



# Build Your Brand with Social Media

**Deepen client relationships. Gain exposure to prospects. Learn from your peers. Recruit.**

Social media can extend your personal brand to make your efforts to build and maintain relationships work even harder. According to a recent SocialWare survey<sup>1</sup>, more than 84% of financial professional survey responders are using social networks for business purposes. Here are 10 tips to help Facebook, Twitter and LinkedIn work for you:

- 1. Plan.** Create an account on Twitter, Facebook and LinkedIn so you can visit the sites and learn how they work. Determine how much time you can commit to marketing yourself through social media. Assess who in your organization can help you provide content and monitor your sites. Talk the plan through with them. Consider putting your social media “send” dates on a calendar to keep everyone on task.
- 2. Research and listen.** Use social media to prepare for prospect and client meetings. Search LinkedIn profiles and Facebook pages to learn about common interests or opportunities before the meeting. Notice what social media platforms your clients and prospects are using and make sure you have a presence there.
- 3. Keep it professional. But be human. Be responsive.** Present your online brand with the same consideration you give to in-person meetings. Provide thoughtful insight and opinions. Spell check. Social media calls for a conversational, genuine tone. Monitor your social media accounts and respond to feedback. Negative comments can be a positive opportunity when you solve a problem. Be open and offer to address the issue. Thank them for their perspective.
- 4. Gather the valuable content you already have.** If you already provide a newsletter, case studies or commentary letters, share selections through social media. Good social media content either directs readers to useful content provided by others or gives your personal insight and observations on a topic. It may be your own content. Notice who has content you can use – providers, asset managers, conference sessions are all

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<sup>1</sup> “Social Media Use by Financial Advisors”, SocialWare 2011 Advisor Study

opportunities to leverage existing content. Make the content on your website easy to share with email, Facebook and Twitter icons. You can also generate content by simply commenting on other people's blogs or answering questions in forums that establish your online expertise.

5. **Connect through Facebook.** Facebook has 800+ million users, more than half of them are active every day. Establish a professional page to promote you and your firm. Use the event feature to invite your fans to seminars and other opportunities you host. Network by becoming a fan of groups and pages you admire. Run a poll on financial issues your clients and prospects care about.
6. **Get a Twitter Following.** At more than 1.6 billion search queries per day, Twitter is the place to find, and to be found. Use the search engine to research prospects or to generate relationships with people you want to know. Create your own following and then comment on insights from experts you follow. Tweet excerpts from your newsletter.
7. **Network on LinkedIn.** Share your experience and qualifications with the social site that is signing up more than 2 new members every second. Use that power to connect with people you want to get to know by establishing a professional profile and joining groups that interest you.
8. **Ready to ramp up?** Consider blogging. Either create one or comment on those you admire. Share what you know. Open up about your ideas and update your clients. Provide content and insights that your clients, and potential clients, care about.
9. **Know the rules.** Be aware of applicable regulations and supervision policies. Contact your compliance officer to understand how the guidelines apply to you.
10. **Promote your online brand and measure your success.** Add the icons to your email signature, your business cards, website and marketing materials. Link your social media accounts so that your tweets populate your Facebook and LinkedIn pages. Consider using analytical tools to measure your social media efforts such as the [HootSuite Pro - Social Media Dashboard](#) or [Google Analytics | Official Website](#) to measure the effectiveness of your blog.

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