

Leveraging Social Media

This course is designed to help you get your name and your firm name out into the public eye through social media more often and in a powerful and attractive way. By the end of the course, you'll know exactly why social media is such a powerful tool to leverage and how you can start utilizing it now to build your business.

Overview:

Are you on a mission to serve even more people with your talents and expertise as a financial advisor? If yes, then you need even more people to know who you are. You've probably heard the saying, "Sales is a numbers game." This is true. Surely you can agree that meeting even more people and helping them to know who you are and what you and your firm are all about would drastically increase your chances of meeting more people who could be ideal clients. And, if you can meet more people who could be ideal clients, you'll best position yourself to grow your business faster!

What's holding you back from introducing yourself and your firm to even more people? If you're like most advisors who are running on all cylinders, your obstacle is time.

What if there was a way you could spend less than 30 minutes every day and build relationships with dozens, hundreds, or even thousands of people who could be potential clients? Would you be interested in learning about that?

Unlike Big Foot, it exists. It's called social media. Have you heard of it? Of course, you have. There's no getting away from it!

You've likely even had the conversation—likely in your own head—about getting more active on social media and creating content that attracts people to you and your firm.

What's stopping you?

Likely, lack of understanding.

That's the purpose of this lesson. You're going to learn how to leverage your time and resources by using social media to share more about who you are, what your firm is about, and how you help people. This will enable you to reach and build relationships with more people in less time than any other strategy for relationship building.

The point of social media is to show people who you are. And you must realize that it's called SOCIAL media. Through this lesson, you'll realize the power of being social on social media. And you'll have your own game plan to execute for using social media to build your brand and your business.

At a high level, it only takes a handful of simple steps to leverage social media:

- **Step 1:** Commit to leveraging social media—this isn't something you'll be successful with if you simply dabble in it occasionally
- **Step 2:** Choose the platforms you'll spend time leveraging
- **Step 3:** Set up your personal and business profiles
- **Step 4:** Create your game plan (decide how often you'll post, which platforms you'll post on, when you'll post, what overarching themes you'll talk about in your content that will reflect the brand you want to build and show people)
- **Step 5:** Enlist help from your team
- **Step 6:** Get social!

If you've been on the fence about leveraging social media to build your personal brand and your business, dive into this lesson with an open-mind and a willingness to explore a new way to grow your business. Once you start leveraging social media and experiencing the benefits, you may fall in love with this new growth strategy.

Step 1: Commit to Leveraging Social Media

You've likely decided to spend time in this lesson for one of two reasons:

1. You've been considering getting into social media—either for a while or more recently—and you haven't yet done anything with it.

Or

2. You've started dabbling in social media and creating some content occasionally and have not yet fully committed to executing a well-thought-out game plan.

Good! It's great that you're considering social media. It can become one of your greatest assets for

introducing yourself, your team, and your services to even more people who could possibly benefit from what you do.

If you post a message on Twitter showing your team out volunteering in your community and four people “Like” your post—when someone “Likes” your post on Twitter or other platforms, it means they hit a button below your post (either a heart or thumbs up icon) to indicate they like your post and find it valuable in some way—would you find this post to be “successful”?

What if one of the people who “Liked” the post is an executive of a company in your area who you serve with on a non-profit organization’s board in your community? Let’s assume this person isn’t a client. She didn’t attend the event you volunteered at; so, she wouldn’t have seen you there.

Yet, you were still able to grab her attention and put your name and your firm’s name in front of her. Now, she’s thought about you at least once more than she would have if you didn’t post that photo on Twitter. And how long did that take you? Maybe it took 2 minutes to get the whole team together and ask someone at the volunteer event to snap a photo of your group. And it took another 2 minutes to write the caption, “Our team enjoyed spending time at XYZ event today volunteering to help support their mission to (input the group’s service mission you were supporting)”, and then send it out to your followers—the people who have elected to see your posts in their feed (the place where posts show up for others to view).

All of this took less than 5 minutes, and you gave yourself the opportunity to be in front of, be thought of by, and further build a relationship with someone who could be a client for you at some point.

Take this process out over a full year. Imagine you’ve been posting and engaging regularly on social media and now you get 10 – 20 (or more!) “Likes” and comments on your posts. And 4-5 of these people are people you’d love to have as clients! You’re making progress. It doesn’t feel like much, but success with social media takes time.

Unless you’re going to spend a lot of money on advertising and promoting your posts and running ads on social media (which is certainly something you can do), getting your time, energy, and effort spent on social media to pay off takes time—it can even take years!

Like any other prospecting and business development strategy, for the people who are willing to put in the time, effort, and energy consistently, leveraging social media can help you reap some amazing rewards. What is the difference between most other prospecting activities and leveraging social media? Social media is *massively* scalable! The more time and effort you put in over a long period of time, the greater the potential reward from social media.

By the way, you may have heard of the “Rule of 7” in marketing—that a potential “buyer” (prospect) needs to encounter your message 7 times before buying (or deciding to hire you). The “Rule of 7” has been around for decades. I’m sure you can imagine that with people seeing significantly more content and messages than a few decades ago, this “Rule of 7” could easily be doubled (or even tripled) at this point.

This means you need to get your name and/or your firm’s name and message in front of people potentially more than 14 times before they’ll ever decide to do business with you. How can you get your name in front of more people more often in less time? Create content and share it on social media.

By the way, leveraging social media is not just about prospecting and new business development. Social media is a fantastic way to stay top of mind with your existing clients. By creating and sharing content about you and your firm, you’ll connect more often and build deeper relationships with your existing clients. By showing your clients more about you and your firm, you invite them into a deeper relationship. They’ll get to know you better. And they’ll begin to feel even more comfortable with you and your firm which can lead to deeper trust. At the end of the day, one of your most important jobs as a financial advisor is helping your clients feel a sense of peace and confidence with their personal financial wellness. And, very often, this peace of mind and confidence with their personal financial wellness starts with trusting the advisor who helps them—you, in this case.

Whether you choose to use Facebook, Twitter, Instagram, LinkedIn, YouTube, TikTok, a podcast, some of these or all of these, you can expand your reach and save yourself time in your business development and marketing efforts, *and* you can deepen and strengthen the relationships you have with your existing clients.

Are you excited yet to leverage social media?

Several viable options exist for where you could spend time creating and sharing content and engaging with other people on social media. The more of these platforms (“platform” is a general term referring to the different social media outlets) that you use, the greater number of people you can potentially reach.

In the next lesson, we’ll review each of the major platforms that successful advisors leverage, and you’ll have the chance to choose which one or ones you’re going to commit to leveraging first.

Check Your Understanding

Question: What will leveraging social media do for you and your firm? (Select all that apply.)

- Become known by more people
- Build relationships with clients and prospects

- Add value to the lives of people who see your content
- Help you grow your business faster

Answer: All should be selected.

Step 2: Choose Your Platforms

I'm sure you've heard of all the major social media platforms. Here's the list:

- **Facebook**
- **Twitter**
- **LinkedIn**
- **Instagram**
- **YouTube**
- **TikTok**

Hopefully, you're convinced enough that social media could be a great new tool for you to leverage to help get your message and your firm's name in front of more people that you're now asking the question, "Which platform should I start creating content on?"

Great question! First, consider this Tony Robbins quote: "Complexity is the enemy of execution."

Certainly, you've experienced this in your own life and business. You've thought of many great ideas and different strategies and plans you want to execute on. And you created some elaborate plans. Then, nothing. Nothing happened. Why? Because you put *way* too much onto your plate. (By the way, if this is something you're struggling with, check out the lesson on productivity and [time management](#))

Execution of a plan, strategy, or idea is the only thing that will create results. If you want to increase the probability of executing your plan for leveraging social media, keep it simple.

In order to keep it simple choose one or two platforms to start using and learn how to effectively leverage those selected platforms. Once you've gained great understanding and traction with one or two platforms, then consider adding in one or two more.

Don't just decide right now that you're going to create content on *every* platform—that's a recipe that could lead to more stress than actual execution. To be sure, at some point, you may very well be

leveraging every social media platform. For now, let's choose one or two to begin with.

Let's review the 6 platforms listed above.

Facebook

Facebook is a staple for many financial advisors who are successfully creating content on social media. Of all the social media platforms, Facebook tends to have more users in the demographic that's close to or in retirement years. Therefore, many financial advisors like to use Facebook because they're more likely to reach their target demographic (if their ideal client is someone in or nearing retirement). Additionally, Facebook is very personal. People tend to do best on Facebook when sharing content (again, content means the stuff you're posting—video, text, photos, and audio) that's personal.

Twitter

Twitter is a great place for sharing short quotes and perspectives on a given situation (personal or business). You can also share photos and shorter videos (as of now, videos must be under two minutes and twenty seconds).

LinkedIn

LinkedIn is not just for business talk and resumes. It has become much more personal and intimate. Meaning, LinkedIn users are talking more about personal life and sharing their personal opinions and perspectives on events and experiences in the world. Statistically speaking, LinkedIn is full of users who are high income and executive leadership level type people.

Instagram

You might initially think of Instagram as the place for professional photographers to exhibit their beautiful, professional photos. This is true. It's not the only thing happening here, though. More and more, Instagram is becoming a place to share your truth in a very vulnerable, authentic, and personal way through photos, text images, and videos.

YouTube

YouTube is the place to create longer-form videos. Some of the platforms above, you can create longer-form videos. (Although there isn't a specific length that constitutes "long-form", for this lesson, let's say long-form is a video of five minutes or longer.) YouTube is the go-to place for people who want to consume (view) long-form videos. On other social media platforms, it's difficult to grab and keep attention for longer than a couple of minutes with video (though, possible!). If you want to create longer, more in-depth videos, YouTube should be one of the platforms you choose to leverage.

TikTok

Although TikTok is a newer platform than the others listed above, it is quickly gaining traction as a place that more people are putting their time and attention. We would be remiss to not at least mention TikTok is worth checking out and potentially leveraging as a place to publish your own content.

Activity/Check Your Understanding: Spend 10-20 minutes every day for the next 7 days just consuming (viewing) content (posts) on the social media platforms that you're most interested in creating your own content on. See what other people are doing. See how other people are using it. This doesn't mean you should do *exactly* what other people are doing. And it doesn't mean you can't do something totally different! By spending time on the platform, you'll begin to feel more empowered and confident because you'll gradually start to better understand and feel comfortable with the platform. After spending some time observing on the platforms, decide which one or two you want to begin leveraging.

Step 3: Set up your personal and business profiles

Which one or two platforms did you choose? How are you feeling about them? Hopefully you're excited to move forward with your commitment to leverage social media to grow your brand and your business!

Now that you've decided which platforms to leverage, you need to establish your profile on each. (On LinkedIn and Facebook, the "profile" for a business or organization is referred to as a "Page".)

Your immediate question might be, "Do I set up a page for my business or a profile for myself as an individual?" The answer is yes. Both can be important for your overall strategy for leveraging social media. Going back to the concept of keeping it simple, the first one you should establish and use is a personal profile. However, before setting up any profiles, make sure to check with your compliance team to ensure you're following rules and guidelines they've established.

Most people pay more attention to personal profiles than business pages because they feel more relatable and engaging. People get on social media to engage with other people. At some point, you certainly can (and should) set up a business page on each of the platforms you choose to use. First, let's start with a personal profile.

Your immediate action items are to use the setup guides and templates for the platforms you've selected and get to work creating your profiles. Once that's done, move on to the next lesson to develop your game plan for creating and posting engaging content.

Step 4: Create Your Game Plan

You've committed to leveraging social media. You've decided which one or two platforms you'll start leveraging. And you've established your profile(s) on each. Now, you're ready to prepare to execute an outstanding content creation strategy.

In this lesson, you'll make decisions on how often you'll post, when you'll post, what topics you'll cover, and what types of content you'll create (video, photo, text, audio).

Once you finish working through this lesson, you'll be able to create your own Social Media Calendar.

Leaving your social media strategy to randomness and happenstance will prevent you from maximizing the effectiveness of social media as a powerful tool. Therefore, this lesson is vital for your success with leveraging social media. And, yes, creating a social media calendar can set you up for even greater results because it will keep you focused and accountable.

When should you post?

This is the age-old question. People want to know the *exact* right time to post on social media for maximum exposure to their audience. Is it Tuesday at 9:07am? Or Thursday at 3:17PM? If you're just starting with social media, this should not be a question you address right now. At some point, it can absolutely be a helpful ingredient to your social media success. However, too many people use this and other minutiae about social media strategy as reasons to stay stuck and not execute.

Additionally, you'll likely learn, over time, the best times for *you* and *your target audience*. Everyone is different. The more important question for you to answer now? "When is the exact right time for me to post on social media given my overall business strategy and game plan?"

Remember that social media is one piece of your overall business. Don't make your business fit into your social media strategy. Make your social media strategy fit into your business.

Does it work best for you to post at 6:30am before you leave for the office? Does it make more sense for you to post at lunchtime because that's when you're not focused on everything else going on? Or, are you the type of person who wants to finish the day of work and post before you head home for the day?

Decide what time is best for you and stick to it.

Now, you might be asking, "So, I need to post every day?"

Let's address this for a moment.

Do you *need* to post every day? Not necessarily. You'll speed up the rate of the results you experience

from leveraging social media if you're willing to create and publish content every day on the platforms you choose to be active on. However, if you're just starting to leverage social media, it could make more sense for you to commit to a less frequent posting schedule. Again, complexity is the enemy of execution. Ask yourself, "What's the frequency for creating and posting content that I can absolutely 100% commit to doing without missing?"

Maybe for you that's once per week. Maybe that's every Monday, Wednesday, and Friday. Maybe that's every Tuesday and Thursday. Regardless of whether you post every day or once per week, the most important thing you can do now is to *get in the game!* If you're currently posting ZERO times per week, then once per week is a step in the right direction.

Once you become comfortable with creating content and posting on social media, you should gradually move towards posting at least once every day. And, by every day, I mean Monday through Friday. If you are ambitious and want to post seven days per week, great! Again, the more often you post, the more traction you will experience.

Some people might read this and say, "Well, I heard it's a bad strategy to post too many times in one day." Maybe. Some of the most followed and successful people on social media promulgate the idea that posting several times per day is the best strategy. For most people, the problem is *not* that they post too often. The challenge most people face with not getting more and better results from social media is that they don't post often enough, and they don't do it consistently. So instead of worrying if you're posting "too much", choose your frequency and follow through—whatever it is!

The biggest "key to success" for leveraging social media is consistency over a long period of time.

Once you've consistently executed on your Social Media Calendar (we'll discuss the Social Media Calendar later in the lesson) for at least one full month, revisit it and decide if you want to change your plan. Your plan does not have to be set in stone forever. It can change! But give it time. Don't stick to a plan for one or two weeks then scrap the plan because it's not "working."

Speaking of "working," it's vital to know how you'll measure success. Some people want to measure success of their social media strategy by the number of likes and comments and views each post receives. You might be the person who wants to measure success by the number of qualified prospect meetings you set due to people seeing your posts.

These are what we call Outcome Goals. When you're starting out with social media (or, even ramping up), the better type of goal to track your success is an Activity Goal. Why? Because success through leveraging social media can take time. If you're just starting to leverage social media and your goal is to land a new prospect every month from your posts, you may be disappointed and discouraged when you

don't immediately start bringing in new clients.

By setting Activity Goals for social media, you're giving yourself 100% control of the achievement of the goal. You'll either achieve it or you won't based on your decision to execute.

An example of an Activity Goal is to follow whatever Social Media Calendar you've created (you'll do this later in this lesson). Did you decide to post one per day every Monday, Wednesday, and Friday? That can be your Activity Goal! If you post every Monday, Wednesday, and Friday, you'll accomplish your Activity Goal. An Activity Goal is 100% up to you.

Keeping 100% control of your goal achievement for social media will increase your chances of hitting your goal every week and every month. And, by hitting your goal every week and every month with social media, you'll feel more motivated and committed to the strategy.

Let's say it again: Success with social media typically requires a long-term commitment. You must be ready to stay active for several months and even years in order to begin reaping what you sow.

Next, let's talk about your content. What topics will you post about? What format will you use?

Content Creation

Hopefully, you've worked through the Passion Prospecting lesson of this program. Passion Prospecting is about choosing passions (hobbies, activities, experiences) that you enjoy spending time thinking about, learning about, doing, and experiencing. And then you go out and do and experience those passions in ways that get you into community with other people who are passionate about what you're passionate about. This will allow you to build strong relationships with these individuals which can ultimately lead to them becoming clients.

Think of your social media content in a similar way. Many advisors feel they need to share market and economic updates on social media. They feel they *must* talk about financial planning, wealth management, and other topics that completely align with the services their firm provides. To be clear, if these are the topics you want to talk about regularly, great! There's not one right answer to social media content creation.

These are fantastic topics! In fact, for people to know what you do, it's important to incorporate these topics into your overall content creation strategy. (By the way, your "content creation strategy" is simply the plan you have for the topics you'll post about on the social media platforms that you use.)

Understand that people who follow you on social media want to get to know you as a person—not just what you do professionally.

It's likely you've heard the saying, "People do business with people they know, like, and trust." Or, if that phrase doesn't do it for you, remember this quote by the cofounder and long-time CEO of Southwest Airlines, Herb Kelleher:

The business of business is people.

What a great reminder. And this quote spans so many areas of business. What does this mean for your social media?

You're a person, and people who become clients want to connect with and do business with a person.

More simply put, show yourself first and foremost as a holistic person. On social media, it's OK and even encouraged to post about your family and personal experiences, interests, and adventures.

The more you invite followers (the people who follow you on social media) into learning about and seeing who you are as a person, the more rapport and connection you'll build with them. As you build more rapport and connection with your followers, you'll increase the chances of them wanting to do business with you—to become clients.

You likely have passions, hobbies, and interests that you love to talk about. What are those topics that, if you could, you'd spend your days reading about, learning about, and experiencing?

Maybe you love fishing. There are advisors who have built phenomenal businesses by focusing on professional anglers as their niche target market. They would likely create content on social media relating to this topic.

Maybe you enjoy cooking amazing meals for large groups of people. You can take photos and videos of yourself preparing these meals from start to finish and share these photos and videos on social media.

COACH TIP: Document, don't create. It can be difficult to think of enough content to fill out your entire social media calendar. Want an easy way to eliminate this challenge? Document. What does this mean? It means showing the journey of your personal and/or professional life through photos, videos, audio clips, and/or text posts. As an example, instead of thinking about what major economic topic is vital for a given day, take a photo of your team at the office during a team meeting and write about how you meet every morning to stay on the same page and ensure the best possible client experience for the people you serve.

Another example is to write a short post about something you experienced on your drive home from the office and share your perspective on it. Maybe you saw a vanity plate that says "NJOYIT" on a nice car

in the parking lot of the grocery store as you were walking in. You could take a photo of the plate on the car and post the photo and write, “This reminds me of why I do what I do. I love helping people feel less stressed about their financial life so they can enjoy their personal life.” Or, you could record a 60-second video of you saying the same thing while you’re walking into the store.

Speaking of document, don’t create, you could even take a photo of your filled-up grocery cart. If you’re a person who is passionate about eating healthfully, as an example, you can show all the fruits, vegetables, and other healthy items in your cart. And you can write a post mentioning how excited you are to make a healthy meal for your family that evening.

It’s very easy to allow yourself to overthink what content you’ll create. Keep it simple. Don’t overthink it. Just post! You’ll realize that the more often you post content, the more comfortable you’ll become with posting and sharing.

Posting on social media is a muscle or skill like any other. It takes regular repetition to strengthen and improve. Don’t worry about creating the most perfect and beautifully done content. Just create! And improve as you continue to create.

To help you brainstorm the topics you want to create content about, use the [Content Topics Brainstorm Exercise](#) document. This will help you decide what areas of your life and business you’ll focus on and create content about.

You might now be wondering, “Should I post photos, videos, text-only, or audio content?”

It’s great that you’re thinking this because we’ll now move into this topic.

The short way to answer this question is by asking another question:

Which of these mediums (photo, video, text, audio) do you feel most comfortable with right now?

Eventually, it will benefit your overall strategy and social media success to incorporate all these mediums.

Execution of a strategy is the only way to produce results. Whichever of these mediums you will follow through with consistently is the one you should use. Are you completely uncomfortable being on video but love to write? Make your posts text posts. Do you dislike typing or texting words but can easily and joyfully spout off your ideas verbally? Record yourself on video! Maybe you enjoy taking photos of your food, families, vacations, business operations, and other experiences. Then post photos and write a quick caption to explain what the photo is about.

Create Your *Social Media Calendar*

Now, let's put a specific plan in place! What gets scheduled, gets done. View the [Sample Social Media Calendar](#) to see what your Social Media Calendar might look like. Then, create your own!

You might notice the recurring themes on Mondays, Wednesdays, and Fridays in the **Sample Social Media Calendar**. Monday's theme is "Motivation Monday". Wednesday's theme is "Team Wednesday". Friday's theme is "Lifestyle Friday". You don't need themes for an effective social media calendar. The benefit of these themes is that they can prompt your thinking as you work to create content. It gives you a base to work from. Get creative with your themes if you choose to use them! Or, use the themes listed here as your starting point. You can always choose new themes next month.

Check Your Understanding:

- **Complete the Content Topics Brainstorm Exercise**
- **Complete your own Social Media Calendar.**

Step 5: Enlist Your Team

At this point, you might be thinking to yourself, "I want to leverage social media to build my brand and grow my business, but this seems like a full-time job! Must I do it alone?"

Some firms have a full-time social media expert on their marketing team (if the firm is large enough) who can assist with ensuring effective execution of the social media strategy.

If you don't have this person on your team, don't worry, you can still crush it with social media!

And, no, you still don't have to do it alone.

Even if your team includes you and one assistant, you can enlist your assistant's support in this process.

One way to leverage your assistant (or a different team member if you have a larger team) is to add posting to his or her responsibilities. Notice, we're not suggesting your assistant creates the content. He or she can post for you.

You can batch create your content so that in a one to two-hour period once per week, you create all the content you plan to post for the upcoming week or weeks. You can drop all the content into a shared Dropbox folder or some other shared drive. And, when it's time to post the content, your team member can pull it up, move it over to your social media profile, and share it.

There are pros and cons to everything. For some advisors, it's just as easy (if not easier) to simply spend the 10-15 minutes every day posting and sharing the content themselves.

We encourage you to not have anyone else create content on your behalf if it's for your personal profile. Why? Because it won't necessarily have your "tone" to it. It might not feel authentically you for your followers. To ensure your authentic self shines through in your posts, you should create the content yourself.

For your firm's business page, the content can be created and shared by other team members as this content doesn't specifically have to fully reveal your authentic self. It needs to reveal the authenticity and culture of your firm.

Other ways to enlist the support and help of your team:

- Have team members follow you on the platforms you're sharing content on and ask them to "Like", comment on, and share your posts. This will help ensure your posts reach a broader audience.
- Encourage your team members to be active on social media and have their own personal social media presence. And, when they post anything related to the firm, invite them to tag you in the post!
- Even if your team members aren't active on social media, invite them to take photos while at events, team retreats, and during different, fun things happening around your office. Ask them to share these photos with you with the expectation that you can use them for your social media.

As your firm grows (both in revenue and team member count), enlisting additional support for your social media strategy can allow you to create even more great content even more often. If *you* are really the only viable option right now for creating social media posts, make it happen! You are the best person to create content that authentically reflects who you are and the brand you want to build.

COACH TIP: (on-screen call out) It can be challenging to keep an active social presence without it taking over your day. Luckily, there are a number of online tools that allow you to streamline your social media management. Tools like Hootsuite allow you to schedule posts in advance, manage your social media calendar, track post engagement, and view "what's happening" across multiple social media platforms all in one place.

Now that you've created your proactive social media plan, move on to the next lesson to learn about engaging with your current and potential clients in a meaningful way.

Check Your Understanding: Identify which team members can help you with your social media strategy. Discuss with this person how you want him or her to help and support your social media game plan.

Step 6: Get Social

We can't finish the lesson on leveraging social media without talking about the most important aspect of a successful social media strategy. That's right, being *social*.

Too many people think they're going to be successful on social media by posting a few times a week. Posting content that you create is only one portion of the bigger picture strategy for leveraging social media.

You can't just post and "walk away." You need to post and engage! When someone comments on your post, reply to his or her comment. It seems so simple, but not enough people do it. Every social media platform, at its core, is a community of human beings looking for connection.

And, if someone makes a meaningful comment on one of your posts, don't just "Like" the comment and say, "Thanks!" Reply in a meaningful way! If you can start a discussion through one of your posts with another human, you've struck gold!

Think about it like this:

If you were at an in-person networking event and you gave the keynote speech to start the event about holistic wealth management and financial planning and someone came up to you after and said, "Hey, that was a really great presentation. I'm really thinking hard about what this means for me. I have so many things going on in my life that are challenging me right now. But I know working with a financial advisor like you could really be a game changer for me," would you just reply by saying, "Thanks so much, that's a nice comment," or would you reply with a question or some more significant response in order to dive into a more meaningful dialogue?

If you're truly wanting to grow your business, you would not pass up the opportunity to dive into discussion with another human being about his or her life to learn how you could help with the services you provide.

Use social media as a place to truly engage with other humans. You will create more opportunities for yourself by engaging in meaningful conversations with 100% of 100 followers than not engaging at all with 1,000 followers.

Engagement and being social on social media are hugely important aspects of leveraging social media.

Additionally, don't just engage with people on your own posts. Find and follow other people who you truly want to build relationships with and engage on their posts. Start conversations. Ask questions. Don't just throw in the easy, "Great post!" Write something meaningful and valuable in the comments section. Sometimes, high-value, meaningful comments on someone else's post can help you gain more followers than your own high-value post—especially if you're just starting to build your following.

If you think of social media platforms as communities rather than places that you build a following, your perspective of social media will shift in a way that empowers and encourages you to leverage social media in a way that aligns with being a part of a community. Ironically, if you engage on social media in a way that aligns with being in a community instead of building a following, you're more likely to build a following faster.

Take it the next level.

Take the conversations from social media to in-person meetings or video conferencing calls. Keeping in mind the networking event analogy, what's your goal with being the keynote of a networking event? You want to find new clients, right? To bring on new clients from the event, you'll eventually need to go from the big event (community) to a one-on-one discussion with everyone you meet at the event.

In the social media world, this means inviting your followers to have one-on-one conversations with you—either via video conferencing like Zoom or in-person for coffee, breakfast, lunch, dinner, an after-work beverage, or some other setting.

In order to connect with your followers and connections on social media, you'll need to use direct messaging functions that are part of each platform to reach out and invite them to connect with you.

Leveraging LinkedIn for Direct Messaging

Let's spend a moment talking about how to most effectively use LinkedIn for connecting with and developing relationships with people.

When you connect with people on LinkedIn—whether they're cold connections, Centers of Influence, warm prospects, or existing clients—it's a best practice to send the connection request with a customized personal invitation. You have the option to simply hit "Connect," and a connection request will go to the person you're wanting to connect with. To take this connection invitation to a more personal level, you should add a personalized message to the invitation. Below is a framework that you can use to structure your own personalized invitations. Additionally, see the three sample messages below that you can use or modify to your specific "voice" and personality.

Framework for a Custom Invite on LinkedIn:

Hi/Hello/Hey, {Connection's Name}!

{Add in something you noticed on his/her profile that intrigued you or the specific reason you're wanting to connect (e.g. he/she is a professional in your local area who you want to meet)}

{Suggest that you'd like to connect at some point in-person or on a video conferencing call; but, for now, you'd like to connect on LinkedIn if he/she is open to it.}

Sample Customized Personal Invitations:

Sample 1:

Hey, Sally!

I see that you run your own CPA practice in {name of your local city/town}. We likely serve many of the same people. I'd love to grab coffee with you sometime soon and learn more about you and your business. In the meantime, let's connect on LinkedIn, if you're open to it!

Sincerely,

{Financial Advisor Name}

Sample 2:

Dave,

We have more than twenty connections in common here on LinkedIn. It seems you're also someone who enjoys meeting people and building relationships in our community. I'm surprised we've not met yet! I'd appreciate the chance to connect with you in-person. First, let's connect here on LinkedIn, if you're open to it.

Best,

{Financial Advisor Name}

Sample 3:

Jesse,

I and my team are helping other executives like you to ensure they're on track with the most effective financial plan possible. I'd love the chance to sit down and learn more about you and your goals to see how, specifically, my team might be able to help you and your family. First,

let's connect here on LinkedIn.

Warm Regards,

{Financial Advisor Name}

Once you're connected with someone on LinkedIn—whether he or she is a brand-new connection or someone you've been connected with for years—you can use the platform's direct messaging feature to reach out and ask your connections to get together so you can further develop your relationships.

Below are a few samples, to get you started, that you can use to craft a message you want to send to your connections.

Sample Direct Messages to Connections on LinkedIn:

Sample 1:

Lucy, it's great to be connected with you here on LinkedIn. We've never had the chance to meet in-person to get to know one another better. And since we're both so active in this community, it would be great to know more about you and your mission—personally and professionally. What kind of interest would you have in grabbing coffee together one morning in the next few weeks?

Sample 2:

Jim, it was great bumping into you this past weekend at the event! It's been a while since we last got together. How about grabbing breakfast one morning in the next couple of weeks? Tuesday – Thursday over the next two weeks are good for me at 7:30 or 8:00am. Any of those days work well for you?

{Financial Advisor Name}

Sample 3:

George, we've known one another for several years. I've never taken the time to share with you specifically how I and my team help people. I'd love to grab breakfast or lunch sometime soon and share with you some of the exciting things we're doing. Also, I'd love to learn more about what you're up to professionally. What days over the next few weeks work well for you to grab breakfast or lunch?

{Financial Advisor Name}

As you start sending more of your own messages, you'll begin to find your own language and know your own best approach.

Use social media as the social platform it is, and you'll create even greater results for your business. Again, you're in the business of working with and helping people. Remember this while using the technology of social media. It will help ensure you focus on being human and personable while creating content and directly reaching out to your connections.

Activity/Check Your Understanding 6

- Once you've spent at least a full month being active on social media (posting and engaging), pick 3 followers or connections who are particularly engaged with your content and send them direct messages inviting them to have a discussion via video conferencing or coffee, breakfast, lunch, dinner, or after-work beverage. This will enable you to further develop relationships with the people you're connected with on social media.

Summary

One definition of the word *leverage* is "use (something) to maximum advantage." When you use social media to maximum advantage, you can create opportunities to build relationships with even more prospects which can help you grow your business faster, and you can deepen relationships with existing clients which will increase your probability of retention with those clients.

Social media is a powerful tool when leveraged effectively.

In this lesson, you committed to and created your own social media calendar which includes topics for the content you will create and share on at least one social media platform. Social media, when used consistently over a period, can open opportunities like no other strategy can. You can reach and add value to the lives of thousands and even possibly millions of people around the world. As you and your firm can become more widely known, your credibility will increase, and you'll have even more people who are aware of the value you can deliver through your firm.

Stay committed. And keep going! Leveraging social media could be one of the greatest investments you make for growing your business.

FAQs

Q: If I make videos, how long should they be?

A: Typically, videos on Facebook, Instagram, Twitter, and LinkedIn get the greatest number of views when they're under 60 seconds. However, if whatever you feel compelled to share is going to take you 2-3 minutes, do that. Don't let the potential for "fewer views" persuade you to not share the greatest value possible. Certainly, if you create and post videos over 2-3 minutes frequently on Facebook, Instagram, Twitter, and LinkedIn, you should consider starting a

YouTube channel. People specifically go to YouTube to watch videos. Therefore, longer form videos are more acceptable and more often fully viewed on YouTube.

Q: Do I need professional equipment for this?

A: Nope! Not at all. In fact, don't spend a bunch of money on equipment. That's just another excuse to delay getting started. If you have a smart phone, that camera will work perfectly well for taking great photos and videos. Nothing else is needed! As you progress further into content creation and want to really ramp up your quality, then spending some money on better equipment can make sense. Truthfully, on most social media platforms today, people expect videos and photos to not be highly produced because highly produced photos and videos don't feel real. And people want real.

Q: Should I hire someone to handle my social media?

A: Again, nope. At least, not initially. Until you're creating so much content so frequently that it starts to become unmanageable, you should handle most of your content creation and posts. Don't spend the money until it starts to feel like it's a job.

Q: Can my team do it all for me?

A: We answered this during the lesson. The answer is no. Your team should not do it *all* for you. Your team can support and assist. But the majority of it should be on your plate—especially, if you're just getting started with social media.

Q: What if I do this for a few months and don't get any traction or results?

A: We answered this multiple times during the lesson. It's vital to understand, though, so it's good to revisit. Experiencing success with social media takes time. You must be consistent over a period. It shouldn't surprise you if you don't feel you're making traction and getting results for at least the first 12 months. Focus on the activity. Keep your head down. Keep creating. Keep posting. Keep going. Good things will eventually happen.

Q: I don't have time to post every week, let alone once per day!

A: If you're like most advisors, this isn't about not having time. For most financial advisors, the challenge is lack of delegation, ineffective time management, and/or not doing only high-impact activities. Handling your own social media is an activity you should not delegate. Find the other things on your plate that you can delegate and delegate them. Make the time for social media. It will be worth it.

Q: My compliance is slowing me down. Is it even worth the hassle?

A: Yes. Whatever it takes, commit to and follow through with leveraging social media. Compliance is in place to protect you and your firm. It might not always feel like they're on your same team. They are. Over time, you'll experience success with social media if you do not quit. Just keep going.

Resources:

Learn more and download the resources referenced in this document from the *Leveraging Social Media* course in Carson Coaching Online.

- **Creating a Business Page on Facebook**
- **How to Boost a Facebook Post**
- **Creating a Company LinkedIn Account**
- **Creating a Business Profile on Twitter**
- **Creating a YouTube Channel**
- **Social Media Calendar Sample**
- **Social Medial Calendar Template**
- **Content Topics Brainstorm**