

Social Media Guidelines

Use these communication guidelines to effectively integrate social media into your marketing plan. We consider websites a professional requirement and LinkedIn is one of the most widely used social media platform for professionals. We recommend you focus on these two areas first. From there, you can carefully consider if your business and target market require the integration of additional social media platforms.



Your Website

Everyone needs a website today – it is your electronic business card. It is likely the first thing potential clients and strategic partners will look at when exploring a relationship with you. That said, it should not be a full-time job. Our rule of thumb to managing websites is about 80-90% of the content is static, meaning it gets updated once a year.

Static Website Content

When it comes to the static content, we highly recommend once a year you carefully review the website to ensure it is up to date with respect to the content which should speak to the following:

- The Wealth Advisory Team
- Your Approach to Wealth Management
- Wealth Management Services & Solutions You Offer

This means making sure biographies and photos are current for all team members. This also means having someone check each page and click on each link to make sure they are all working. Some links become glitched and need fixing – you do not want someone clicking on “Meet Our Team” only to receive an error message.

Dynamic Website Content

The remaining content may include more dynamic content including one or more of the following:

- Articles
- Videos
- Newsletters
- Blogs

Some of these may be managed by your firm, which is terrific! They will often post articles, videos and even newsletters – keeping your site up to date for you. And if they are not doing this – can we ask them to? Remember, it is important that if your website has these options, they are updated regularly. Nobody wants to read a blog post from 2 years ago.

Often websites will also offer **Client Login** for online access. If your website has this, be sure all your clients know where it is and how to access it. This may be an area you want to launch a campaign around with a combination of phone calls, emails, or webinars.



LinkedIn

The next most recommended piece of the social media puzzle for professionals is LinkedIn. This is Facebook but for professionals. It is a great place to connect with clients, prospects, strategic partners, and others in both your personal and professional networks. In fact, we recommend once a year (as we do with all social media) you comb through everyone in your professional community to ensure you have reached out to invite them to join you on LinkedIn. This task can become easier if you adopt a practice of ensuring every new client, prospect, strategic partner, professional or personal contact is invited to join you at the outset of the relationship. You can easily embed this into your New Client Process, and it is already embedded into the Strategic Partner process you will be learning more about in this program.

Be Relevant, but Do not be a Serial Poster

We want you to post with enough frequency to create a pattern of professional awareness with those who follow you, but we do not want you to post so frequently that people tune you out because you are overusing the platform. Overusing a social media platform may cause people to think you are annoying and only post irrelevant content. Yes, we ALL know people like this.

We recommend setting up a proactive posting frequency of every 3 or 4 weeks, which is manageable for most. This means setting a trigger in your Maximizer to remind you – maybe it is the first Monday of every month or the last Friday of the month or even the 15th of every month – pick something that works with the rest of your weekly schedule and set it up as a recurring appointment.

Next, post a variety of items related to:

- You and Your Team – Designations & Accomplishments
- Your Process – Financial Planning & Wealth Management
- Your Client Experience – Client Appreciation, Educational & Branch Events
- Your Giving Back – How You Contribute to Your Community or the Wellbeing of Others
- Articles relates to finance, lifestyle and wellbeing which may come from a variety of sources and readily shared on your profile

- What Inspires You – A quote or article that is simply a pick me up
- Anything else you come across that you feel would add value or benefit your LinkedIn Community

Although we recommend a set posting frequency, just because you pick the first Monday of the month does not mean it is implemented with military precision. It can be any time that week, but that is your trigger to do something. Also, you will come across important things which are timely and meaningful in between your ‘scheduled’ posting – we recommend you do not sit on them and wait until the next trigger – simply post it as an extra.

Pay Attention – Do Better

One of the things we love most about LinkedIn is that it provides a steady stream of real-time intel on Moments of Truth for your clients, prospects, strategic partners, personal contacts, and professional connections. We see announcements about new team members, new locations, industry awards, professional accomplishments and even things as specific as ‘Work Anniversary.’

Do not do what everyone does which is click the button to send the prefabricated LinkedIn message. I mean, if that is all you have time to do – please do because it is better than nothing. However, we recommend that you go above and beyond for clients, prospects, and strategic partners. Send a personal email from your Outlook or a handwritten card to acknowledge the moment. It may even be more appropriate to make a phone call or send along a gift – you will know what to do.

Increases Your Exposure

The other thing you can do on LinkedIn is “Like” or comment on the posts of those you relate to. Every time you do this it increases your level of exposure and creates even more awareness – and not just with your contacts, but with all of theirs.

The best way to do this is to set aside time each week or every other week for 30 minutes to an hour to scroll through your LinkedIn feed.

A Real Life Story

I remember a time when I learned through a LinkedIn notification that someone, I worked with was celebrating a milestone work anniversary with their firm – it was over 20 years. Now, I could have simply hit the prefabricated “Congratulations” message like I’m sure many others did, but I didn’t.

Instead, I pulled out a beautiful Lavish Card and handwrite a nice greeting to the client congratulating them. I also included a decadent tin of Roger’s Chocolates – which I keep on hand in my office for these very moments.

Sure enough, shortly after that I received a personal email from this individual thanking me for the beautiful card and telling me how much they enjoyed the chocolates!

I’m always mindful of how important it is to make a meaningful impact on those who are vital to the success of my business. These types of things are by far the most effective and fun marketing dollars you will ever spend!





Facebook

Some professionals will set up a professional Facebook page to connect with their clients and others in their professional community – mainly because this is where they already are. The typical demographic for Facebook users is older than those of both Twitter and Instagram which means if you have important clients and contacts in the forty plus age range, this may be a great place to connect with them.

We recommend using a professional Facebook page to connect with this group versus your personal Facebook profile for a number of reasons.

- We do not want you to have to censor or be worried about being your ‘real self’ with friends and family because you are concerned one of your clients may not agree with or like your post.
- Every comment on your posts will be seen by your clients and we all have that **one** relative or friend who tends to consistently post inappropriate or questionable opinions – you know who we are talking about. We do not want you to lie in bed at night worried what Uncle Tom is going to say.
- Ever have someone tag you in a photo from 20 years ago that has you horrified and then immediately hiding it from your timeline? Sometimes it is the actual photo, the context of the photo, the implication of the photo, or the colorful comments associated with it. Yes, this happens!

When you have a professional Facebook page you can separate your private self from your professional self. You can create a profile with a photo to get started. Make sure (as with all these social media platforms) you carefully track your log in and access details so you can update them when required.

If you make the decision to have a professional Facebook page, you can follow the same guidelines provided for managing your LinkedIn Profile – they all apply. You can connect, create awareness, uncover Moments of Truth, provide insight and information, as well as announce, invite, and track RSVPs to your client events through Facebook.





Twitter

Twitter is one of the other social media platforms used by some professionals and some of them love it. Others do not want to touch it with a 10-foot pole! Again, let us lean into what is a good fit for you and your clients and let us not adopt anything haphazardly without a plan.

If you choose to launch a twitter account, again we recommend you make a professional profile to keep it completely separate from any personal ones you may use with family, friends, and other followers. As with all social media, we recommend you always source anything carefully before you share it on your platform. From there, we recommend you apply many of the guidelines provided for both the LinkedIn and Facebook.



Instagram

Instagram is a lesser used social media platform for professionals; however, it is one of the best ways to connect with future younger clients. If you choose to launch an Instagram profile, make sure it is kept separate from your personal profile. Ensure your profile is kept up to date and highlights how you want to be perceived, as it is the first thing, and sometimes only thing people read about you and your business. Labelling your account as a Professional Account also lets you track the amount of people visiting your profile, so it is an easy way to see the traction you get from others.

Once a year, you should go through your tagged posts to ensure they match the professional appearance you want to have. Any post you are tagged in which do not align with your desired professional branding, should be removed by untagging yourself. Instagram does not send notifications when you untag yourself making it easy to do so without potentially offending those who posted it.

Instagram's business profile also allows you do to many other things as well, however, keep in mind you should only use social media platforms with which you are comfortable and understand the full extent of their impact.

Putting Social Media into Perspective

When considering the use of social media platforms, remember the power of a personal introduction to you from a trusted source will always outweigh the impact of a single post. That said, for many seasoned advisors they have enough of a client and professional community meaning they do not rely solely on social media to grow their practice – today.

The next generation of clients, however, is different. They are used to online everything. They are used to instant gratification. They are App-happy. And, they have the attention span of a fifteen second TikTok video. If this is your ideal target market, you will need to take a much deeper and more comprehensive approach to integrating social media to grow your practice. To do this effectively, we recommend you assign someone who is completely ‘tuned into’ social media help you manage this, if possible. We also recommend you consider additional training where needed.

Finally, bear in mind that although social media is essential to most organizations who sell products, when it comes to hiring professional services, it is not seen as critical. When is the last time you hired a Lawyer or an Accountant from a Facebook post or a Twitter comment?