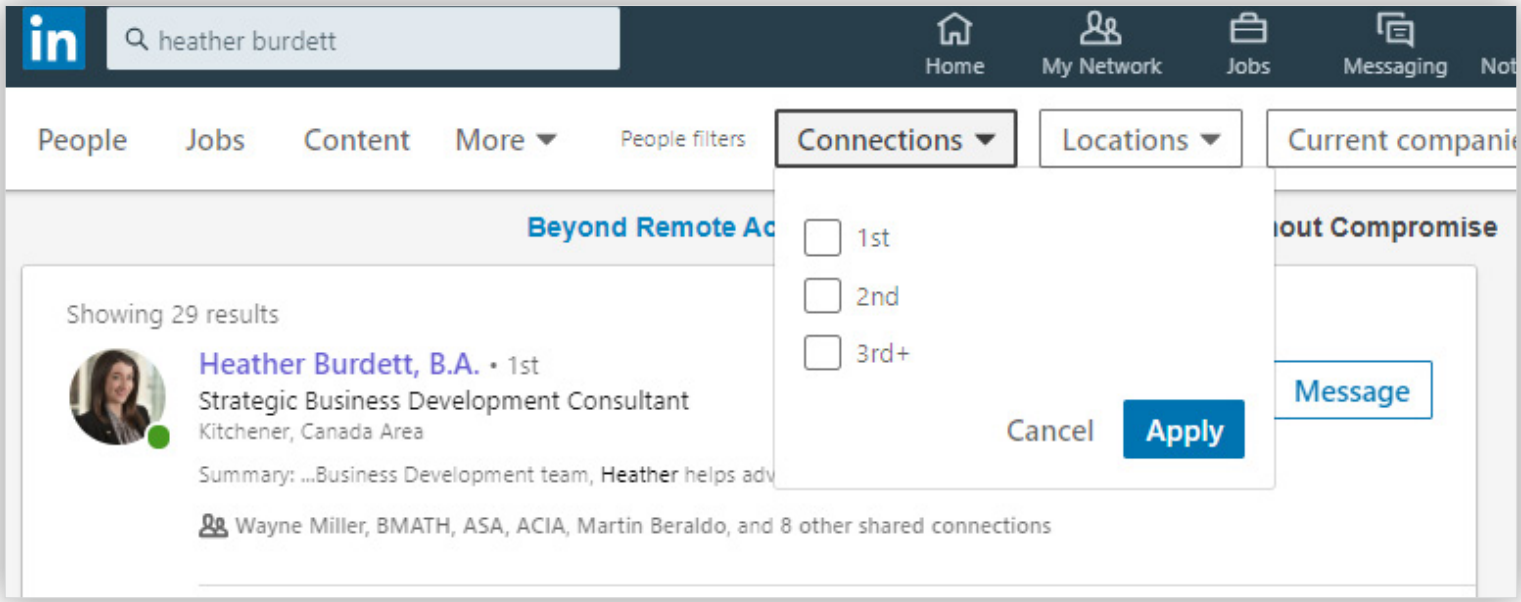
Now that you've built a strong presence and robust Profile, it's time to level up. Use your credibility to grow your network. As a result, your business will grow too. There are over 530 million professionals on LinkedIn – get out there!

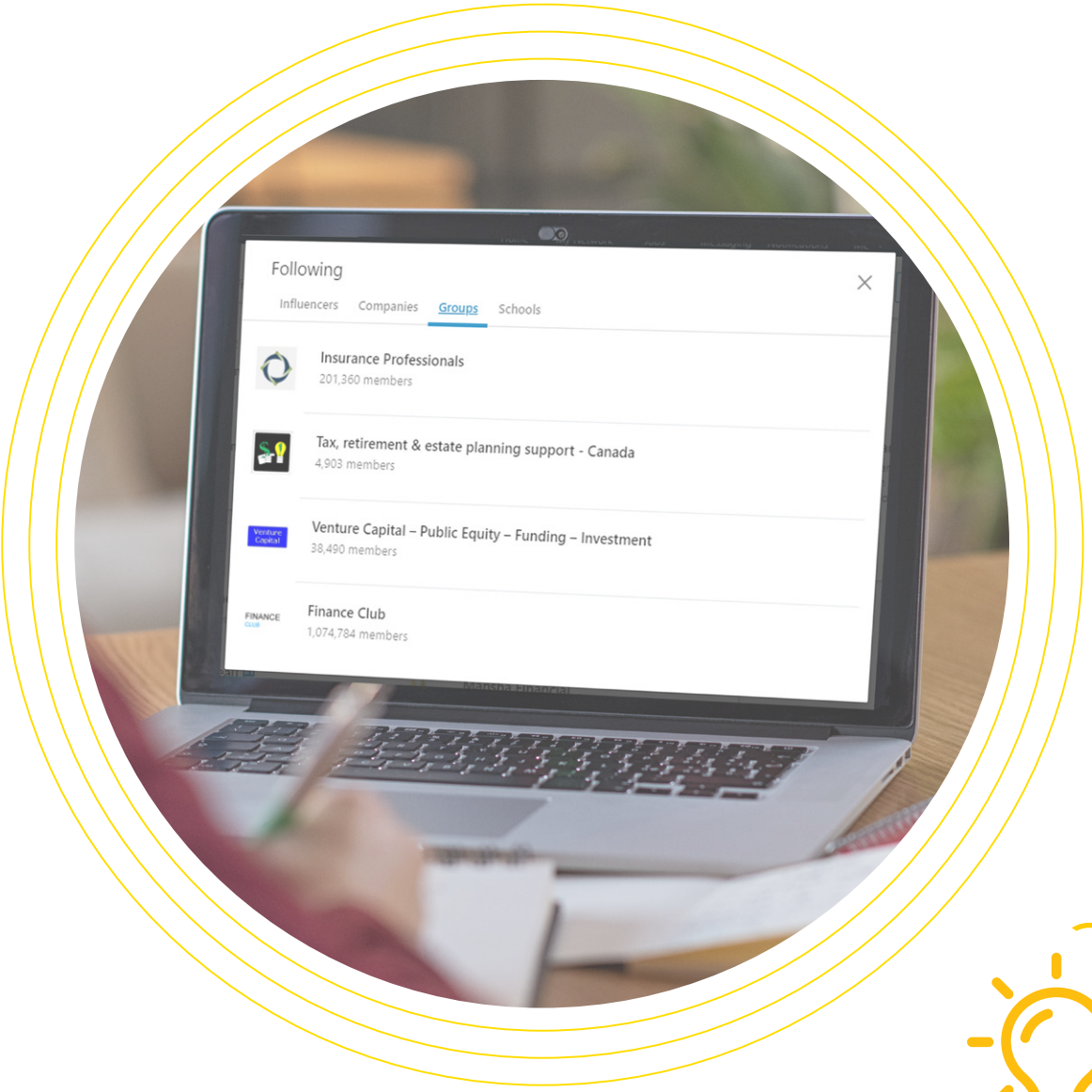
Search

Use the search bar to find more of your colleagues and contacts that might help you achieve your goals. Open "All filters" in the search bar to refine your search and find a connection in a particular industry, from a specific school, or with a certain level of experience. You can also check the "My Network" tab to see suggestions of people you may know as well.

Connection Requests

This is an opportunity for you to make connections and grow your network. Remember, you are responsible for following Canada's Anti-Spam Legislation (CASL). Here's a link to **frequently asked questions.**





Following

Following allows you to see someone's posts and articles without being connected. Seek out experts, industry leaders, or companies that are relevant to your business goals and specialization. Interacting with their content when it appears in your feed is a great way to help your business surface.

Groups

Groups are private communities built around a common interest, industry, or job function. Join a group to connect with other like-minded business leaders. Participate in conversations to learn from your peers, and share your professional expertise and opinion. In addition, Groups appear under the Interests section on your Profile. This shows your connections what is important to you and influences what appears in your feed.

On LinkedIn your network speaks to who you are as a professional, and how you conduct business. Engage strategically to get in front of your ideal Client and strengthen your brand image within the industry.

DRIVE TRAFFIC

Your LinkedIn Profile acts as a great springboard. Not only does it work to define your brand and promote your business, but it points your audience in the right direction with next steps.

Custom Button

Use the Custom Button feature to drive visitors where you want them to go, depending on your objective. Custom Button options include: visit website, contact us, learn more, sign up, or register.

Follow Button

Create a Follow Button that links to your Profile so visitors can access your page in one click. Add the Follow Button to your email signature, newsletters, blogs, and other marketing channels to drive traffic to your page.

LinkedIn Ads

Run LinkedIn Ads to increase visibility and promote your services. Reach highly targeted audiences using Sponsored Content, LinkedIn's premier ad format. This will increase your brand awareness, generate quality leads, and help you gain followers. Remember, you cannot solicit or sell insurance or investments outside of Canada or beyond the provincial jurisdictions you're licensed or registered in, or give advice or recommendations through social media.

Featured Section

Add the Featured section to your Profile. Unlike your Activity section, what you pin here will stay front and centre on your Profile. Add posts, articles, web links, and other media that you want visitors to notice and engage with first.

Once you've built your LinkedIn presence, you can use it to build brand awareness and generate leads. Use LinkedIn's advanced features to drive traffic to your LinkedIn page, and then present a call to action to turn viewers into prospects, and prospects into Clients.

SEARCH ENGINE OPTIMIZATION (SEO)

Search engines scan the internet and rank the most relevant results. Rankings are based on elements like the text, the web address, and the images on the site. Search engine optimization (SEO) is a strategy to move your site up in the ranks. The following techniques will improve the SEO results of your Profile and Company Page.

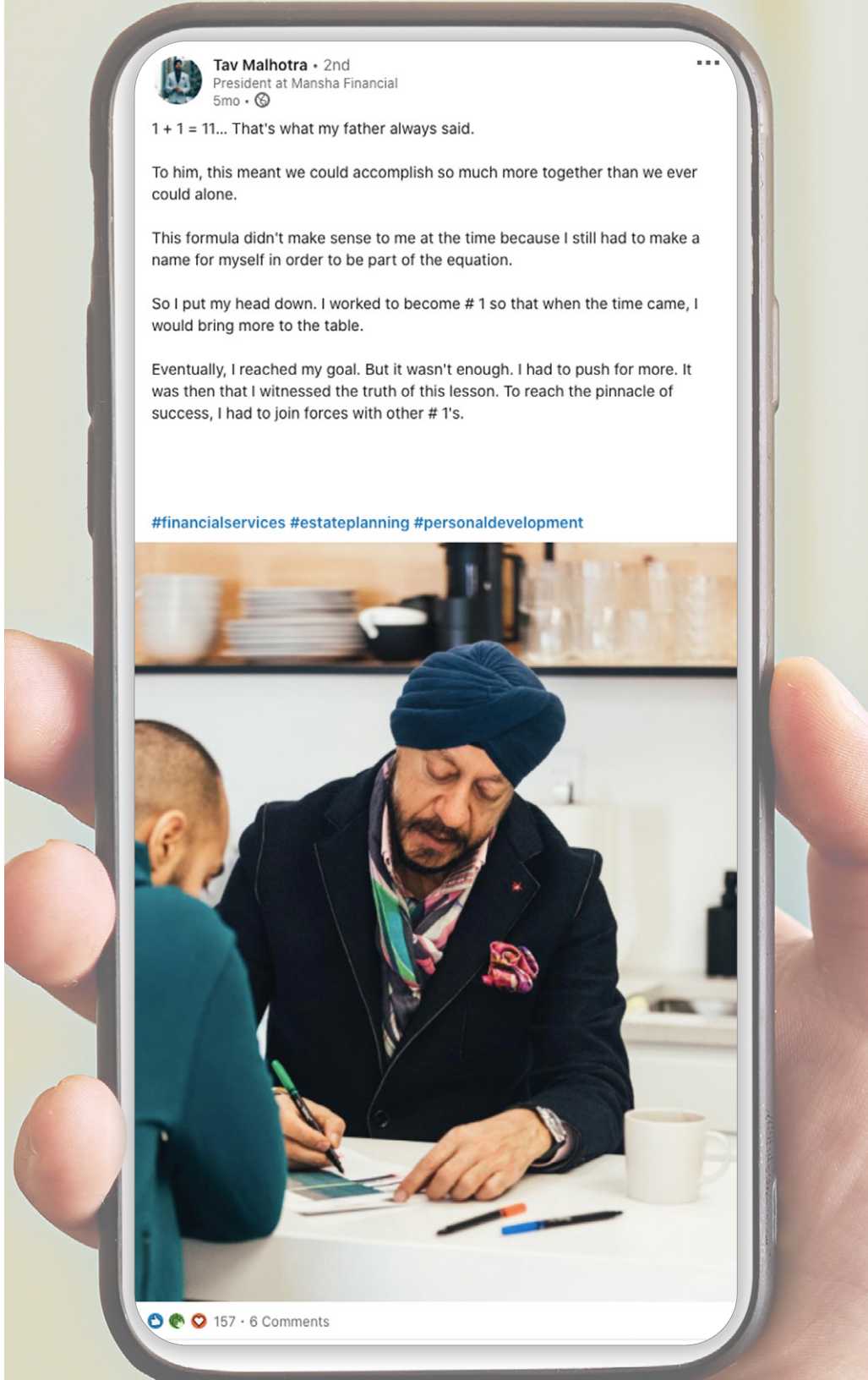
Keywords

Use powerful keywords and rich copy related to your industry, expertise, and Client solutions across your entire LinkedIn Profile, including posts. This is especially important for your About section and the description on your Company Page. Both your Name and Headline should include keywords as well because Google previews up to 156 characters of text from your LinkedIn Profile or Company Page.

Photos

All photos you post to LinkedIn, even your Profile photo and cover image, should be named and saved with SEO in mind. Using keywords or even your own name in the file name will drive traffic to your Profile and pull better results when someone searches for a post.

We Help. You Grow.



Hashtags

Using a #hashtag indicates what your post is about and will help your content get discovered. You want to keep hashtags to a minimum. Use a maximum of five hashtags to help your content get noticed.[6] Consider the objective behind your post to determine what hashtags to use.

Updates

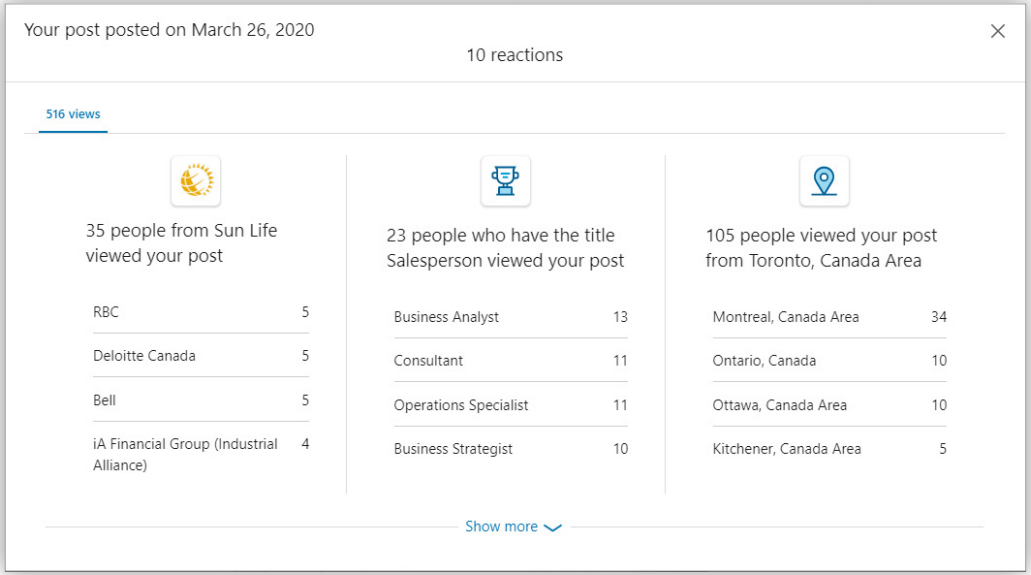
Make regular updates to your Profile and Company Page. Fresh, consistent content is indexed and sends signals to the search engine that your page is active and engaging with followers. If you want to be found, make updates to your Profile at least once a quarter, and include the keywords that are top of mind in the industry.

The closer your LinkedIn Profile and Company Page are to the top of search engine results, the more visibility you will have. SEO techniques will help you climb the list and drive traffic to your pages. Apply them when writing content and engaging with your network.

[6] Hootsuite, The Complete Guide to Using LinkedIn Hashtags, 2018

MEASURE RESULTS

Your activity on LinkedIn should be in support of your objective and should reach your target network. Use LinkedIn's analytics capabilities to measure your progress in doing so.



Use your results to create more content that receives the best response with your target audience, based on your objectives. Which topics appeal to your audience, what day of the week do you get the most responses, and which calls to action have the best engagement? Let the data be your guide to getting the most benefit from the effort you put in.

Profile Dashboard

Your Dashboard lets you know how your Profile is performing. It tells you who has viewed it, how many views your most recent post got, and how many times your name has appeared in a search. When you click on these statistics, you can see who was engaging with your Profile and which industry, company, and location they are from.

Company Page Analytics

In your Page Admin Center, you can view the results of your updates and videos. LinkedIn measures impressions, clicks, reactions, and more. Visitor analytics also let you monitor your page views by date, channel, and job function to make sure you're reaching the right audience.

Social Listening

Track, analyze, and respond to different conversations happening across LinkedIn related to your brand and industry. Metrics include brand mentions, relevant hashtags, competitor mentions, and industry trends. Look beyond the numbers and consider the tone of the content. Use this information to uncover key insights about your target market and adapt how you engage.

Final Overview

Through LinkedIn, you can engage in two-way communication with your industry, Clients, and prospects. Start by activating your presence. Create a strong LinkedIn Profile and Company Page that demonstrates what sets you apart from other advisors. Next, build your presence and demonstrate your expertise by being strategic in the content you share and engage with. Finally, get the most from LinkedIn by cultivating your results to grow your business. Expand your network, improve your visibility, and ensure you're reaching the right audience. Millions of professionals use LinkedIn every day. If you're left out, you risk being left behind.

We Help. You Grow.

LINKEDIN CHECKLIST

Use this checklist to quickly confirm that you've hit all the necessary requirements for setting up your LinkedIn Profile and Company Page. These points summarize the key value drivers of a LinkedIn presence.

Activate

Profile Page

- [ ] **Headshot**
  is professional
- [ ] **Cover photo**
  represents your personal brand
- [ ] **Headline**
  provides a quick description of what you do
- [ ] **Experience**
  supports your credibility and knowledge

Company Page

- [ ] **Logo**
  is visible in photo
- [ ] **Contact**
  information is up-to-date
- [ ] **Description**
  articulates what differentiates your brand and business process

Build

- [ ] **Create content**
  that you will share with your network
- [ ] **Accomplishments**
  include all business certifications and awards
- [ ] **Recommendations**
  speak to your abilities and contributions
- [ ] **Skills**
  are identified to highlight your strengths

Cultivate

- [ ] **Custom Button**
  activated to drive traffic depending on your objective
- [ ] **Follow Button**
  created so visitors can access your page quickly
- [ ] **Featured section**
  includes pinned posts, articles, and web links to showcase your work
- [ ] **Keywords**
  used in Headline, About section, and Company Page description
- [ ] **Photos**
  named and saved with SEO keywords in mind
- [ ] **Updated information**
  on your Profile and Company Page to show page is active

ACTION PLAN

Reference this action plan and schedule time in your calendar to best implement your LinkedIn strategy.

	Activate	Build	Cultivate
Frequency	**One Time**	**30 minutes / week**	**1 hour / month**
Actions	• Set up Profile • Set up Company Page • Adjust privacy & notification settings	• Like 3 posts • Comment on 3 posts • Publish one resource, article, or upload a document • Use #hashtags and @mentions in posts and comments • Participate in social listening and respond to messages and comments	• Update Profile keywords • Pin top activity to Featured section of Profile • Review Profile Dashboard & Company Page Analytics • Follow industry leaders and companies you admire • Connect with potential prospects and partners • Participate in industry-related groups • Post a LinkedIn Ad for your Company Page
Impact	Be visible on LinkedIn.	Demonstrate your expertise and engage with your network.	Measure your results and adapt your strategy to grow your business.

We Help. You Grow.

These strategies have been prepared by the Practice Management team at Sun Life — a team dedicated to the growth of your business. For more strategies to grow your practice, connect with your Sun Life relationship manager or visit sunlife.ca/advisorbestpractices.

Sun Life

Sun Life Assurance Company of Canada is a member of the Sun Life group of companies.
© Sun Life Assurance Company of Canada, 2020.

810-4987-05-2020