

# FOUR STEPS TO SOCIAL MEDIA SUCCESS

Use social media strategically to connect with clients and build your book of business

As a financial professional, you're likely interested in finding new and efficient ways of engaging and informing your client base; connecting with your community and prospective clients; and further establishing your business as a trusted resource for financial service and insight. When used strategically and thoughtfully, social media can enhance your brand – and your business – in ways that are meaningful for both you and your clients.

We recommend following these four steps to social media success:



## 1. ESTABLISH YOUR BRAND

**Establish** profiles on Facebook, LinkedIn and Twitter.

**Include** your professional experience, credentials, education and personal interests to paint a complete picture for current and potential clients, as well as centers of influence.

**Add** a professional headshot, your logo and other approved images.

**Maintain** consistency across each of your profiles and platforms by using complementary imagery and language.



## 2. GROW YOUR NETWORK

Connect with clients, prospects, colleagues, friends, and family through social media.

**Invite** prospects and new contacts to join your network following in-person meetings.

**Look** for common connections and interests, such as alumni groups and community organizations.

**Develop** relationships with centers of influence, such as attorneys and accountants – especially those with a strong social media presence.



## 3. HEAR: FIND OPPORTUNITIES

**Listen** for money-in-motion life events – such as births, marriages and job changes – that your clients and connections share on social networks.

**Research** online to get insight on your clients' needs and interests before your next in-person meeting.

**Ask** your connections for referrals based on their social networks. Warm referrals are significantly more likely to do business with you.



## 4. SAY: DEMONSTRATE EXPERTISE

**Share** relevant content that helps your connections understand their evolving financial needs and establishes you as a trusted resource.

**Position** yourself as a community leader by sharing information about your business activities, such as community activities you support, events you are hosting or conferences that you'll be attending.

**Remember** social media is about authentic communication with your audience.

By following these simple steps, you can further enhance your brand and business.

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