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The Indispensable LinkedIn Sales Guide for Financial Advisors: Mastering the Online to Offline Conversion

Kevin Nichols, Matt Oechsli

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Would you like to acquire more affluent clients with the help of LinkedIn? If so, this book is for you. When used properly, LinkedIn is a tool that has enabled a small cadre of financial advisors, referred to throughout the book as Influencers, to make social selling a core part of your business development efforts.

The Indispensable LinkedIn Sales Guide for Financial Advisors is a step-by-step guide that can transform a LinkedIn novice into a LinkedIn master, while at the same time help a LinkedIn master take their social selling skills to the next level.

By combining research from three separate studies on affluent investors, elite financial advisors, and social media in the financial services industry (labeled as the Trifecta of Research), the authors create a financial advisor roadmap on how to use LinkedIn to help acquire more affluent clients.

For instance, you will learn that the personal introduction is the #1 marketing tactic to which today s affluent respond and learn how to orchestrate these types of introductions using LinkedIn. The authors refer to this as the Online to Offline Conversion or the O-2-O ConversionTM. They will teach you financial advisor tested techniques on how to engage in advanced searches, join and form groups, properly engage with your connections, and brand yourself as a first class professional.

Each chapter focuses on an area that is important to mastering LinkedIn social selling, and goes into granular how-to detail. For instance, the chapter on Advanced Searches covers everything from Finding Business Owners to understanding how to use Boolean Logic, to how to find Money in Motion, and much more.

Social media has become an indispensable research tool for Influencers and the technology is only getting better. Welcome aboard our social media journey. The fun has just begun.

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