



LinkedIn: Advisor Optimization Guide

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The ROI that you get from LinkedIn will be a direct result of your strategy, execution and consistency. Within this document you will find the tactics and strategies to make LinkedIn a valuable asset to develop your business.

LinkedIn Action Plan - Weekly Checklist

Directions:

Block out one hour on your calendar **each week** to complete the following seven tasks. By putting in an hour of focused work per week, you'll see your LinkedIn business grow exponentially.

Note: Critical weekly items are ranked 1-3

1. Have you **connected with 5 new prospects** or clients this week?
 - (Pro Tip: Search for 2nd Degree Connections of top existing clients -> [How to Search](#))
2. Have you **sent 5 private messages** to prospects or clients this week?
 - (Pro Tip: Send value-add message based on person's interests - see bottom of profile)
3. Have you **shared 1 piece of content** that's curated for your ideal client?
 - (Pro Tip: Share a post unrelated to finance – i.e. client event, TED Talk or podcast)
4. Have you **Liked or Commented on at least 3 pieces** of your client's or prospects content?
 - (Pro Tip: Go to the "Recent Activity" section of a prospect's profile to find their posts)
5. Have you wished **Happy Birthday** or congratulated people on **promotions/ new jobs**?
 - (Pro Tip: New jobs can result in rollover opportunities)
6. Have you **followed up with 1 person** who hasn't gotten back to you about meeting?
 - (Pro Tip: Look for their email in their profile "Contact Info" to increase response rate)
7. Have you **organized all important leads** that you want to stay on top of?
 - (Pro Tip: Use a free CRM like [Hubspot](#) or upgrade to "LinkedIn Sales Navigator")



Profile Optimization – Differentiate Your Brand

1. Do you have a **Professional Headshot** that represents what you look like now?
 - (Pro Tip: Professional headshots get 14x more views than others)
2. Does your **Profile Headline** succinctly explain the problem you solve and for who?
 - (i.e. “Taking the Confusion Out of Retirement Planning for Physicians” -> [How to Edit](#))
3. Does your **Profile About Section** explain who you are and what you do?
 - (Pro Tip: Use this as an opportunity to explain WHY you do what you do)
4. Is your **Contact Info** up-to-date and your **URL personalized**?
 - (i.e. URL should read [linkedin.com/in/FirstNameLastName](#) -> [How to Edit](#))
5. In the **Job Experience Section**, do you describe your current responsibilities in detail?
 - (Pro Tip: This description should not be longer than two paragraphs)
6. Do you have 3+ **Recommendations** from existing or past clients?
 - (Pro Tip: Check with Broker/Dealer Compliance team to see what’s allowed)
7. Do you have a clear **Call to Action** for profile visitors to take?
 - (Pro Tip: In your About Section add a website link, email address and phone number)

Pro Tip – How to Hide Your Competition

Follow the steps below to remove the “People Also Viewed” Section of your profile.

1. Click the “Me” icon at the top of your LinkedIn homepage
2. On the dropdown menu click “Settings & Privacy”
3. Select the **Privacy** tab at the top
4. In the **Profile privacy** section, click **Change** next to **viewers of this profile also viewed**
5. When prompted, toggle to the left to select “No”



Advanced Search – Master Advanced Search

Directions:

Your LinkedIn network is only as good as the searches you conduct and the connections you make. Use the steps below to learn how to find prospects in your target niche.

1. From the LinkedIn homepage, type [one search criteria](#) (i.e. CFO) into the search bar at the top of your screen and then click the [magnifying glass](#) to begin your search
2. Click [“All Filters”](#) near the top right of the screen and you’ll see a list of filters
3. You will see a number of [Filters](#) you can use to improve your search and hone in on your target niche. Here are some of the [best filters to use](#):
 - a. **Connections:** Check the box next to [“2nd”](#) to filter down to people who share a mutual connection with you. When you use this, your search will only show connections of your current connections.
 - b. **Connections Of:** Use this if you’d like to search for people through one particular connection of yours. For example, if you have an amazing client named Jenny Smith, you can add her name in that filter and only search for people in her network.
 - c. **Current Companies:** Know which company you want to target? Filter down to employees who currently work at the company of your choice
 - d. **Schools:** Want to find a fellow alumnus? Use this filter to find people who graduated from a particular university
 - e. **Title:** Want to find people who have a particular job title? Search for one or multiple job titles using this useful feature
4. After you select the right filters, click [“Apply”](#) to run your search.
5. Once you get a set of great search results, you’ll want to save them for use later. See the section on the next page on [How to Save Searches and Get Email Alerts](#).



Boolean Searches – Take Your Search Game to the Next Level

To improve your search results even more, you'll want to learn how to use Boolean logic. Below are some examples of what Boolean is and how to use it to search on LinkedIn.

1. **Quoted Search:** To search for an exact phrase such as Chief Financial Officer you will want to put parentheses around the term like so: **"Chief Financial Officer"**. This will prevent unrelated positions like Chief Operations Officer from popping up
2. **NOT Searches:** Do you have a search that keeps coming up with bad results? For example, maybe you want to find an "Executive" but not an "Executive Assistant." In order to filter out the assistants, you'll want to type in **"Executive NOT Assistant"**
3. **OR Searches:** Are there multiple targets you want to pull up in one search? For example, perhaps you want to find Accountants or CFO's. Type in **"Accountant OR CFO"** to pull up results for both positions
4. **AND Searches:** Do you want to find someone who has multiple credentials? For example, maybe you only want to pull up Accountants who are also CPA's. You will want to type in **"Accountant AND CPA"**

Pro Tip – Save Your Search and get Email Alerts

1. From the LinkedIn homepage, type **one search criteria** (i.e. CFO) into the search bar at the top of your screen and then click the **magnifying glass** to search
2. Click **"All Filters"** near the top of the screen and you'll see a list of filters
3. Select all the filters that you'd like to use and then click **"Apply"**
4. When the list of people populates you will see a box in the top right of the screen that says **"Saved searches."** Under that, click the button that says **"Create search alert"**
5. A box will pop up that will ask you whether you want to get notified via email about search alerts. **Check the box** next to Email and then click **"Save."**
6. You now **have a saved search** and will **receive weekly email reports!**