



RECRUITING

GAMA
FOUNDATION
eBRIEFS
PRACTICAL IDEAS
FOR TODAY'S
FIELD LEADERS



Volume One

Recruiting Through Social Media

A Guide for the Insurance and Financial Services Industry

Recruiting Through Social Media

A Guide for the Insurance and Financial Services Industry

"We're not Wall Street; we're Main Street."

John F. Nichols
Disability Resource Group, Inc.

Research funded by the GAMA Foundation for Education and Research
Conducted by Association Laboratory

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GAMA Foundation for Education and Research
2901 Telestar Court, Suite 140
Falls Church, VA 22042
Phone: 800-345-2687 or 571-499-4308
gamafoundation.org

Principal Author: Cecilia Sepp
Principal Editors: Kathryn L. Kellam and Kim Howard
Design: Suzanne Schriver | Graphic Design, Baltimore MD

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About Us

GAMA Foundation for Education and Research

The GAMA Foundation for Education and Research is a 501(c)3 nonprofit organization dedicated to conducting and promoting research and education to enhance the profitability and productivity of field leaders in the insurance and financial services industry.

Since its creation in 1990, the GAMA Foundation has funded major studies on key leadership topics, including future trends for firms and advisors, recruiting and selecting new associates, launching new associates, retaining successful associates, mentoring and coaching practices, effective local marketing, building successful advisor teams, developing high-performing leadership teams, and launching new frontline (sales) managers.

Our Contributors

Recruiting Through Social Media was made possible through the dedicated support of the GAMA Foundation's contributors. To contribute in support of our work, please visit us at gamafoundation.org or contact us at support@gamafoundation.org.

Association Laboratory

The GAMA Foundation contracted with Association Laboratory, a consultancy specializing in association management strategy and research, to develop the content for this publication.

The principal author is Cecilia Sepp, vice president and client operations officer at Association Laboratory. She has more than 20 years of experience in association management, research, and writing.

Welcome

Welcome to the newest research delivery format of the GAMA Foundation for Education and Research — our exciting eBook series.

Each eBook (a modern-day white paper) provides research on a tightly focused topic affecting field leaders in the financial services industry, and each will be available for download from the GAMA Foundation's website at no cost.

This valuable resource is made possible by the contributors and volunteers of the GAMA Foundation for Education and Research.

The eBooks will deliver concise research results in a clear and engaging style to make it easy for you to put the findings to work. At approximately 20 to 50 pages each, the eBooks are shorter than our traditional research studies. Though shorter, they will still provide the in-depth and unbiased information you expect from the GAMA Foundation for Education and Research.

In addition to our new eBook series, in March 2015, the GAMA Foundation will debut its newest, boldest, and most anticipated research study to date. *Attracting the Right People* will help you deliver the messages that will attract your future top performers, and a workshop on *Attracting the Right People* will soon follow. This new project, more than two years in the making, will provide groundbreaking insights and perspective to field leaders.

And now, a little bit about the GAMA Foundation...

In 2015, the GAMA Foundation for Education and Research will celebrate its 25th anniversary. As a 501(c)3 nonprofit organization, it funds research and educational resources that help field leaders in insurance and financial services run their businesses more effectively — and it is the only organization in the world that does solely this.

The GAMA Foundation had its start when five field leaders at a GAMA International LAMP meeting had a realization — which led to a vision. The realization was that no industry research focused on field management success. The companies had LIMRA and agents had NALU (now NAIFA) to provide research on how to improve and grow their businesses, but field leaders had no such research devoted to their needs.

This realization led to their vision to create a research and education foundation — a sister organization to GAMA International — to be founded by, led by, and funded by field leaders for the support, development, and growth of all field leaders.

The GAMA Foundation is completely independent and self-funded. No GAMA International dues, no company partnership money, and no outside organizations provide its funding. Instead, the Foundation is funded from the pledges and donations of individual field leaders, individual home office leaders, and individual vendor friends. All stand together and contribute to help today's and tomorrow's field leaders.

The Foundation is also a volunteer-driven organization, with a long history of individual field, corporate, and vendor volunteers donating their time and talent to the work of the GAMA Foundation — and in so doing, making a remarkable difference in the future of field leadership throughout the industry.

The GAMA Foundation's sole purpose is to provide the research and resources that field leaders need to stay relevant, informed, confident, and competent. We exist because of the many contributors who stood up and supported our work during our first 25 years.

Enjoy the GAMA Foundation's new eBook series, focused on recruiting new talent into the advisor and agent careers. In addition to *Recruiting Through Social Media*, watch for the following eBooks to be launched in the spring and fall of 2015:

- *Recruiting Females to the Advisor Role*
- *Recruiting Through Social and Community Networking*

On behalf of financial services field leaders everywhere, your financial support is what allows us to continue to provide these valuable resources. Please make a financial pledge of support or a one-time gift to the [GAMA Foundation](#) today so that we can continue to provide the research that helps you grow your practice.

Sincerely,



Richard T. Cleary
Chair, 2013-2015
GAMA Foundation for Education and Research

Introduction

Recruiting is the lifeblood of your firm, and keeping the prospect pipeline flowing takes commitment, strategy, and an eye for talent. In addition, today's demographic changes — such as Baby Boomers retiring, women comprising almost half of the workforce in the United States, and ongoing migration patterns — mean the industry must continue to refine and update its tactics and strategies for recruiting.

Managing the process of successful recruiting requires dedicated time and energy. Continually evolving technologies provide many tools to assist you in identifying and ultimately recruiting quality prospects for your firm.

This book presents ideas, tips, and advice from field and corporate leaders who are successfully integrating social media into their recruiting programs. Chapter 2 provides a social media primer for those who would like to review the fundamentals.

How We Collected Our Data

Our researchers interviewed 20 members of the industry from field offices to corporate headquarters. The interviewees were regional directors, full-time recruiters, social media managers, field leaders, home office executives, and a social media management and compliance vendor. All interviewees had a minimum of 10 years of experience in the industry.

In addition to the interviews, the GAMA Foundation conducted an online survey of GAMA members to provide a snapshot of how social media fits into the industry's recruiting practices today.

"I don't collect business cards any longer. You just end up with a huge stack of cards and can't find who you want or remember where you met them. Using LinkedIn helps you find people more easily and helps you stay in touch. The point is: How can I stay in touch with people that I am connected with?"

Janice Swanson
The Principal Financial Group



The Case for Social Media

The industry today often faces recruiting challenges due to perception — perception of commission-based pay, perception of a career that involves sales, perception of what the advisor’s role actually is. To successfully recruit, the recruiter needs effective communications channels to address these perceptions.

Once someone is hired, many variables affect the success and the retention of that individual, including the fit and the commitment of the recruit and the quality of the training. But it always pays dividends to begin the recruiting process with the highest-quality candidates possible.

For both of these reasons — identifying quality candidates and establishing effective communications with them — LinkedIn has become today’s preferred recruiting platform.



Why Social Media Is Important

The way we communicate has changed more dramatically over the last decade than it has in the previous 2,000 years. Communication is instantaneous, individualized, and — to an increasing extent — compartmentalized.

As outlined in the Association Laboratory white paper, *“The Future of Component Relations”* (March 2014):

The move to mobile devices to access information on demand, and to communicate almost instantaneously, has forever changed the way individuals interact.

These changes in interaction, access, and communication are a dichotomy: they represent an unprecedented interconnectedness, yet demonstrate the increasing splintering of people into a kaleidoscope of market segments.

Interaction is not necessarily on a grand scale any longer. Rather, it is within narrowly defined groups who communicate with very specific people on very specific subjects...

The world is now about specific networks. It is not necessarily about belonging to large groups (although that is still a motivation for some individuals from older generations). Recognition comes from instantly posting to a Twitter feed, sharing a photo on Instagram, or posting a funny story on Facebook or Tumblr. For in-person interaction, just organize a "tweetup" with your followers or text your friends to meet you at the local coffee house. The power of specific networks locally (geographically) or by specialty will continue to grow, creating an ongoing evolution in the models [of] engagement.

In response to a fracturing and splintering marketplace, social media can support your goals to better identify and engage with specific markets to increase the quantity and the quality of your advisor prospects.

"Recruiting is very different than it was 10 or 15 years ago; it used be just the job boards and 'post and pray.' Now it's all about building relationships. If you use social media with the post-and-pray strategy, it will fail. You have to manage and be the voice behind your social media recruiting program — it won't work on its own."

Caitlin Sanford
Modern Woodmen of America

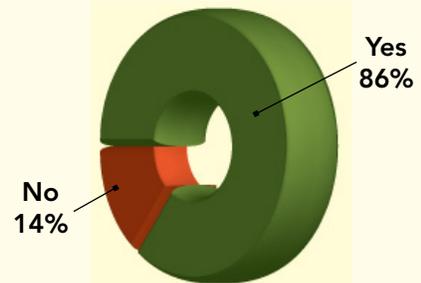
Traditional recruiting methods, such as career fairs, résumé searches, and reaching out to local social and community groups, still yield results. Integrating these methods with your social media strategy widens your talent pool and increases awareness.

"Social media is utilized to support the recruiting process — not replace it."

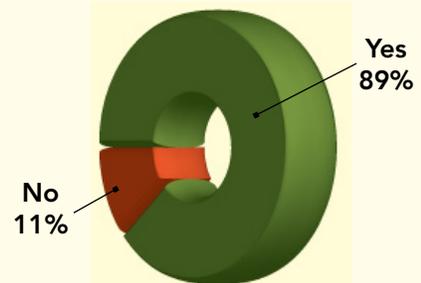
Kurt Soper
COUNTRY Financial

FROM THE MEMBER SURVEY

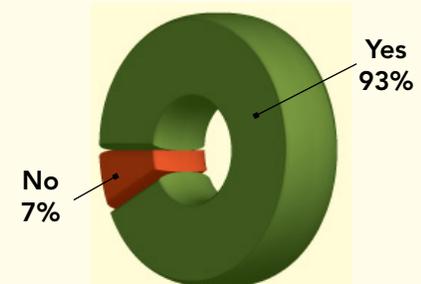
Do you use social media for recruiting?



For the Nos: Do you plan to add social media to your recruiting program?



For the Yeses: Do you plan to expand your social media recruiting program?



Social media can be key to reaching a variety of groups and niche audiences. The LinkedIn Group function allows a recruiter to connect with demographic segments by interest area or community. Using LinkedIn Groups can get you in front of these target markets more easily and let you maintain a presence more consistently than by only attending local events.

LinkedIn makes diverse recruiting easier, but you still have to get out and see people.



Include your LinkedIn profile in your email signature to help build connections.

“Over the past two years, an increasing number of our agency appointments have come from folks sourced through LinkedIn. With the large number of appointments we coordinate each year across the enterprise, this is a significant trend to note. We are connecting with people we wouldn’t normally have connected with because personal networks can only go so far. Social media allows you to scale your network and connections.”

Harry Hofer
State Farm Insurance Companies

FROM THE MEMBER SURVEY

The reasons given for not using social media to recruit:



Another LinkedIn tool is the private messaging function called InMail. This is a softer approach to reaching out to people, and often people respond more quickly to a LinkedIn message than regular email.

“If you know you are going to make 20 phone calls per day, do you want to make calls to 20 people you know and have some information about or 20 calls to people who match a key word in a résumé database? LinkedIn offers more insight than a résumé and can help you make a warm introduction. It also allows you to find people who may want to find a new job or passive candidates who may want to do better in their careers.”

Nate Isaacson
The Guardian Life Insurance Company of America

The online world offers a more effective gateway to candidates for the recruiting pipeline with higher return on time invested than ever before.



2

A Social Media Primer

If you are not very familiar with social media, this chapter is for you. If you are generally comfortable with social media, feel free to skip ahead to Chapter 3.

What Is Social Media?

Wikipedia has a fine, if somewhat advanced, definition and description of social media.¹ But for most of us, it is simply the ability to use technology to share news, comments, questions, and photos about our daily lives. Whether it is work, play, or current events, social media provides quick and easy ways to share a little bit about ourselves.

Social media allows us to take our networks from the real world and expand them into the virtual world, helping to deepen relationships and to raise awareness of what is important to us as individuals.

“People have to understand that social media isn’t something you can resist. You have to go and do it. You will be left behind if you don’t do it. The consumer and the candidate don’t care how things have been done for the last 20 years; they care about how things are being done now.”

Nate Isaacson
The Guardian Life Insurance Company of America



Businesses have embraced social media as a way to market themselves, identify potential customers, maintain strong relationships with customers, and share meaningful content with various audiences. It’s also a tool to answer customers’ questions or resolve the problems they post online.

¹ **Social media** is the social interaction among people in which they create, share or exchange information and ideas in virtual communities and networks. Andreas Kaplan and Michael Haenlein define social media as “a group of Internet-based applications that build on the ideological and technological foundations of Web 2.0, and that allow the creation and exchange of user-generated content.” Furthermore, social media depend on mobile and web-based technologies to create highly interactive platforms through which individuals and communities share, co-create, discuss, and modify user-generated content. They introduce substantial and pervasive changes to communication between organizations, communities, and individuals.

What Are Social Media Platforms?

Social media platforms are tools you have already heard about, even if you aren't using them. The platforms are the software packages, apps, websites, and online communities that allow individuals to connect with one another for everything from professional interests to sharing recipes.

The most well known are sometimes referred to as "The Big 3": Facebook, LinkedIn, and Twitter. These platforms are used by millions of people around the world every second of every day. Other popular social media platforms include Google+, Instagram, Pinterest, and Tumblr.² Right now, in this moment, millions of individuals who use these tools are adding content to the Internet. See the sidebar to get an idea of how many people are using these social media platforms.



Facebook

- › 1.28 billion monthly active users
- › 72 percent of online adults visit the site at least once a month
- › More than 50 million pages
- › 75 percent of the engagement on a post happens within the first five hours
- › Most common reason to unlike a page: uninteresting posts



Instagram

- › 200 million monthly active users
- › 20 billion-plus photos have been shared to date
- › 23 percent of teens consider it their favorite social network
- › 50 million users signed up for the photo- and video-sharing social network in a six-month period during 2014



LinkedIn

- › 187 million monthly active users
- › 300 million-plus total users
- › 39 million-plus students and recent college graduates
- › More than two users sign up for service every second
- › 44,000 daily mobile job applications



Twitter

- › 255 million monthly active users
- › 1 billion-plus total users
- › 500 million Tweets are sent per day
- › 44 percent of users have never sent a Tweet
- › 46 percent of users Tweet at least once a day



YouTube

- › 1 billion-plus total users
- › 6 billion hours of video watched per month
- › 100 hours of video uploaded per minute
- › 1 billion mobile video views per day

² The 15 most popular social media networking sites: <http://bit.ly/1d2L2hr>

“There’s no reason not to use social media; it’s a no-brainer. It’s a free way to get yourself out there and stay top of mind. If you aren’t using social media with your connections, your competitor is.”

Laura Sanders
New York Life Insurance Company

Which Platforms Are Being Used for Recruiting?

When it comes to social media recruiting in our industry, the most common answer is: LinkedIn. This was our finding in both the interviews and the member survey.

FROM THE MEMBER SURVEY				
Use of Social Media Platforms for Recruiting				
How Used				
› To make it easy for prospects to find our firm or company	82%	39%	7%	6%
› Sourcing — Generating names of prospects to contact	79%	24%	4%	1%
› Establishing or maintaining communication with prospects	60%	23%	6%	2%
› Prequalifying a prospect before a first meeting	47%	19%	3%	0%
› Further qualifying a prospect before a second or subsequent meeting	17%	10%	2%	0%
› To promote brand awareness of the company or firm	75%	43%	13%	12%
› To share information about the firm’s culture or activities	46%	36%	11%	8%
› This site’s activity is controlled by the corporate office	26%	15%	7%	15%
› Do not use for recruiting activities	2%	45%	81%	79%
› Other	3%	1%	1%	3%

LinkedIn

According to Wikipedia:

LinkedIn is a business-oriented social networking service. Founded in December 2002 and launched on May 5, 2003, it is mainly used for professional networking. By 2006, LinkedIn reported 20 million viewers. Currently, LinkedIn reports having more than 330 million members in more than 200 countries and territories.

How's that for a potential recruiting pool?

LinkedIn is not just a résumé website — it is a tool for building relationships. It allows recruiters not only to view résumés, but also to learn the interests of potential recruits. You can share content on LinkedIn in a manner similar to the Facebook newsfeed and use search functions to find prospects. Additionally, it offers the options of connecting within the network and messaging via the InMail function (an internal email system).

LinkedIn is replacing the use of résumé sites like Monster.com and CareerBuilder.com because it offers community and is more efficient and more detailed. Being part of LinkedIn allows recruiters to grow relationships over time and observe how an individual develops.

“When it comes to recruiting, LinkedIn is easier for measuring effectiveness than Facebook. You can put ads for jobs on LinkedIn and then do detailed follow-up, and you can track the pipeline. Facebook is more about enabling the recruits to do their homework on the branch, its culture, and our industry; it’s qualitative research for the recruits. You need to use both to be most effective.”

Eileen Forrest and Nicole Pesce
AXA Advisors

LinkedIn offers a variety of ways to participate: The Basic account for maintaining a professional profile online is free; Premium accounts for a fee provide options for landing jobs with Job Seeker, finding customers with Sales Navigator, hiring talent with Recruiter Lite, and boosting your professional life with Business Plus. LinkedIn also has an advanced suite of premium talent solutions, including LinkedIn Recruiter, which is a separate platform that offers access to the entire LinkedIn network.



DID YOU KNOW...

The following LinkedIn premium accounts offer more recruiting features than the Basic account (features and costs vary). Click each link to visit LinkedIn and learn more.

- > [Recruiter Lite](#)
- > [Recruiter](#)
- > [Talent Solutions](#)

"I use the LinkedIn Talent Basic package, and I'm thinking of moving to LinkedIn Recruiter because of the success I've seen from using InMail — the extra money is worth it. If you compare the costs of this to the costs of CareerBuilder.com or Monster.com, it's much less expensive. The job sites cost thousands per year for a subscription."

Christopher Wagner
Mutual of Omaha



DID YOU KNOW...

LinkedIn offers a certification for recruiters. Click the link to learn more.

› [LinkedIn Certification](#)

Other Platforms

The use of Facebook and Twitter is heavily restricted by home offices, and they are not ideal tools for recruiting. Their strength is in branding, sharing news, building market awareness, and educating communities about the company or firm culture.

"The less education around social media, the more risk you create. It's a risk-averse industry, so education is important to minimize risk."

Adam Sherman
New York Life Insurance Company



DID YOU KNOW...

On July 1, 2014, Morgan Stanley opened Twitter to more than 16,000 advisors (if they took an online course and had at least 15 followers). See story here:

› <http://bit.ly/1oNaU6m>

YouTube is not being used for recruiting, but some companies have plans to use it for brand awareness and corporate communications. Pinterest is also being used for branding in some cases.

Google+ (Google's response to Facebook) is not often used because it is not seen as a tool for recruiting and is not the best for creating the connections desired for building business. It's not as well known or frequently used as Facebook, and it does not allow archiving content.

Some home offices are integrating their Facebook, LinkedIn, Twitter, and YouTube communications for building the corporate brand in the social space. Using these tools for corporate communications allows the company to have a better integrated communications strategy for financial education, success stories, career opportunities, and so forth.

“Our social media compliance policies are consistent with our policies for advertising and sales literature and electronic correspondence. The policies aim to protect the public according to FINRA and SEC guidelines, and they also protect the company.”

**Eileen Forrest and Nicole Pesce
AXA Advisors**

Other tools, like Instagram, Snapchat, or Vine are geared toward marketing a product rather than a career. These platforms are not conducive to recruiting because they are primarily visually focused. The bottom line is that the one social media tool people use for career development is LinkedIn.

Why Social Media?

“You can’t deny the economics of it; how do you scale the ability to contact people?”

**Harry Hofer
State Farm Insurance Companies**

Potential recruits are forming their first impressions of a company based on their own research using online tools. Companies want to make a good impression on the public and on potential recruits, so having a strong brand presence online is essential. Effective use of social media supports these goals.

LinkedIn offers an efficient process to identify potential recruits, and it is a great resource for high-quality candidates. It also offers effective content management for messaging target audiences and maintaining brand awareness. If you are considering outsourcing your recruitment efforts, be aware of this experience: An interviewee found that vendor recruiters were sending the names of prospects they found on LinkedIn without ever meeting them. Why should you pay an outside recruiter when you can find the people you want and connect with them on your own?

“We had to do it — it was important to move into social media for recruitment because if we didn’t do it, it was a missed opportunity. It was a matter of how we would do it, not that we would not do it. LinkedIn was very successful based on our pilot project program, and we are rolling out LinkedIn to our field associates.”

**Birdia Chambers
The Prudential Insurance Company of America**



LinkedIn offers several levels of access that are tailored to your needs. It also works with companies to develop packages for multiple users, which is a budget-friendly way to go.

Before social media, static environments, such as job boards, were the main options for recruiters. Social media offers a broader and more dynamic environment where you can build upon the warm relationships in your life with the potential growth from building more and more relationships. It's a never-ending pipeline.

“You need to discover and unearth connections of connections.”

Adam Sherman
New York Life Insurance Company

Demographically, people are on social media connecting, communicating, and conducting their job searches. In many cases, it's easier to connect with people using a LinkedIn message than making phone calls. The industry's use of online résumé sites is declining as more people move their professional lives to LinkedIn. Another way to look at it: LinkedIn is where the action is.

LinkedIn offers more insight than a résumé. It also allows you to find people who may want to find a new job or passive candidates who may want a better career opportunity but aren't necessarily looking. This is where LinkedIn supports recruiting ROI (return on investment). Participating in LinkedIn communities can serve as both a drip marketing tool and a network to identify prospective advisors.



“I wish I had known using social media for drip marketing yielded potential recruits; I might have taken a more active interest in it sooner.”

Michael S. Conk
The Principal Financial Group

Social media is more targeted than résumé sites, and your connections are at a higher level. You can save both time and money by operating in the dynamic online world rather than the static world of outdated job boards and snail mail.

“AXA realized that social media was not a fad! It made sense to enable our financial professionals to be there because if they weren’t, their absence would be noticed. Our audiences moved on to social media, so we decided it was a good way for our financial professionals to stay in touch with clients, prospects, business associates, and others. Being on social media provides our financial professionals with expanded opportunities for building business and recruiting.”

Eileen Forrest and Nicole Pesce
AXA Advisors

Create Your Own Accounts

Please check with your company regarding its policies and compliance requirements for any social media accounts associated with your firm or business. To set up personal social media accounts, the following links will help you get started:

- **Facebook:** <https://www.facebook.com/help/345121355559712/>
- **LinkedIn:** <https://www.linkedin.com/>
- **Twitter:** <https://twitter.com/signup?context=login>
- **YouTube:** <https://www.youtube.com/watch?v=p2N72ACocFg>

In addition, this YouTube [video](#) explains the basics of setting up a LinkedIn account.

3

Putting Social Media to Work

Like any other recruiting tool, the effectiveness of social media comes down to knowledge and execution. In the GAMA Foundation survey supporting this research, managers reported a mixed success rate for social media recruiting. Some saw it as having little or no impact, others reported strong results, while still others believed they could be using it more effectively.



“Social media is not a sprint; it’s a marathon.”

Caitlin Sanford
Modern Woodmen of America

This chapter shares basic strategies and practices for using social media to better achieve your recruiting goals.

Strategies and Practices

If you don’t currently have a social media recruiting program, consider the following four strategies to organize your social media practices:

1. Connect with quality people
2. Engage in meaningful ways that provide value to your audience
3. Raise awareness of the industry and its value
4. Positively position the advisor career

Whatever your strategies, they should support and build your brand, connect you with quality individuals you would not otherwise meet on a regular basis, provide value to your audience, and gently educate them on the industry.

You will know your strategy is successful when social media becomes part of your overall recruiting process and is used every day as an integrated tool for recruiting. This requires the commitment to learn the tools and to use them on a regular basis.



DID YOU KNOW...

Glassdoor is a site where employees and former employees anonymously review companies and their management. This newer entry to online business information gathering may change the way people find jobs and the way companies recruit top talent.

> <http://bit.ly/1BNS1Gi>

Guiding principles for social media interactions: CROP

Commonality • Reciprocity • Opportunity • Purpose

Adam Sherman
New York Life Insurance Company

The following practices will help you elevate your social media recruiting program.

Proven Practice: 10 Minutes a Day, Two Phone Calls

Spend 10 minutes per day proactively connecting — two phone calls to current or new connections for meetings. Coffee is always a good start. Use InMail if you need to connect late in the day or evening.

“Within 24 hours of connecting with someone, I pick up the phone and call them. Most are surprised to hear from someone who is a connection on LinkedIn. Before the call, I read the LinkedIn profile to find items to mention in the call.”

Christine Guessford
The Guardian Life Insurance Company of America

Another approach is to spend one to two hours per week on LinkedIn working connections and then two to four hours per week making phone calls based on LinkedIn information.

Proven Practice: Go Deep

Go deep into your relationship network and find out who your connections are connected to. Answer this question: Who makes up your network? Then ask for referrals and personal introductions.

When looking for people to connect with, ask yourself this question: What do you have in common with them? Are you both military veterans? Did you go to the same college? Do you live in the same neighborhood? Are you both soccer fans?

“Look beyond LinkedIn being just a résumé search tool; use the fact that you can see more deeply into someone’s world. You can make the process of sourcing more efficient so that your very best people can do the sorting. Whoever is leading the agency should be using it; they can get so much information so quickly that there is no reason not to be directly involved.”

Amy Salo
The Guardian Life Insurance Company of America

On LinkedIn, you can source prospects using key words (like “seeking new opportunity” or “in transition”) and you can build your own unique networks based on geography, college alumni, shared experiences, or professional interests.

Proven Practice: Build Relationships and Credibility

Having an online presence allows you to humanize your firm for the people who find you online. Focus on building relationships, not on marketing messages. You can find referral partners on LinkedIn as well — some of the best referral partners are other recruiters, career transition coaches, and university faculty.

Using LinkedIn for recruiting allows you to reach more individuals who may be potential candidates, to search networks more easily, and to better leverage your existing network. The LinkedIn search function supports this by giving you the ability to search on key words like “entrepreneur.” And using the newsfeed to share content allows you to stay top of mind by consistently building awareness.

“A majority of what I do is searching for names of people using key words; I do it regularly. Mainly, I use the InMail function to contact them; I don’t normally connect with people unless they invite me to connect. I use the project folder function to organize the InMails I send, which also helps me to manage the candidates — it’s like a CRM built into the LinkedIn Recruiter package.”

Leslie Nichols
First Command Financial Services



Schedule social media activity weekly; set goals for contacts and identify content.

By building the brand and your own credibility online, it becomes easier to make connections with both prospects and potential clients.

Getting Engaged

Now that you’re connected on social media, what do you say? When it comes to your online presence, content rules. Provide content that attracts the type of people you want to recruit.

“It’s always about the content strategy; it’s what brings people in and builds credibility. Don’t oversell job opportunities; push industry news and content that engages people and makes them push the like button.”

Ani Young
Bankers Life and Casualty Company

You need to build an understanding of the audience you are trying to reach, and then design a content plan that delivers information they will find of interest.

LinkedIn

Sharing specific content with LinkedIn groups is a way to build relationships and awareness with target audiences. For example, are you trying to reach career changers? Share career development or second-career articles. If you are trying to reach young professionals looking for their next step, try sharing articles from *Young Entrepreneur* magazine.

Many of the content management vendors share data based on key words. Using this data, you can identify content that fits the audiences you are tracking. Topics you can cover include career development, financial news, social trends, and current events.

CONTENT RESOURCES*

- › [Entrepreneur magazine](#)
- › [Forbes](#)
- › [John Maxwell leadership information](#)
- › [Success magazine](#)
- › [TED Talks](#)

** Check with your company regarding its compliance and approval process.*

“You have to be consistent; you can’t dabble in it. Don’t connect to just anyone; target your search and be specific, then follow up — reach out and be personal. And when it comes to content sharing, once a day is not enough! Your posts get buried as your network grows; if you post throughout the day, you can reach more people.”

Michael S. Conk
The Principal Financial Group

If you are using a content management company to manage compliance, you have access to a library of preapproved articles for sharing online. Use this library to find content that builds credibility, raises awareness, and demonstrates expertise.

Facebook

Facebook content should skew toward visual, such as photos that show what it’s like to work in your firm. Promote your advisors and staff and share information about what you do in the community as well as what you all do for fun! Prospects want to understand the lifestyle of the industry and the types of people who work in it. You can also include information about your team’s children’s activities at school or in sports, or share information about hobbies, like gardening or running marathons. It helps build connections by personalizing the industry.

POPULAR SOCIAL MEDIA COMPLIANCE AND CONTENT MANAGEMENT COMPANIES*

- › [Actiance](#)
- › [Hearsay Social](#)
- › [Protegent compliance software](#)
- › [Socialware](#)

** Check with your company regarding its compliance and approval process.*

“I am a working mom who has sports-playing children. Professionally, I want to hire more diverse people. I was at the soccer game, and no one was talking. All the moms were on their phones and Facebook pages. That’s when I had my aha moment: Everyone was on social media — the people I want to hire are on Facebook and LinkedIn. I realized five years ago that I had to get on board with this.”

**Georgette Geller
AXA Advisors**

A contributor noted that too many people act different online than in person, and this is not the best approach. Be yourself online, just like you would be at a cocktail party or other social gathering.

“These social media tools allow you to LISTEN to the audience and find their interests and follow events. Twitter is more like a conversation, and LinkedIn is professional; Facebook is more personal life. You have to use them all intelligently to engage the right person at the right time.”

**Gary Liu, Sarah Pedersen, and Jason Suen
Hearsay Social**

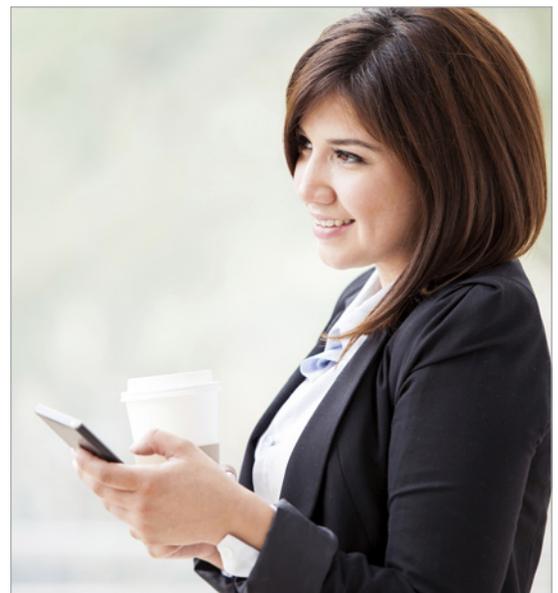
Whatever you decide to share, the goal is engagement with potential recruits and potential clients.

Planning Your Content Strategy

When planning online content, try 70 percent nonfinancial and noncompany related; 20 percent financial information; and 10 percent company-branded content. Some of the best content is local to your community.

Possible topics include:

- Messages on special occasions or holidays, like Mother’s Day or Father’s Day
- White papers and research findings
- Future-oriented trends
- Résumé tips
- How to prepare for a job interview
- Inspirational stories
- Areas of personal interest like sports, personal development, or hobbies
- Videos you make yourself



Don't forget to post daily — it builds your audience. And given that you want to build recognition and awareness, don't be afraid to repost something — it may not be seen the first time.

What *not* to share:

- Do not post anything that looks like sales or promotion of the company or its products. Stay focused on interesting and useful content that provides value to the audience.
- Don't spam your network with postings about job openings.

And stay compliant. Each company has its own specific compliance rules, so be certain you're following those rules.

Be careful what you "like" online, and don't post testimonials about your company or your colleagues. Give thought to the impression that your postings create — it's important to create a positive and professional image. Familiarize yourself with the [privacy settings](#) offered by Facebook to control the messages and comments that appear on your page.

"Content sharing builds awareness over time. Content is for the audiences we are trying to attract. If you just focus on business topics, people tune it out. It's not about a career and a product — it's about an opportunity."

Nate Isaacson
The Guardian Life Insurance Company of America

If you have an RSS reader, you can connect it to your social media accounts. This makes sharing content extremely easy, including on LinkedIn. RSS stands for rich site summary or really simple syndication. Suppose that one of your connections really likes your postings. By subscribing to your RSS feed, they would not need to manually check for your new content. The RSS reader would continually check the site and feed them the new postings as they arrive.

In the end, there is no magic formula for content, so continue to test and learn. Your audiences and their interests will change, and you will want to be responsive with your content.

Using Social Media for Prospecting

If you are a field leader in financial services, one of your most important responsibilities is to generate names of prospective advisors from your existing advisor corps. Today you can build social media into this process with great results. For instance, in meeting with an advisor to solicit names, the process might be easier and more effective if you reviewed their Facebook or LinkedIn contacts together to identify likely candidates.

In addition to building social media into your internal sourcing processes, the following are some specific techniques for using LinkedIn for prospecting:

LinkedIn Groups

LinkedIn Groups was the most commonly cited online group function used for prospecting. It provides an excellent way to identify target audiences by geography, alumni group, special interests, career changers, or profession.

These niche groups open doors to connecting with cultural markets, military veterans, local prospects, job seekers, or organizations that could offer opportunities for attending or presenting at events. Groups are where people share information, and a recruiter can use this to gain insight into a potential prospect's interests and career goals.

"I've hired people in the past from a local sport bike forum. We have also been able to use this resource as an avenue to expand our motorcycle insurance business. Forums are a great way to target a specific audience for recruiting or to build business in niche markets."

**Kurt Soper
COUNTRY Financial**

Join groups where ideal candidates are likely to be; for instance, look at career services groups or alumni groups — these are gold mines for local recruiters who focus on their geographic areas. Review the statistics about a group before joining — if you're in Milwaukee, don't join a group based in Seattle.

"LinkedIn Groups are a great opportunity for clients to get to know more people; the stat feature is great for seeing who is in the group. Don't use this as a place to send too many company messages. Instead, use it as a way to make connections rather than spamming content or overhyping sales or job openings."

**Gary Liu, Sarah Pedersen, and Jason Suen
Hearsay Social**

Focus on individual connections. Connect with people who share interests and are located in your area. Use key words to identify prospects, and share interesting content that builds audience and brand awareness. By participating in group discussions, you can engage with new contacts and expand your network.

"People on LinkedIn are employed and happy but open to hearing about new opportunities. You find people who are successful. My mentor, David Boykin, always says, 'The best candidates are unavailable and hard to get to.'"

**Christine Guessford
The Guardian Life Insurance Company of America**

The GAMA Foundation's *Firm 2020*³ and *Advisor 2020*⁴ research studies identified micro-target marketing as an emerging trend, and this type of marketing can be performed today using the Groups function on LinkedIn. To do so, identify subgroups within groups and look for ways to provide value. You can build a reputation as a thought leader by sharing niche content and posting questions to start discussions.

Facebook and Twitter do not offer the same opportunities for connecting with people based on this type of segmentation.

No matter how many LinkedIn connections you have, or how many groups you belong to, social media will not replace in-person interaction. You still need to be out in the community meeting people and being engaged.

Data Mining with LinkedIn

Data mining is the practice of examining large databases to generate new information. For example, by searching on LinkedIn using key words like "seeking new position" or "entrepreneur," you can identify subsets of individuals within the larger LinkedIn database.

The tool for data mining in LinkedIn is the search function, which offers a variety of options for searching the network through the basic search and advanced search tools.

With the LinkedIn Basic and Premium accounts, you can access the advanced search function by clicking the "advanced" button to the right of the search window. This opens another window where you can build a search on demographics or characteristics.

"I find the free version of LinkedIn just as effective as the paid upgrades. Before you consider an upgraded account, understand the limitations of the free version first."

Christine Guessford
The Guardian Life Insurance Company of America

You cannot save searches using Basic or Premium accounts, but you can save a search using an upgraded account like Recruiter or Talent Basic. With Talent Basic, you can save up to seven searches and name them based on type, such as "athletes" or "banking."

Searching with any account level allows you to use Boolean searches.⁵ These offer very specific searches based on your needs and interests. According to www.webopedia.com, a Boolean search is:

A type of search allowing users to combine keywords with operators such as AND, NOT and OR to further produce more relevant results. For example, a Boolean search could be "hotel" AND "New York." This would limit the search results to only those documents containing the two keywords.

³ *Firm 2020* executive summary: <http://bit.ly/1ncQI2d>

⁴ *Advisor 2020* slide deck: <http://bit.ly/1rgYRho>

⁵ LinkedIn Boolean Search Resource: <http://talent.linkedin.com/assets/Product-Pages/Training/TipSheet-BooleanSearching.pdf>

To conduct a Boolean search, you combine key words using the Boolean search terms in all caps: for example, financial advisor NOT assistant; entrepreneur OR franchise; athlete AND invest.

Other suggestions for key words in Boolean searches are: job title, first and last names, education, geography, and ZIP code — the combinations are endless.

If you have an account where you can save searches, it allows you to use a consistent method for sorting and filtering potential prospects. Once you identify a prospect this way, you can contact them via InMail or business email (depending on your company's policies).

You can also contact prospects the old-fashioned way: by telephone. If they don't list their phone numbers in their LinkedIn profiles, you might be able to find them via a Google search.

Continue to follow best practices when data mining. Don't simply connect with people who randomly come up in your search. Identify those who have specific areas of experience or skills that reflect the type of individual you seek. You want your search outcomes to support your ultimate goal: recruiting the right people.

"We are very mindful of the potential impact of our recruiting activities on our consumer brand. We don't mass data mine. We have a selective approval process. So, we definitely lean to individualized 'quality' versus 'quantity' type searches. The best example that relates to data mining takes us back to LinkedIn. You can do very refined searches using their licensed recruiter tools to begin connecting with potential candidates. The more individualized the message with these connections, the more likely they are to continue in our process. We have stayed away from broad data mining."

Harry Hofer
State Farm Insurance Companies

If you contact someone and they aren't interested now, they may be interested in the future, so keep them in your network. They become part of your audience when using LinkedIn as a drip marketing tool.



Look through your connections' connections — you may find that your expanded network includes high-quality prospects. Also, use the search features to their full advantage: Search on geography, industry, key words, or specific professional traits. Then use the introduction tool to make new connections.

If you don't mine LinkedIn for prospects, it is still a great tool for following up on résumé searches. Some use it to compare the LinkedIn profile with the résumé to see if they are consistent or if the profile offers more information.

You may also view an individual's posted presentations in SlideShare or view an individual presenting in a video that is on his or her page. This allows you to see the candidate in a multidimensional way rather than simply reading a résumé.

Connect!

After identifying a prospect, your message should be professional yet personalized. For example, use a standard message about an opportunity, but include specific information from their profile to tie to the potential career: "I saw in your profile that you have sales experience in the St. Louis area; we have an opportunity in our local firm that you may be interested in exploring."

"I have been successful in connecting with people the way they are comfortable connecting — whether that is email, LinkedIn, or Facebook. Each generation has different communication preferences, and it's important that our recruiting practices reflect that."

Kurt Soper
COUNTRY Financial

Once you are connected to someone, pick up the phone and start building a relationship. LinkedIn is just the beginning of connection and engagement — the relationship is built in the real world.



4

Enhancing the Social Media Process

At the local office level, typically one individual takes the lead for posting social media content and managing outreach to prospects. In many cases, a team of people within the firm provides additional support for social media management.

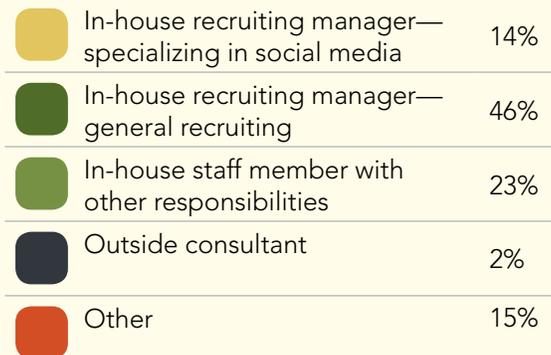
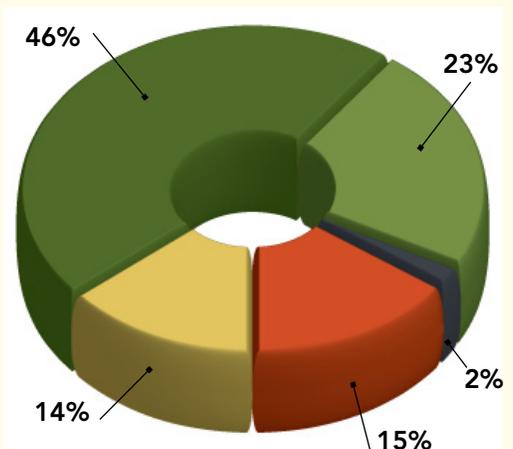
This is where using LinkedIn tools to their best advantage saves time and money. The search tools, notifications, and messaging functions can support a robust recruiting program without investing too much time. Additionally, using an outside vendor for compliance and content management allows you to select and schedule posts in advance to manage content effectively and consistently.

Management tools, such as Hootsuite, allow you to cross-promote and schedule your posts on several social media platforms. If approved for use in your company, it's worth considering a tool like this to manage your time.

A few minutes per week can allow you to set up your posts for the week or for up to three months, depending on the vendor or the social media management tool you use.

FROM THE MEMBER SURVEY

Who manages your social media recruitment program?



Prequalifying or Qualifying Candidates

Using social media to prequalify or qualify candidates is still in its infancy. Among GAMA Foundation survey respondents, 39 percent reported they qualify or prequalify just 5 percent or fewer prospects using social media.

Our best-practices interviews came back with a split decision: About half reported that they always use social media in some way to prequalify or qualify a candidate, while the other half said they never do.

FROM THE MEMBER SURVEY		
Using Social Media for Prospecting		
Survey response categories	What percent of your prospects are identified through social media?	What percent of your prospects do you qualify or prequalify through social media?
Up to 5 Percent	37%	39%
10 Percent	27%	11%
20 Percent	15%	11%
33 Percent	11%	8%
50 Percent	8%	14%
75 Percent	1%	10%
100 Percent	< 1%	7%

Those who said “no” stated that they use their companies’ established processes for vetting and recruiting prospects, which focus more on phone conversations and in-person meetings.

Another reason cited is that not everyone keeps their LinkedIn profile up-to-date — especially passive candidates who are not actively looking. And for some companies, it is against policy to prequalify or qualify using social media information. Be wary: It could be considered discriminatory to *only* look at an online profile regarding a prospect.

“No, I don’t use social media to prequalify candidates. To really qualify someone, there needs to be a conversation. I can’t qualify someone just looking at the profile; I need the conversation.”

Leslie Nichols
First Command Financial Services

However, those who said “no” also stated that they will read a LinkedIn profile to prepare for a meeting with a candidate or to see if the profile syncs with the résumé. It provides additional background information but doesn’t replace any part of the vetting process.

In the “yes” category, not having a LinkedIn profile can be a red flag because it leads to the question: *Why doesn’t this person have a LinkedIn profile?*

Using the LinkedIn profile can help with the prequalification process by offering more information than you can find on a résumé, such as the candidate’s network and community. Discussing the LinkedIn profile becomes a conversation piece during the in-person meetings, giving you the chance to learn much more about the person than you would from just reading his or her résumé.

Additionally, those in the “yes” category said they review Facebook and Twitter to see if any of the content points to the candidate not being a good match for the industry.

“You have a better ability to screen candidates, because you know who they are before you meet them; they themselves are also more prepared because they are doing their own research on LinkedIn before the meeting. It makes the conversation much less of a conversation with a stranger — it’s a conversation with someone you’ve started to get to know.”

Amy Salo
The Guardian Life Insurance Company of America

However you use social media to prequalify or qualify a prospect, it still comes down to finding the type of person you want with the qualities you seek.

For many, the philosophy is to not be over-picky — it’s better to talk with more people rather than fewer, because sometimes the best candidates have the worst profiles. They are out of date because they aren’t actively looking. And passive candidates view the career through a clearer lens than someone who really needs to find work.

Using a search engine, such as Bing, Google, or Yahoo, to check out candidates provides another tool to gather information because you can search their names to see what news you find. It also may show other networks they belong to or social media tools they use.

In the end, when researching prospects on social media, the danger is the lost connectivity because *you overlook the engagement*. How many people are you actually *engaged* with? What’s the point of the contacts if there is no engagement? Having a purpose and a goal to your online recruiting provides focus and can improve actual network engagement.



When using an online search engine to find someone, use his or her name and add another descriptor like city or company to make sure you narrow the search to find the correct person.

“Social media is ENGAGEMENT. Social media allows people to discover you and connect with you. It’s up to you to find out how people want to be engaged so they can become a client or you can deepen the relationship.”

John F. Nichols
Disability Resource Group, Inc.

Integrated Strategy

The most frequently used social media platform for recruiting is LinkedIn because it provides access to individual accounts, and custom networks can be built on niche markets. However, recruiting can be supported by using other social media platforms, such as Facebook and sometimes Twitter.

Facebook is not typically used to build professional relationships — it's more often used for connecting in personal relationships and communicating an organization's culture. Twitter can be seen as a news source, and some people even use it as a search engine by using hashtags as key words.

"Twitter is like being able to work the room at the end of the day. On Twitter, you can search for people seeking new opportunities. It's easier to connect with people on Twitter than Facebook and LinkedIn because you don't have to establish an official connection with that person. It's like a cocktail party; you can just engage with people. There's no spam score like on LinkedIn."

Nate Isaacson
The Guardian Life Insurance Company of America

By including Facebook and Twitter in an overall social media strategy, you can build awareness, strengthen the brand, promote the culture, and educate the community (and potential prospects) about the industry.

These platforms support the recruiting process but are not an active part of it. They are used to create "buzz" at the grassroots level to build interest in the industry and the career opportunities it offers. And, as demographic transitions continue to shift our society, these tools help reach the generations following the Baby Boomers — the next generation of industry agents, advisors, and managers.

Another advantage of using social media as part of the recruiting process is showing what tools and resources your company offers to its recruiters and advisors. Social media tools can be enticing to the candidate if they are part of the package of support they receive when joining an agency or firm.

"A great way to recruit new financial professionals is providing social media support. We show them how we are going to help them with professional photos and LinkedIn page templates. It's a lot of work so you have to commit to learn about and embrace social media. You need to get on board with it and speak passionately about it."

Janice Swanson
The Principal Financial Group



DID YOU KNOW...

Bullhorn Reach* is a software-as-a-service (SaaS) social recruiting solution, designed to help recruiters leverage social media to source candidates and identify potential movers more efficiently.

** Check with your company regarding its compliance and approval process.*

Recruiting Results

Our survey returned mixed responses on the impact of social media on recruiting results. However, our best-practices interviews revealed an improvement in both the quantity and quality of candidates. Because many of those interviewed don't track candidates by source, the data is primarily anecdotal.

Based on their experiences and activities, the interviewees reported overall positive experiences with recruiting using social media, specifically LinkedIn. Quality has improved because recruiters are reaching out to better candidates with relevant skills for the position; quantity in the pipeline has increased because LinkedIn effectively identifies prospects that fit a recruiter's profile.

"When using LinkedIn to recruit, I start sending invitations, and when they accept, I reply to them with a note identifying what about their background is a fit for the team. Eighty-three percent of those who accept the invitation turn into a phone conversation. We talk with them about their goals and see if we can get an interview. Sixty-seven percent of those we have a call with come in for an interview. Thirty-one percent of those interviewed start working with us."

Craig Long
Mutual of Omaha

The ones who see the most success are the ones who use social media consistently. For them, the better sourcing directly correlates to increased approvals for new hires.

"You need to have a tablet to be successful on social media because it needs to be convenient, or it doesn't work as well. Recruiting example: I was waiting for someone for dinner; I see three people celebrating a birthday. All three were businesswomen: two accountants and one who worked in a bank. All were interested in new opportunities. I was able to connect via LinkedIn immediately. I sent them connection requests and set up meetings with all three of them. Having my iPad ready to go made this happen because I was able to show them the profiles and make sure they were the right ones since they didn't have photos."

Georgette Geller
AXA Advisors

Another positive outcome from *recruiting through social media* is that individuals embrace the need to care for and curate online content about the firm. When people start talking about an organization online, it's important to monitor the conversations so that targeted content can be provided to the audiences. This helps build loyalty to the firm's brand and loyalty to the individual brand for the recruiter.

“Social media doesn't replace the in-person interaction. Managers still need to be out in their communities. But it does potentially give our financial professionals and managers the ability to have more powerful in-person interactions.”

**Eileen Forrest and Nicole Pesce
AXA Advisors**

Other positive results of social media recruiting are increased visibility; referrals to both prospects and potential clients; help in finding interns; and improved marketing and publicity using a single social media platform, LinkedIn.

The overall goal is to help people understand a firm and its culture and to build brand awareness, which will encourage individuals to explore the advisor career opportunity.

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Getting Started

The following framework of practices will help you develop — and leverage — your social media recruiting program.

“Regarding the use of social media: The best time to plant a tree is 20 years ago; the next best time to plant it is today. You should do it today.”

**Gary Liu, Sarah Pedersen, and Jason Suen
Hearsay Social**



Be Authentic and Respectful

The intent of social media is to build and nurture a community, not to sort résumés. It is about maintaining relationships and sharing information with your connections. Build your foundation on warm connections — you won't get very far building on cold ones.

“LinkedIn is like an electronic Rolodex and can be beneficial to your business. An underutilized feature is the ‘keep in touch’ tab. I suggest agents use this daily to see what life events are happening within their network.”

**Laura Sanders
New York Life Insurance Company**

Don't spam people with job postings. Set realistic expectations for your online recruiting plan, and remember that it takes time to build relationships and an online presence.

Your LinkedIn profile is a statement about you. It's a personal representation of who you are and not a cold third-person document like a résumé. Your profile can help you find someone perfect for your team.

Remember that there are other benefits to social media engagement than just recruiting — firm awareness, business opportunities, and more and deeper connections.

Embrace the Opportunity

Accept social media as a way to build relationships, meet new people, and enrich their lives. It's not simply one more job board.

“Using LinkedIn, you’ll build a bigger network, but you can’t sit in front of your computer all day and do it. Use it to build relationships, but you cannot use it by itself. It’s not how people buy the products we sell.”

Janice Swanson
The Principal Financial Group

4-Step Plan for Clients

Be Findable: Have a presence on all major platforms.

Grow Your Network: Make sure you are connecting with everybody you meet at seminars, community functions, events, etc.

Hear: Use social media to listen to what people in your network are posting and saying and for what is happening in their lives; then follow up with them as you would in the real world.

Say: Engage in a manner that is authentic, relevant, and timely to those you are reaching out to in the local community. Build up your personal brand because it encourages people to want to be associated with you or your company or firm and seek you out in a time of need.

Gary Liu, Sarah Pedersen, and Jason Suen
Hearsay Social

While honing your own skills, show your advisors how to build their own businesses through social media. The sooner you can get a handle on it, the better. Many agents say, “If I had done this sooner, I would have built my business so much faster.”

“Learn from your experiences. Some of the things you just won’t know until you do it. Be detailed, give yourself enough time to incorporate social media into your routine. Information seeking is important — find what is helpful and leverage social media as another communication and networking tool for recruiting. Look at what others are doing, and learn from their success and mistakes. There’s no one-size-fits-all.”

Birdia Chambers
The Prudential Insurance Company of America

Don’t be afraid of it, jump in with both feet — you won’t break the system. Have fun with it!

Build Your Team

If you need to hire a person to manage your social media recruiting program, do it. Build a team to have a successful recruiting program.

Rely on a social media vendor to manage the compliance aspect.

Get the right people at the table early on to set the correct expectations. Create the right culture and mind-set at the beginning so that your social media program can succeed. It's important to include the views of key people from the start.

“There’s a healthy and natural fear with social media; you need to learn about the audience and grow with them over time. Recruiting is not just for recruiters — it’s an entire company effort.”

Gary Liu, Sarah Pedersen, and Jason Suen
Hearsay Social

Have an organized strategy when starting; a small cross-functional team can discuss and handle social media issues that arise. Such a team will reinforce broad support and buy-in across the organization. Social media needs to be a team effort.

Lean on experts inside and outside the organization to help you roll out the strategy. LinkedIn is a great partner.

Hone Your Skills

Whatever your level of LinkedIn account, develop a strong understanding of how to best use the tools that come with it. It will save you time and provide more accurate search results. Some interviewees recommend starting with a LinkedIn Premium account; the difference in connections is notable and measurable.

Start small, and focus on LinkedIn and Facebook. Be realistic about your goals.

Stick with a well-rounded plan for content sharing online.

“Do it with a plan, and stick to it. Action always beats intent. Be successful with LinkedIn on purpose.”

Christine Guessford
The Guardian Life Insurance Company of America

Get training on using LinkedIn, and build your experience by doing it. Hone your search skills, and get experience using your search results to get the right messages to the right people.

Be consistent. Social media is not for building your profile and letting it sit there. Set up your own process and best practices, and use social media on a consistent basis.

Connect Personally

Be strategic and specific in your approach; don't connect with everyone. Be thoughtful in your process — LinkedIn becomes meaningless if you have thousands of connections who you don't really know.

Send targeted content directly to individuals; you will build stronger connections than through posting.

"I moved away from messages that appear boilerplate and started creating more personal messages based on information I see in the LinkedIn profile. By doing this, I can show the connection between their experiences and how it can support success in the industry."

Christopher Wagner
Mutual of Omaha



Cool Tool: Meetup.com:

It's like Facebook, but it houses events instead of personal pages. This can be used to find networking events to build relationships within the community. You can see who RSVPs and use LinkedIn to research their backgrounds. In this day and age, with so much to focus on, it makes sense to be strategic with your time and technology.

Convey the right message initially when you reach out to someone. This is important. When you connect, you want it to be individualized; craft messages that compel people to respond.

Phone calls are powerful tools for relationship building; pick up the phone and call your connection.

"Start connecting with people as soon as possible; get your name out there. Why? Because LinkedIn has been there for years, but how many years went by without me using it? Too many people sit back and don't learn new ways of doing things. They are missing a big opportunity. You don't know who those people are going to lead you to."

Craig Long
Mutual of Omaha

Use social media to turn your connections into relationships. At the end of the day, this is where your clients and prospects are. They are using LinkedIn, Facebook, and Twitter — and that's why you should be using these tools as well to reach them.

More Coming in 2015!

Watch for more eBooks in 2015:

- *Recruiting Females to the Advisor Role*
- *Recruiting Through Social and Community Networking*

Also NEW in 2015 ... a major research project from the GAMA Foundation —

Attracting the Right People

The financial advisor career is an amazing opportunity for the right people. But many individuals who could thrive in this profession do not want to have a conversation about it.

Why is that? And how might this wonderful profession be positioned more attractively so that the people who could excel in it would be more open to the idea?

These are the questions asked — and answered — by the three research studies that combine to bring you the newest offering from the GAMA Foundation for Education and Research, *Attracting the Right People*.

Attracting the Right People gets to the heart of the premises on which the industry's attraction and recruitment programs are built. In the process, it provides unflinching data on what really matters in attracting people who match the interests, drivers, and motivations of today's top performers.



The GAMA Foundation for Education and Research is a 501(c)3 nonprofit organization dedicated to research and education to enhance the profitability and productivity of managers who build and lead financial services and insurance firms.

Its products provide industry trends, insights, and best practices — and methods for bringing positive change to your own organization. Its valuable research is always presented in easy-to-understand and easy-to-use formats.

The GAMA Foundation thanks the following individuals for contributing to this research:

Birdia Chambers, Director, Social Business Strategy and Program Management, The Prudential Insurance Company of America (Newark, NJ)

Michael S. Conk, CFS, CRPC, CLF, Managing Director, The Principal Financial Group (Conshohocken, PA)

Eileen Forrest, Head of Sales Support, AXA Advisors (New York, NY)

Georgette Geller, Executive Vice President, AXA Advisors (Stamford, CT)

Christine Guessford, Recruiting Director, The Guardian Life Insurance Company of America (St. Louis, MO)

Harry Hofer, Agency Recruiting Manager, State Farm Insurance Companies (Overland Park, KS)

Nate Isaacson, Manager, Social Enablement & Digital Marketing, Individual Products Distribution, The Guardian Life Insurance Company of America (New York, NY)

Gary Liu, Vice President of Marketing, Hearsay Social (San Francisco, CA)

Craig Long, ChFC, General Manager, Mutual of Omaha (Franklin, TN)

John F. Nichols, MSM, CLU, President, Disability Resource Group, Inc. (Chicago, IL)

Leslie Nichols, PHR, Talent Acquisition Specialist, First Command Financial Services (Fort Worth, TX)

Sarah Pedersen, Director of Customer Success - West, Hearsay Social (San Francisco, CA)

Nicole Pesce, Director, Head of Digital, AXA Advisors (Jersey City, NJ)

Amy Salo, CFP, Head of Agency, Wealth Advisory Group LLC, The Guardian Life Insurance Company of America (Albany, NY)

Laura Sanders, Development Manager, New York Life Insurance Company (Dallas, TX)

Caitlin Sanford, Social Media Internet Recruiter, Modern Woodmen of America (Davenport, IA)

Adam Sherman, Social Media Director, New York Life Insurance Company (Brooklyn, NY)

Kurt Soper, CLF, Kansas City Agency Manager, COUNTRY Financial (Overland Park, KS)

Jason Suen, Director, Global Customer Success, Hearsay Social (San Francisco, CA)

Janice Swanson, CLU, ChFC, CLF, Regional Managing Director, The Principal Financial Group (Portland, OR)

Christopher Wagner, ChFC, General Sales Manager-Great Plains Division, Mutual of Omaha (Cedar Rapids, IA)

Eric Werlinger, ChFC, Leadership Development Associate, State Farm Insurance Companies (Minneapolis, MN)

Ani Young, Social Media Marketing Analyst, Bankers Life and Casualty Company (Chicago, IL)