



Thought Leadership in Action for Life Insurance

How to Find and Start Conversations with Local Professionals on LinkedIn



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Are you interested in getting more out of your presence on LinkedIn? Would you like to find local professionals and build connections with them? It's easier to accomplish than you might think, you just need a clear goal, a strategy, and a few simple techniques.

Clarify Your Goal

As a financial professional your broad goal may be to connect with local professionals, but your efforts are likely to be more effective if you're more specific about your target connections.

- Do you have a natural connection with a particular group because of your industry or educational background, history with an organization, hobby group, or another affinity link?
- Can you narrow your definition of your target market by any other criteria? Income, job title, geographic area, professional level, etc.?
- How many connections do you want to make on LinkedIn? That which gets measured gets done. Give yourself a measurable goal to track.

For example, Kim is a financial professional who used to own a restaurant. She has been on the board of the local botanical garden for years. She has an automatic connection with local entrepreneurs, especially in the restaurant industry, and with other people who support the botanical garden. Kim might define her goal this way:

“I want to connect with ten local entrepreneurs each week, with a focus on the restaurant industry and my botanical garden connections.”

*In order to sell life insurance products, a financial professional must be a properly licensed and appointed life insurance producer.

“Focus on building relationships and establishing your expertise”

Have a Strategy

How can you best leverage your background, expertise, and personality? Your LinkedIn page is the perfect place to hone your personal brand.

Here are a few of the personality archetypes. You might create your own style within any of these or try something completely different.

- **Advisers:** This is someone with experience, knowledge, and gravitas. If your general personality is serious and scholarly, this might be a good role for you—especially if you interact well with people younger than yourself. An adviser will share lots of useful content and tips on their social media.
- **Influencers:** People who have vibrant personalities tend to attract followers easily. People take advice from influencers because they want to be like that person. If you’re an influencer type, you’ll share some personal content that people find aspirational, like snapshots of your vacations or home, as well as tips and advice.
- **Hotshots:** These are the young geniuses. They have fresh ideas, innovative solutions, and tend to seem eager and energetic. They’ll share outside-the-box ideas and the latest tech solutions.

Whatever persona you choose to take on, also identify some categories of content that your target market will be interested in.

In Kim's case, the influencer role is the best fit. In addition to financial planning tips and advice that relate indirectly to life insurance, she'll share aspirational lifestyle content. She'll also connect with her target market by sharing posts related to the local small business scene and the botanical garden.

Optimize Your Profile

How could you tweak your profile to represent your brand identity and appeal to your target connections?

- **Profile picture:** Think of creative ways to visually present yourself. Check out Youpreneur.com's¹ great article on using headshots as marketing assets for inspiration.
- **Background:** Ditch the blue bar and make your mark with an image or texture that either appeals to your target or highlights an aspect of your persona.
- **About section:** Rewrite in a way that delineates your brand and target market.

Kim uses a headshot in front of her former restaurant: local business owners will register the restaurant name and immediately recognize her as part of their circle. Her background is a banner of the Botanical Garden, so her contacts from there will recognize her immediately. In her about section, she highlights her prior background as a local entrepreneur and mentions the Botanical Garden again.

¹Source: Laura Pearman. Youpreneur.com. “How to Use Your Professional Headshot as a Powerful Marketing Asset” <https://youpreneur.com/how-to-use-your-professional-headshot-as-a-powerful-marketing-asset/>



LinkedIn is searchable by industry, job title, and city. Once you're very clear about who you're looking for, you'll find it easier to pull up a list. From that list, start with people you have a mutual connection with and who appear to be active on the platform.

For instance, since Kim hopes to start building her insurance clientele with local entrepreneurs in the restaurant industry, she could search for "restaurant owner [city]" and quickly get a list of who's on LinkedIn.

On the list, she can already see who her mutual connections are. By clicking through to a profile, she can see how often each person publishes content or updates. Finding the first ten people to approach could take no more than a few minutes.

Make Your First Move

Active LinkedIn users will generally accept a connection request, especially if you have a mutual contact. But it doesn't hurt to send a very brief introduction.

According to LinkedIn², the most effective messages are short and sweet. Shorter InMails perform significantly better than longer ones. Try something like this:

Garden connection?

Hey Bill:

I noticed we've both worked with the Garden and we both know Joe Firth. I'm a local entrepreneur as well — shall we connect?

Kim

Create Content

Now that you know exactly what kind of professionals you're targeting, and how you're presenting your brand, figuring out what kind of content to share should be fairly easy. When you're stuck, consider:

- Motivation Monday, Financial Tip Tuesday, or Thought Leadership Thursday
- Industry news
- Your personal epiphany
- Links to blog posts
- Conversation-starter questions

²Source: Greg Lewis. LinkedIn.com May 19, 2022. "How to Improve Your InMail Response Rate, According to LinkedIn Data." <https://www.linkedin.com/business/talent/blog/talent-strategy/these-inmails-get-best-response-rates>

Remember that you can always repurpose your content. One blog post can be divided into five social media posts, and the best ones could even be made into memes. Then you can record a video of yourself explaining things. Be sure to follow your firm’s compliance guidelines before posting anything to social media.

“When it comes to being liked, you may get further by listening rather than by talking.”

Listen and Support

When it comes to being liked, you may get further by listening rather than by talking. In social media terms, that means how you respond to other people’s content is more important than what you share.

Don’t try to sell or turn the conversation to yourself, just engage in the conversation they’re trying to initiate. This strategy helps generate goodwill quickly.

Connect, Don’t Spam

There’s nothing worse than allowing a new connection into your circle and getting spammed by them. Hurrying to create a sale is often the surest way to lose one. Focus on building relationships and establishing your expertise.

After you feel like you’ve really connected with an individual, gently reach out and ask if you can share some information about a product, service, or strategy that might interest them. Invite them to meet for [a virtual] coffee, or whatever you’d like the next step to be. Again, keep your message very short, as personal as possible, and low-key. For example:

Can we talk?

Hey, Bill. A new policy review checklist just came across my desk, and I think it’d be perfect for you as an entrepreneur. Mind if I share it with you?

Kim

A Final Note

LinkedIn will work best for you if you are very clear about who you’re targeting and how you’re presenting your brand. Make sure to listen more than you speak and give your connections time to deepen before you try to create a sale.

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