

SOCIAL MEDIA UNIVERSITY:

LINKEDIN 201

TAKING THE NEXT STEP IN YOUR LINKEDIN USE

2459186



TODAY'S PRESENTATION

After going through this course, you'll know many of the best practices needed to run a LinkedIn page for your business.

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INCREASING YOUR ENGAGEMENT

Testing & Measurement on Social Media

A man and a woman are standing next to a classic teal car. The man is holding a smartphone and showing it to the woman. They are both wearing sunglasses and casual summer clothing. The background shows a scenic view of the ocean and a rocky coastline under a bright sky.

BE A THOUGHT LEADER

Sharing content that creates advocates

SOCIAL MEDIA GOALS

When considering social media's use in the financial services industry, there are three things we're trying to achieve. After going through our Fundamentals and LinkedIn 101 courses, you've become Discoverable & Available. Now, we need to focus on content to become a thought leader.



BE DISCOVERABLE
AND AVAILABLE

Generate authority and become a
searchable, verifiable business



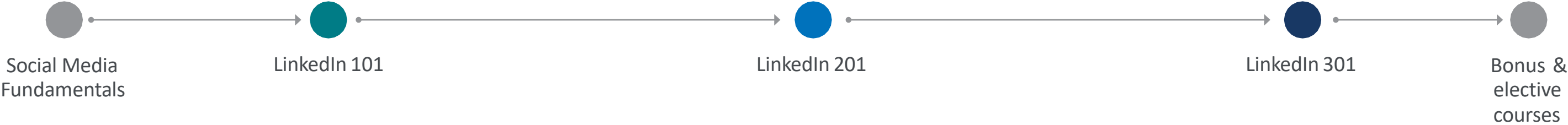
BE A THOUGHT LEADER
AND CREATE ADVOCATES

Post content to build strong
relationships with existing clients



GENERATE LEADS WITH
ADVANCED FEATURES

Advertise to attract potential
clients and recruits



CREATING SMART CONTENT

The first thing we need to consider when running a social media account is content. Content is what will inspire users to follow you. It's the key to success. If the content you create doesn't entertain or provide value to your followers, your content will be ignored.
#ItsAllAboutTheContent

So before posting anything, first ask yourself "would my followers care about this content?" In order to win the attention war and create content that's truly "thumb-stopping", one must remember the following...



**BE USEFUL,
BE ENTERTAINING,
OR BE IGNORED**

CONTENT TYPES

With that in mind, let's look at the kinds of content we can post. In general, there are two types:



SHARED CONTENT

Companies like Transamerica are constantly creating new social media posts – often linking back to valuable articles. If you find a piece of content you like, simply hit the share button. Make sure to check with your legal council to determine approved authors for sharing, as well as your ability to alter the post when publishing.



ORIGINAL CONTENT

Content you create yourself is a great way to connect with your followers. Only you know what your individual clients like to learn about, and only you can showcase your personality. We advise getting this content approved by your legal team prior to publishing.

LinkedIn also has a unique blogging feature. Instead of posting a regular “timeline” post, you can write a long-form blog that lives on your account. If you have an individual perspective to bring to the world of finance, this may be something to consider.

CONTENT BEST PRACTICES

Whether you're sharing or creating, there are a few best practices to keep in mind when it comes to publishing content:

POST TWICE A WEEK

This allows for multiple opportunities to gain engagement, while not overwhelming your followers. That said, if once a week is less stressful, do that.

ALWAYS INCLUDE A CTA

Whether you're asking your followers a question or telling them to click on a link, a call-to-action (CTA) helps them know what to do.

USE COMPLIANCE-APPROVED CONTENT

Always make sure to get approval on your original content prior to publishing. Want to make your life easier? Try sharing content from the Transamerica, Transamerica Agency Network, and Transamerica Financial Advisors, Inc. LinkedIn pages. All of that content is already 100% approved.

DON'T POST AT 2AM

Try posting at times your followers might be on their phones. In the morning or during lunch hours are typically good times to hit.

PROFESSIONALISM IS KEY

As long as your content is professional in nature, the execution can vary. While it's best to include a video, infographic, or high-quality photo, you could post with only text as long as you tell a captivating, professional story.

TRY TO BE TIMELY

Due to compliance, it can feel impossible to post about timely topics. That's not entirely true. Try posting winter-based ideas in the winter. Or tax-related topics in March. There are always ways to plan ahead.

CONTENT TOPICS

When thinking of content to share or create, think about your followers. By providing them with content they find valuable, you show them you put their interests first. You create a unique experience – which can turn your clients into advocates. Try sharing the following types of content:



EDUCATIONAL CONTENT

Content focused on educating your clients. These posts show that you care about more than people's money – you care about their future.



INDUSTRY CONTENT

Content highlighting news-worthy items in your industry (and your perspective on them) or any news specific to your company.



COMMUNITY CONTENT

Content covering your personal experience at a conference or an event you (or your office) are hosting. Showcase your community involvement!

CONTENT TOPICS - EDUCATIONAL

LinkedIn users love to learn, and insurance and finance are complicated topics. By educating your clients, you're not just their agent, you're their financial guru. Simply share content from the social pages of Transamerica, TAN, or TFA – or from our Knowledge Place blog.

EXAMPLES:



Transamerica
64,725 followers
2mo

Protect your clients and their family by informing them that private student loan debt is not erased. Talk to your clients today!

DID YOU KNOW ...
STUDENT DEBT CAN PASS ONTO YOUR FAMILY

If you have private student loans ... and something happens to you before they're paid ... that debt gets passed to your family.

LIFE INSURANCE AWARENESS MONTH

Like Comment Share



Transamerica
64,725 followers
3w

Make sure your client is prepared for the journey of senior caregiving. Click the link in order to help your client prepare.



What to Do When Your Client Needs a Caregiver - New Age of Advice
transamerica.com

Like Comment Share

WHAT NOT TO DO:

- Talk about specific products
- Alter the copy of the post you're sharing (unless given approval from your legal team)
- Make promissory statements

CONTENT TOPICS - INDUSTRY

LinkedIn is not just a popular platform to consume news, it's an especially popular platform to consume financial news. If there's a particular story you think your followers should know about, and you can provide your own point-of-view on the story, this is a great place to share those out.

EXAMPLES:



WHAT NOT TO DO:

- Post stories from only one news source – don't be news biased
- Post, or comment on other posts, about religion, politics, or other controversial topics. While you're entitled to your opinion, remember that your account is officially affiliated with your brand.

QUICK TIP: When posting content like this, make sure the source you're sharing from is a trusted source. Make sure to check with your compliance team.

CONTENT TOPICS - COMMUNITY

Showing that you're involved with your communities is a great way to gain support. By posting about local events, volunteer experience, or your involvement within the financial community, your followers will see you care about bettering yourself and others – a very admirable quality.

EXAMPLES:



WHAT NOT TO DO:

- Post photos of other people without their permission.
- Post slides from any presentation at a conference or convention. Most likely these slides were not approved for public use.

QUICK TIP: Always make sure the photos you use aren't copyrighted. Use sites like Pexels or Pixabay to find free photos, royalty free. These high quality photos are great to use on LinkedIn.




TURNING COMMENTS INTO CONVERSATIONS

The art of community management

CONVERSATION MANAGEMENT

When your content begins to get engagement, the opportunities to create conversations will arise. These conversations can eventually lead to sales, so they must be taken advantage of. Below are examples of comments you may see:

WARM LEADS

 **Nils Thorson - Transamerica Agency Network**
April 1 at 8:31 AM · 🌐

If you're considering life insurance, you may not understand the difference between term and perm. Transamerica is here to help.
<https://goo.gl/WpdgX>

DIFFERENCES IN LIFE INSURANCE


TERM OR **PERM**

TERM LIFE INSURANCE PERMANENT LIFE INSURANCE

Term life insurance policies provide coverage for a set time, or term, and build no cash value. Permanent life insurance policies are in effect throughout the policyholder's life as long as premiums are paid.

Talk to a financial professional to learn how life insurance types can work for you.

👍 Like 💬 Comment ➦ Share

 **John Odde**
This is really helpful!

👍 💬

COLD LEADS

 **Nils Thorson - Transamerica Agency Network**
April 1 at 8:31 AM · 🌐

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Talk to a financial professional to learn how life insurance types can work for you.

👍 Like 💬 Comment ➦ Share

 **Tim Johnson**
Kerry Johnson

👍 💬

CLIENTS

 **Nils Thorson - Transamerica Agency Network**
April 1 at 8:31 AM · 🌐

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Talk to a financial professional to learn how life insurance types can work for you.

👍 Like 💬 Comment ➦ Share

 **Kathy Hoeger**
Thanks for sharing!

👍 💬

ANGRY USERS

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April 1 at 8:31 AM · 🌐

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👍 Like 💬 Comment ➦ Share

 **Steph Schmidt**
Life insurance is a scam.

👍 💬

CONVERSATION MANAGEMENT

WARM LEADS

Positive comments or messages coming in from non-clients is the ideal situation. Take advantage! Respond quickly and move the conversation to a place where you can have the most descriptive, effective conversations: email and phone.

EXAMPLE

Nils Thorson - Transamerica Agency Network
April 1 at 8:31 AM · 🌐

If you're considering life insurance, you may not understand the difference between term and whole life. Transamerica is here to help. <https://goo.gl/WPdtqX>

DIFFERENCES IN LIFE INSURANCE

TERM OR **PERM**

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Term life insurance policies provide coverage for a set time, or term, and build no cash value. Permanent life insurance policies are in effect throughout the policyholder's life as long as premiums are paid.

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Like Comment Share

John Odde
This is really helpful!

EXAMPLE CONVERSATION

John Odde
This is really helpful!

Nils Thorson
I'm glad I could help! And it's nice to meet you, John! Are you also in the Denver area?

John Odde
This is really helpful! I am indeed. My family and I just moved here a few months ago.

Nils Thorson
Well welcome to Denver! Where are you moving from?

John Odde
We moved from Dallas.

Nils Thorson
Very cool. Hopefully the winters aren't too cold. If you're interested in chatting about insurance, or just Denver itself, I'd be happy to talk! If so, send me a private message and we can chat.

KEEP IN MIND...

- Don't sell too hard. People don't want a sales-y agent, they want a neighbor who happens to be an expert.
- Take the conversation off social relatively quickly. Social media is public, and there are many things you can't legally discuss. Move the conversation to email or a phone call.

CONVERSATION MANAGEMENT

COLD LEADS

More neutral comments from non-clients need to be addressed with care. Don't scare them away by pushing a sale too hard. Instead, make them feel seen and heard. If you'd like, let them know you'd love to buy them a coffee for a quick conversation.

EXAMPLE

Nils Thorson - Transamerica Agency Network
April 1 at 8:31 AM

If you're considering life insurance, you may not understand the difference between term and perm. Transamerica is here to help.
<https://goo.gl/WpdqX>

DIFFERENCES IN LIFE INSURANCE

TERM OR **PERM**

Term life insurance policies provide coverage for a set time, or term, and build no cash value.

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Talk to a financial professional to learn how life insurance types can work for you.

Like Comment Share

Tim Johnson
Kerry Johnson

SUGGESTED MESSAGES

Tim Johnson
Kerry Johnson

Nils Thorson
Thanks for commenting, Tim! I'd be happy to clarify anything. Do you or Kerry have any questions about this?

Tim Johnson
I don't have any further questions at this time. Thanks!

Nils Thorson
No problem. I'm always happy to help. If you or anyone you know has questions about life insurance or financial protection, I'm always happy to chat about it over coffee. I'm buying! ☺

KEEP IN MIND...

- Address their comment in a customized manner. Don't reply with a canned answer that ignores what they said in the first place. Use proper grammar and don't abbreviate too much (lol, thx, etc.).
- Don't overly push. Simply let them know that you're here for them.

CONVERSATION MANAGEMENT

CLIENTS

If your clients respond to you, make sure to create a conversation. By commenting, they're letting you know that they're open to a dialogue. Make sure that openness isn't met with a cold shoulder.

EXAMPLE

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April 1 at 8:31 AM · 🌐

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1542,89038

Like Comment Share

Kathy Hoeger
Thanks for sharing!



SUGGESTED MESSAGES

- Kathy Hoeger**
Thanks for sharing!
- Nils Thorson**
You're welcome, Kathy! I hope you're doing well. How was your trip to Disneyworld?
- Kathy Hoeger**
Our trip was great! The family loved meeting all the characters. Thanks for asking!
- Nils Thorson**
Of course! I'm glad it went well. And by the way, I have more infographics like this fi you felt it was helpful. Just let me know!

KEEP IN MIND...

- Create a conversation! They proactively reached out to you. Do your part and respond in a way that creates dialogue.
- Don't forget why they reached out. Having the conversation is what relationship building is all about, but make sure you address the fact that they commented on a specific piece of content.

CONVERSATION MANAGEMENT

ANGRY USERS

Unfortunately, human nature is to complain. You may get angry users (or trolls) commenting on your posts to vent about something. Don't return the anger, and don't delete the message unless there's profanity. This is an opportunity to show your followers how you deal with pressure.

EXAMPLE

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April 1 at 8:31 AM

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Like Comment Share

Steph Schmidt
Life insurance is a scam.

SUGGESTED MESSAGES

Steph Schmidt
Life insurance is a scam.

Nils Thorson
Hi Steph, I'd love to hear why you feel this way. Did you have a particularly bad experience in the past? Send me a message if you'd like to chat.

OR

Nils Thorson
Hi Steph, oh no! I'd love to better understand why you feel this way. Feel free to send me a message if you'd like to discuss further.

OR

Nils Thorson
Hi Steph, I'm sorry you feel this way. Is there any way I can help? You're welcome to send me a message if you'd like to discuss this in more detail.

KEEP IN MIND...

- Take the high road. Every time. Be polite and respectful.
- Get the conversation to a private message. Don't give them an opportunity to continue publicly commenting.
- Most importantly, please refer to your legal and compliance guidelines regarding complaints

A photograph of two young women with long dark hair, smiling and looking at a smartphone held by one of them. They are outdoors, with a blurred background of greenery and a distant town. The woman on the left is wearing sunglasses and a grey tank top, while the woman on the right is wearing a white off-the-shoulder top. The overall mood is positive and social.

INCREASING YOUR ENGAGEMENT

Analytics and measurement on social media



MEASUREMENT

DON'T WASTE YOUR TIME

In marketing, we use data to inform us which messages our audiences react positively to, and which they don't. If you continue to use the same advertisement, and that advertisement isn't working, you're wasting your time. And maybe your money.

YOU DON'T NEED TO BE A MATHEMATICIAN

But don't worry! Looking at LinkedIn data isn't hard. It's fast and easy. You can easily learn which posts are working and which aren't. Then, simply continue doing the things that work!

Looking at some key numbers will help you understand what's working. Below is an example of a LinkedIn post, and some of the numbers you should keep track of.

- VIEWING YOUR ENGAGEMENT

To view the details of your post's engagement, click on the small graph icon located below the like, comment, and share bar. This icon tells you how many views your post received and opens the analytics for your post when clicked.

- POST REACTIONS

The number of like, celebrate, love, insightful, or curious reactions that users had to the post.

- POST VIEWS BY ORGANIZATION

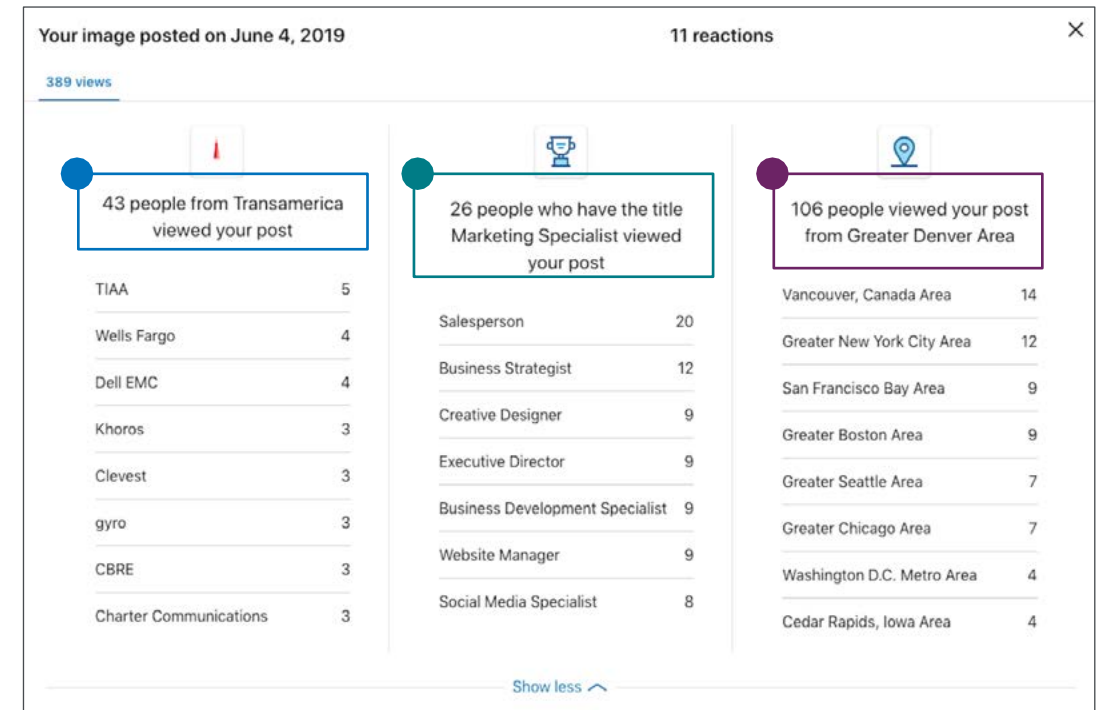
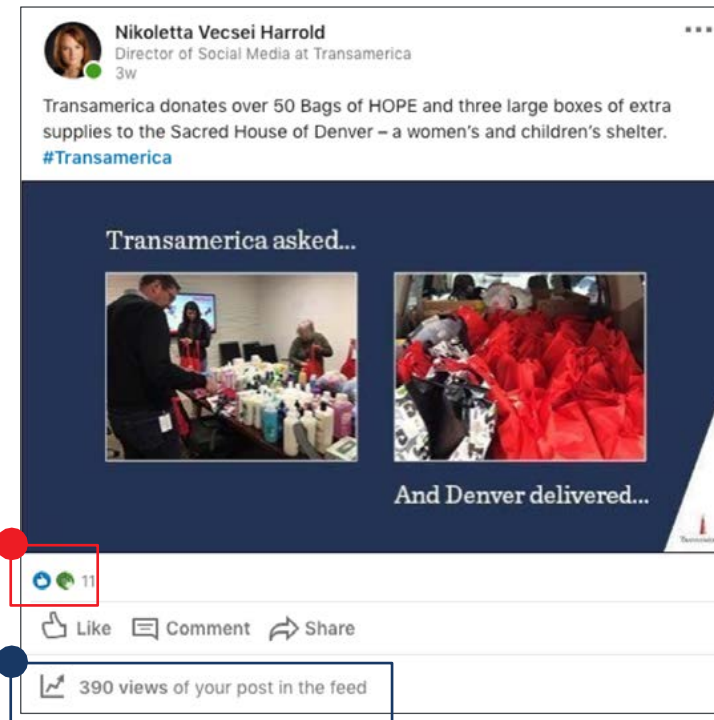
Who your viewers work for.

- POST VIEWS BY JOB TITLE

The job titles of your viewers. Keep an eye out for which job titles view your posts the most.

- POST VIEWS BY LOCATION

The locales of your viewers. Are they close to home from you or further out?



Once you feel comfortable looking at this data, try finding patterns in the posts with higher levels of engagement. There are a few things to look for:



POST TOPICS

Perhaps posts talking about a certain topic performed better. Did people love when you shared about your family outings? Or when you posted educational pieces?



POST VISUALS

Visuals can make a huge difference on LinkedIn. Maybe the infographics you shared from Transamerica did well. Or maybe the videos you're making are your top posts!



POST TIMING

Your followers might be more active at certain times of day. For example, your morning posts might do better than your afternoon posts because your followers are hard at work in the afternoon.

QUESTIONS?



THAT CONCLUDES OUR LINKEDIN 201 COURSE

- If you'd like to learn more about LinkedIn, take our LinkedIn 301 course or any of our LinkedIn elective courses.
- If you have any questions about what you can or cannot do on social media, ask your local legal council.
- If you have any questions on social media strategy or have any feedback on this course, feel free to email the Transamerica social media team at socialmedia@transamerica.com.



THANK YOU

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