

Shawna Ireland:

All right, we're right at 1 o'clock, so we'll get started. I just want to welcome everyone today to the first of two sessions that are really geared to expanding our knowledge of social media so we can target our efforts to get the results that we want. Today's session really focuses on expanding the learning from the Hootsuite courses *Social Media and You*, as well as *the Platform Training* course which is more of a how-to.

So, I hope you completed the learning. But if not, don't worry, you'll be able to follow along and you'll still get lots of value from this session today anyways. Just as we go, I've got a couple people from field marketing monitoring the chat. So if you have any questions as we go, this is not a space of rigidity, so you can feel free to raise your hand or unmute and ask a question or share a thought or comment. You can also type in the chat. If you have a question that you'd just rather put it in there, then you can go ahead and put it in the chat and we'll monitor it as much as we can. And then we'll have a time at the end for a Q&A. My apologies if my voice isn't as smooth as usual. I have a little bit of a cold, so we're working on it. But yeah, feel free to unmute or type in the chat, and we'll get rolling here.

My name is Shawna Ireland. I am actually from the Advisor Development team at Canada Life, and I've been there since June of 2022, this past year. But I've been an advisor since 2016 and I've been in the business since 2014. My passion is really in helping advisors connect with people, use technology and facilitate growth in their practice.

We'll go through a bit of what today looks like. First, we're going to talk about some platform training, some how-tos, and I'll do a demo on that. Then, we're going to talk about a case study of two different advisors as we go through the learning. Then, we're going to talk about what does influence mean online, offline, what does it mean to be influential. We're going to talk about the purposes of different platforms and what we might want to post there. Then, we're going to talk about the rule of thirds which is the easiest way to discern what am I going to post and where. And then, we'll go through some Q&A at the end. Again, you can continually ask questions throughout or just unmute yourself or use the chat.

I'm going to begin with a review of the *Platform Training* course. It begins sort of beyond the basics of setup. So if you need to get things set up, please go to the Digital Toolkit site, you'll find all the resources that you need to get started. I want to throw out a question: What are the challenges that you're experiencing using Hootsuite, Amplify, and in social media in general? You can go ahead and unmute or use the chat, but what are some challenges that you're facing? And we'll start there.

Is anybody having challenges with time constraint or with knowing what to post or where? Rachel just put in the chat. If you're not signed up for Hootsuite yet, you can go to the link and it will show you how to do it. She's got that link in the chat. Thank you, Rachel. "My challenges with Hootsuite is the Story design and posting on Instagram." Amy, do you want to elaborate on that a little bit? So is it the design of the Story itself or getting it over to Instagram properly in a story?

Amy:

Yeah. Hi. It's both. I would say the design of the Story is hard to do because a Story essentially needs to be done in Instagram itself. So then I need to make the Story in Instagram, save it, then go put it into Hootsuite, and then I need to schedule it to post. And then when I schedule to post a Story, then Hootsuite sends me a notification, which means on Saturday morning at 8:00 AM, I have to be on my phone ready to get that notification and then do the post. So I might as well just do the Story post and not even use Hootsuite, is how I feel about it.

Shawna Ireland:

Yeah, for Instagram Story. That's a newer feature that they've added that I think that they haven't sorted out the entire experience for yet. So I think that they will increase how smoothly it goes over time once they're more comfortable with the Instagram, with the Stories in general. Same with TikTok. They just introduced TikTok, as well. So hopefully they'll get a little bit smoother on that. I'm not the expert on the Instagram Story, but maybe I will see if Jared from Hootsuite could offer some comment on that towards the end, see if he can offer what's happening as far as the Hootsuite Stories or Hootsuite Instagram Stories and see if he has any insight from Hootsuite perspective as a company. Somebody had their hand up. I can't see who that was. Somebody had a hand up.

Jared:

That was me, Shawna. It's Jared from Hootsuite here.

Shawna Ireland:

Oh, hi.

Jared:

How are you?

Shawna Ireland:

Good, how are you?

Jared:

Yeah, I was just going to quickly hop in and answer that question. Right now, Hootsuite's very kind of at the discretion of where the APIs are with Instagram. Meta is... they're very open with Facebook, but when it comes to Instagram, they're still working quite a bit to make that more open for the social media platforms in general. So pretty much every social media platform out there is going to have that push workflow with Instagram. We are working pretty closely with that team to update that. So I'd say it's definitely a priority on our roadmap, it's just waiting for them to make that available for us. So, I would definitely expect, at some point, hopefully early next year, for that to be a better workflow for both regular publishing, Stories, Reels, et cetera.

Shawna Ireland:

Thank you, Jared. Does that help a bit, Amy?

Amy:

Yes, I am excited to see that come out.

Shawna Ireland:

Me, too. Okay. Well, we'll continue on and talk about some platform training. We're going to go through Amplify, which is the pull and post. We can pull third-party articles as well as Canada Life content. We're going to go through using the quick post, and I'll tell you a little bit about the app, which is phenomenal. And then we're going to go through Bulk BETA just for a minute so I can show it to you because some people might be interested in it. Especially firms or people who are doing campaigns or batching content, this is a really great way to do that, even if you're just doing seasonal content, like happy holidays and things like that. And then we'll go through Streams, which is a way to monitor activity, monitor some inboxes, and monitor all of your top prospects, companies, hashtags, topics, anything that you might want to be keeping top of mind with without having to switch through platforms.

So, it's a little bit of the how-tos, but stick with me, there's some value here because later on, we're going to talk about what kind of posts we're going to make and when you would do that and how. But you already know how to do it because we've gone through the training already.

So, let me just share. I will share my Hootsuite with you. Okay, there we go. Can everybody see Hootsuite clearly, just before I go on? Give me an okay.

Speaker 4:

Yep, looks good.

Shawna Ireland:

Okay, thanks. You never want to get into something and then you realize your screen didn't share. It would be terrible.

Okay, so when you get into Hootsuite, you obviously have your side panel here that has all your buttons for places to go and things to see. I'm going to start with Amplify, and this is this one here. So go here, and you can obviously sort your content. Rachel has gone over this before about how to sort your content and everything. So this is where you're going to get that, pull and post content. This is going to be content for third-party articles as well as Canada Life articles. This is the fastest way to share articles, share links, share thoughts, especially when you're talking industry-wide, when you're talking about things that are what we would call thought leadership. So talking about the industry, where is the industry going, what are your opinions about recent news, all those kind of things that can kind of differentiate you, this is where you can find all of that.

You can see they've added some new features actually in the last few weeks, or months maybe, where it shows you the topics. So you can quickly go to the topics that are relevant for you and for your prospects. Retirement, insurance, all those kind of things. So you'll see that there's education even, savings and investing. So, they'll show you some content that's third-party content, but they'll also show you some content that's an article or a pre-made post, and they'll show you here it says CL content. So you can see here that this is created by Canada Life. So, it's just good to know what you're sharing, is it a third-party article? Or you can see here, this one is CL content and this is about offering benefits. So obviously I would go ahead and watch the video, but I want to see what's the rest of this verbiage down here because I'm going to share it. So I'm going to go see more. And it says, "As a small business owner," it shows me what the rest of the verbiage is, and I like that because I want to work with small business owners and I want them to get benefits. So what I'm going to do is I'm going to go share, and I can share it immediately by going *Share now* or *Schedule*. But what you really want to do here is... It's great to share content, but you really want to personalize it. The difference between good to great is: sharing something, a relevant article that people might want to read is good, but great is sharing a relevant article or something that people might want to read or something they need to be aware of with your own context, your own thoughts, your own opinions, your own outlook, asking thoughtful questions to your prospects or to clients. This is really where you can differentiate yourself, whether you're using third-party content, articles you've written, or Canada Life content.

Canada Life content is great because it creates a beautiful post because Canada Life spends a lot of money on digital marketing – so why not use it, right, and share their content. So basically, you would go in above here and you can see the nice verbiage that they've added about how it's important to offer basic benefits. But I want to add my own thoughts because I work with a lot of business owners, I want to share how I think business owners need to be competitive in the market. So I would add my own verbiage up here. And you can see the preview over here of what it looks like as a small business owner and you'll see all of the preview over here as it comes.

And then you can just auto-schedule it or you can schedule it yourself, which is fine. So you'll go schedule and then it will schedule into your calendar. There we go. I'll go down and show you. You can look at your calendar in a few different ways. You can look at it as a calendar itself or you can do this, which is looking at a list, which I find very, very helpful. So that way, you can see all of your posts that are coming up. This one was one that I had made, and that's the post about benefits. So I said, "Statistics show that benefits can weigh similarly to salary in the decision to select an employer. How are you staying competitive in today's employment market?" And then your hashtag, and that's it. And you've got a beautiful video there and that's your post. I'll delete that one. And you really should be and can be posting this every day, every two days. You can schedule these all at once. That took maybe two or three minutes to make. So you can do that all on a Monday morning or Friday morning and have it all done and ready to go so that you have posts going out through the week with your own thoughts about what's happening and you don't have to keep going back to it. So you don't need to be making a post every day, that's the whole point.

But I will point out next, obviously, the post. So how do I make a post? I want to make my own post. And there's a few things that we need to make sure that we're including in our post, and that is a photo, a link, comment and hashtag. So, I want to make a holiday post, so I'm going to search... I'll search because I want this one to be a Christmas post, so I'll search for Christmas. I'm going to pick this one, it's going to be part of my holiday posting, and I'm going to put in my verbiage here, "From our team at ABC Financial." So then I've got my verbiage. I could probably put a little bit more, a little bit more expressive. And then "Happy Holidays." And then you also need a link. Whenever you're posting something, put a link, even if it's to abcfinancial.ca. That's my website. Or I'm linking it back to my booking page or I'm linking it back to something that we're doing in the community, our events page or a blog about something about holiday time. You always want to be including your commentary, your link, your hashtags, all those things, and a photo.

And what's great is when I use the media library, it'll come up with hundreds of photos for you. So if you're creating a campaign about homeownership, if you're talking a lot about people buying houses or you're very interested in getting into mortgages and term insurance for the economic grower, you're really going to want to focus on those kinds of posts, then

you can pick a great photo of houses. They have photos of keys, a welcome mat, all the things that you can talk about what's happening in the mortgage market. Even a short blip about some recent news or your own thoughts or a client story along with a photo and a link to your booking page or a link to your campaign page or something like that, it's phenomenal because it creates such a beautiful post for you. So, here's my post here. It's my small holiday post. I can go ahead and schedule that, but I won't. You get the idea.

After that, I will show you something that may be of interest to some people, but I'll point it out briefly. What I'll show you is called Bulk BETA. We'll go here and we'll go to *Content*. It's a way to create up to 300 posts at once. That seems extremely overwhelming. Don't worry, it's really not. You can create up to 300, but you can create 10. So don't panic. Basically what it does is it takes information from an Excel sheet, of which they provide a template. It takes information from an Excel sheet and turns it into posts. I'll show you what that means briefly. This would be of interest to people who are going to be doing active campaigns, where they want to be sending out 4, 5, 10 different posts, they want to be doing RRSP season, they're talking about TFSA's, they're doing a campaign about TFSA education, they're doing a campaign about their branding and their brand-discovery process. Any kind of campaign, seasonal, anything where you think you would be putting up a lot of the same kinds of posts, this could be really useful. And it's actually really easy to use. So if you have support, you could use this with support people really easily.

They give you an example, actually, to download, like a template. So we'll download the template. I'm going to show you the template. There it is. I'm going to show you the template here. Basically it's the date and time, the comment, a link, and that's pretty much it. So if you look here, it has four of them with a comment and then a link that they've attached. One of them has no link, that's fine. So, what happens is, I downloaded the example, but I'm going to change it to be my own comments, my own link, my own date and time, which you can do later, don't worry. Now I'm going to upload. Here we go. Okay. And we're back to the *Bulk composer*. So I'm going to select the file to upload, which is the one I just downloaded, and it's got just that information in the Excel sheet. And here, it's made all the posts for me. So I've got my comments, I've got my link, and it's made the post, so I can just edit it. And I'm going to pick a photo from the media library and I'm going to preview it, and this is what it looks like. So, you could create a ton of posts at once. This is also great if you have photos that you want to upload and you've been to an event, you want to do a bunch of different posts. Maybe you've been to a whole event over two or three days, networking event, you can do that that way. So I wanted to show it because it might be useful to some people and then you just go ahead and schedule each one.

And the last thing is Streams. We've seen this before, but Streams is basically a really easy way for you to monitor multiple different platforms. You can search people, you can search hashtags, you can search topics, you can search companies, prospects, small businesses, anything. And then you can set it to monitor it so that... if you're on Twitter, you can monitor a bunch of different hashtags or people on Twitter, and if you want to engage with something and it pops up on your Twitter, you just retweet from right there. There's a lot that you can do right from the dashboard, but it's a really good way for you to do what's called social listening, which is not the posting part, it's the listening part where you're listening to what are the people engaging with that you want. If you want them to engage with you, what are they engaging with, then you need to be listening. Streams is a great way to do it. And you can have all different dashboards, you can add a new dashboard, you can do a Twitter quick search. There's all kinds of different things that you can do with it. And it will also help you find new content because as you're following these topics and hashtags, you'll come up with articles and things that other people are writing and other people are posting and you can just share it right from there. Or you can make a post about it in Hootsuite, obviously, giving them credit if they're the original sharer or poster. But, it's a great way to cut down on monitoring all kinds of different platforms that can be a bit onerous. So, just wanted to point that out. But I will complete the tutorial session there and we will continue on.

Does anybody have any questions so far about what we've covered so far? Feel free to type in the chat or unmute yourself.

Oh, Martin asked, "Will this presentation be available for review?" Yes, it will be. We're recording it, so the recording will be available likely somewhere on the Field Marketing site. Yeah, we'll have it available for people. Stacy says, "Can you walk us through an example to create a stream?" Okay. Let me go back here, then. Okay, so we're going to create a stream. I don't have a lot of different social media accounts on here, mostly just my LinkedIn, but I can show you how to do it. So, let's do *Add a stream*. I'm going to select my network. I only have one on here, okay? But you'll have more. So, basically, it's going to ask you what do you want to add. So basically, the problem right now is, for LinkedIn, I can only monitor my updates and my schedules and what's happening that way, but for other accounts, you can search a lot more stuff. So I wouldn't be the best example as far as how to add a stream. But frankly, it really is as easy as add a social network, like your Instagram or your Facebook or whatever it is, and then add stream. It is going to ask you add stream for what network or for what account and you're going to select Facebook or Instagram. And then

instead of just these two options, it's going to give you five or six options, like search hashtag, search person, search topics, and then it'll give you all kinds of things, and then you can select... You can even do advanced search to hone it down.

So, there's a lot of different search features. I'm not the best to be able to show you because with LinkedIn, you can't search too much. It's mostly just scheduled and updates and who's interacting and all that kind of stuff, which is still useful, but what you can do with the other platforms is much... like Twitter is wild. You can track anything on Twitter. So, I'll leave it there, I guess. But just try it out. Just go on and click *Add a stream* and see where it takes you, and you'll find out it's pretty awesome.

Lily, you had your hand up?

Lily:

Hi Shawna.

Shawna Ireland:

Hi.

Lily:

One question is, I know you just said that there's going to be the recording on the website. Would we get the link to the recording?

Shawna Ireland:

Yeah, I'm sure there's a way that we can make the link available, or at least where the link is housed. I'm just writing that down. But also, if you have Hootsuite, in the registration, there was a course called *Social Media and You* and the *Platform Training*. All the stuff about streams, to the nth degree, is in there, and you'll find it all inside Hootsuite under *Help and Resources*. There's video demos on all of this stuff. I'm blowing through it to try and get a sense of what you can do with it, but really, literally, there's so much on the Hootsuite platform under *Help and Resources* to show you exactly how to do whatever it is you want to do. If you have Hootsuite, just click in on Help and Resources and it will show you how to do everything.

Lily:

Okay. Yeah, excellent.

Shawna Ireland:

Yeah. It'll take you right to the courses. But if you want to do the courses, great. If you don't, that's okay because you can just search inside your Hootsuite, under the *Help and Resources* search tab, and you'll find all of this stuff there. Don't worry.

Lily:

Okay. I think I'm going to do the course first.

I have another question here. If I have more questions, I need more further help, would I be able to reach you guys for help?

Shawna Ireland:

Absolutely. In general, if you email this field marketing mailbox, I think it's just fieldmarketing@canadalife.com, somebody will respond within 24 hours. They know everything. I don't want to say that they know everything because that's a big statement, but it's pretty true.

Rachel:

Yeah, Lily, I think it would be best to take some of your specific questions offline. We can definitely always try to take a look at your account, see what's going on and help you further from here.

Lily:

Excellent, excellent. Thank you so much, you guys.

Shawna Ireland:

All right. Okay, so with that, we'll move forward and we'll go from platform training and we're going to switch gears from the how-tos to... when we think about online, offline, but especially online, we think about these influencers. But what are the traits of an influential person? When I think about Oprah Winfrey or Bill Gates or Kim Kardashian, or even influential people in my own life... There's a realtor that I know and she is phenomenal. People love her. She's so influential. She's at the top of her game and everyone is just attracted to working with her. She's like a magnet. So when you think about those kind of people in your life, what are the traits? If we're thinking about those people, what are the traits that they have that draw us in and make people think "Oh, I should work with this person," or "I need to be near this person?" Can anybody think of traits? Feel free to unmute, or you can type in the chat. What do we love about these people? What makes them influential? I'll let that marinate for a minute.

Amy says, "Honesty and transparency." Yeah. "Authenticity." Joe, yeah. Absolutely. Those are great.

I wonder, why does that make people influential? Just being an honest, transparent person who's genuine and authentic. Why do we love that so much? Those are good answers.

Amy:

If I can pipe in. It's Amy.

Shawna Ireland:

Yeah.

Amy:

This is something that we're working on in our little family financial firm, is we always are saying... my dad always is saying, "We want to service families like ours." We enjoy working with families like ours. And I think it's wonderful, and the sentiment is great. But I had to have the hard conversation with my dad and my stepmom and my brother and say, "What is our family? How do people know families like ours? How do they know we relate to them or that they relate to us?" It's going to take some work, but I think we have to put ourselves out there and say, "We're not immune to the things that you are going through." We've experienced loss, we've experienced a critical illness, maybe had someone in our family or close by win the lottery and it's affected dynamics in the family. We've worked with families, we understand the family dynamics in a family business. So just trying to put it out there of who we are and be relatable so people can say, "Yeah, I do want to do business with that person or that family or that firm."

Shawna Ireland:

Yeah. I love that, Amy. People meet you in person and maybe there's people who know you and your family quite well, but in the online space or external of people who know you personally, how do you show people who you are, that you're a family business, that you have these traits, these influential traits, this authenticity, this family focus? How do you really show that? That's awesome. Okay.

Well, as Amy already told us, in real life and online, the traits are the same, really. We seek out and gravitate to people who are asking thought-provoking questions, they're trying or suggesting new things, they have new ways of looking at the world, they challenge us a little bit. But these are people who solve problems, right? They connect us to people, like

the old "Oh, I know someone who can help with that." They're the people we call and we say, "Listen, I don't know if this is your wheelhouse, but I have this client..." Those are the people that we go to. They're the people that we really like, the people we want to be around, whether it's for five minutes or for lunch. They're the people we feel give us the most authentic version of themselves. They loosen their tie a bit, they have a family focus, they throw their head back when they laugh, they're storytellers and they let us into their world and their journey. They make us feel good, included and important. And at the end of the day, we just trust them for all those reasons that Amy and Joe laid out, honesty, transparency, authenticity. We just trust them. We know that behind all of this influence and maybe charisma is just a person who wants to help and to be of service. And because of all these different reasons, we are subconsciously primed to help people like that succeed because we're attracted to that and we want to be involved in that. Does that make sense?

I think we'll go next into from what is being influential to "Okay, that's great. There's influential people. We love the idea of influence and people being attracted to us and wanting to work with us. That's great, but how do I create this dream world online?" And we thought it best to explain some of the details and some of the learnings from that Social Media and You course by using the example of two different advisors, Jasmine and Bianca. So, as we move forward, we're going to use these two advisors to illustrate some key areas that you can begin focusing on right away to take the learning to a little bit more hands-on examples that we thought would be helpful.

If we look at Jasmine, Jasmine has just made a career change to being an advisor. She's very new. And she was a chef before. So she'll be new to LinkedIn. She has some existing accounts on social media, but mostly as a chef or, on Instagram, of her family. She needs to reintroduce herself and her career change online and in person. She loves family and cooking and is passionate about literacy projects for children. She volunteers a lot in her kids' school. It's very important for her.

Secondly, Bianca's four years ahead of Jasmine. So Bianca's at her fourth year. She's going to be incorporating. And she has existing accounts. She's known as a foundation, Canada Life, advisor, by her followers and network. She's built a good business. She needs to introduce her new brand and her independence now going forward. She personally loves running and Pilates and is passionate about empowering women in the finance space. So, there's a little bit about the two of them.

After that, let's move into the next portion of the learning and we'll take Jasmine and Bianca with us. So, from the training from Hootsuite, *Social Media and You*, we know that each platform very much has a purpose. Instagram, LinkedIn, and Twitter are three that I highlighted. But think of it like a bento box, like you are a bento box. Like you're all part of the same lunch, but different sections or platforms have different flavors. So it offers the right sections to people that might want to consume that and it's most enjoyable for them.

People go to Instagram to see super-authentic sides of people, travel photos, hobbies, something very informal and personal. Everybody has that piece to them. So that's one section of who you are as a bento box. LinkedIn is the next portion of the box and that's going to be that professional, thought-leadership, changes in the industry space. It's very branding-heavy and it's a good place to crowdsource solutions or pose questions to crowdsource solutions. It's also all about your own business, your professional activities on the day-to-day as well as large accomplishments, and the journey that you're going through in your business.

Lastly is Twitter. And Twitter is certainly on fire. But generally, it's a very niche space where you can showcase a lot of personality and engagement. It's a place that's a little bit more fun than LinkedIn, where you can share things like memes and GIFs. It's very focused on community events. So if you volunteer and you're interested in those kind of things, Twitter would be a great place for that. Just a great place for you to show kind of your whole self.

So, let's think about what we know about these advisors that fit each platform. So unmute, raise your hand, type in chat, whatever you want to do. What do we know about Jasmine that she should be posting or thinking about showcasing on LinkedIn? Jasmine is brand-new career change to advisor from chef. So what do we know there about Jasmine that she should be posting on LinkedIn? In the chat or be brave. You can unmute yourself in one of these conversations. You can go skydiving later. The sky's the limit for you.

"Career change," yeah. Amy says, "Career change." Yeah, she is making a career change. She needs to get on LinkedIn. Ah, Ken, her story, why she decided to become an advisor... Oh, go ahead.

Rachel:

I'll throw one in. I think Jasmine being passionate about literacy projects for children really stood out to me. So maybe just showing, again, why she loves us so much, how she gets involved. Maybe she goes to the local library to teach them about literacy. So, just pointing out the things that she's really interested in and helping that build her new brand on social.

Shawna Ireland:

Absolutely. Absolutely. So, literacy project, when you're talking about volunteering and project building, that's really a huge thing for Instagram and Twitter. But LinkedIn is changing a little bit to be a little bit more approachable. So even on LinkedIn, you can be showing photos of your teams getting together. Maybe you are going out and buying a bunch of books because you have a lot of donations or you're meeting with the chamber, something like that. Like, you can gear all of it to any post. But it's just to get the juices flowing. Everybody always says, "Well, I don't have anything to post," and I would say, "Let me follow you around for two days and I'll show you 10 posts," because all of these, what you're doing matters.

Amy says, "Career change." Absolutely. You have this brand new career, you've basically started another business. Well, what does it look like? What do you do? Who do you want to work with? You have so much to say, especially on somewhere like LinkedIn, that you could just be overrun with posts. And Ken says, "What's her story? Why did she decide to become an advisor?" That could be any platform, really. Like, if you look at Jasmine, she's a new advisor, but she's also all about literacy projects for children. You know what I love? Financial literacy for children. So you could really turn that into a part of her brand story, about realizing that focusing on literacy is important, but financial literacy is also important. So she has this dual-literacy passion and running that out in a very personal way, being authentic. And also, like I said, LinkedIn and Twitter are becoming places of more engagement where you can tell those stories of who you are, why you're here, what you're doing. And then focus on brand story and being authentic. That was another great comment. Absolutely. Focus on your brand story.

And then in LinkedIn, Canada Life provides all of these articles and content all the time about subjects like term insurance or subjects like tax and estate planning. So if you're brand new, a really smart thing to do would be to be sharing this content about tax and estate planning and events that you're attending, all those kind of things, and those posts from Amplify, because it demonstrates clout. If you share something about tax and estate planning and you offer a thoughtful comment, you could be in the business eight minutes or eight years, still looks good. So, that's why I say leaning on this CL content and Amplify is super important because the content is great and it's polished. And add your own thought, add your own comments to it, how you work, what you do, but lean on that because it's great content. And then they pay a lot to have it made. So why not use the phenomenal content, especially if you're under three or under five. Anybody can use it, but especially under three and under five, you should be leaning on the brand. That's just what it is.

What about Bianca? When we look at Bianca, what do we know about her and where it fits and what she's doing right now? Where could we fit in some posts for Bianca? She's rebranding at year four, she's incorporating. I didn't come up with a name for her. We'll call her 123 Financial, I don't know. But what does she need to be? Where does she need to be?

Yeah, yep. "Testimonials of her client's success." Absolutely. "Her female engagement niche," Joe says. That's awesome. Do you want to extrapolate on that, Joe, for me a little bit? What does that mean? Unmute yourself.

Joe:

Can you hear me?

Shawna Ireland:

Yeah.

Joe:

Okay. So, basically how she engages female clients, why she's passionate about that, and what she does with them once they become onboarded as a client, and how it makes them and their families successful.

Shawna Ireland:

Absolutely. I love that. Yeah, if you're going to be passionate about something, say it. Share it. If you have stories, if you have an engagement niche that is different and it's so good for you, Joe, because an engagement niche is different than a market, you can have an engagement niche online, very much builds up this community of champions around you. And they may not be your actual ideal target market or even natural market, but you can, based on your interests and your passion, build up this engagement niche that can get you a lot of traction online. And it's a great way to show people why you're doing this and what you're doing this for, and share your thoughts and opinions, and engage with other people who feel how you feel. So, it's a great way to show authenticity, and it's a great way to show personality, that there's a lot more to you. Like unpeeling an onion. "There's an onion to me. I'm not just an advisor who is like every other advisor. I'm different."

And the biggest takeaway is these are all things help to differentiate yourself. That's really what it comes down to, is just engaging, finding people like you or people who are champions for you, and differentiating yourself. But I hope this slide, anyway, gave you a good example. Now write out your own thing. Are you new? Are you transitioning over... You're in your third or fourth year and you're transitioning? Have you been in the business 10 years, 20 years? Maybe you've been in the business four minutes, I don't know. Write out your own thing, like, five lines, and then you'll find ways to stuff them into the different areas.

We'll move forward. And I'm going to ask, think of yesterday's activities. So everything that you did yesterday and maybe on the weekend, we'll say, think of that, and what's one thing you could have made a post about?

Okay, you can put it in the chat if you want to, or you can unmute if you feel you have a great idea.

Yes, "Engaging in youth sports if your children are a part of that." Absolutely. Does anybody else see the connection here between sports, running, marathon, health, volunteering, all these things? Does anybody else make the connection between these, and them being analogies for long-term financial success and financial planning, right? Starting early, staying the course, getting a coach, all of these things, there's so many ways that... so many personal interests and what people are doing with their families and their communities, and even just taking time out to read a book, all these things lend themselves so beautifully to the tenets of the successful financial plan and life that you can weave those beautifully on Instagram, and LinkedIn, as well.

"Health and family is a concern for everyone, thus it's relatable." Absolutely. "Exercising, mental-health benefits," absolutely. All of these things. "Engaging in professional development." How often is everybody doing CE credit stuff, especially when you're new and you're doing, like, a hundred courses a day and you want to barf? But those are all opportunities to create a post. Just because I did a CE course on some kind of term conversion change or something doesn't mean that I have to post about it now. Because I did five courses today, I'm not going to make five posts today, but I could make five posts and release them over the coming months so that I can maximize all the CE that I'm doing. So every time I do a CE, whether it's at my computer or out in the community or whatever it is, I can maximize that. Everything you do can be a post. Where it goes, of course, is up to the topic of where it needs to go in the bento box. But yeah, all of those things.

The whole point is, just about anything could have been a post. And I just want you to start thinking that way, that most things could be a post. I made a post few months ago, I was reading a book, and it was just a fiction novel, and the post was just basically about doing stupid stuff for yourself. Because sometimes I don't get a lot of time to do things for myself, so it was just nice to sit down and spend this half an hour reading a novel that was not educational in any fashion. So, even that's the post, taking time for yourself, making sure you're doing the right things.

Okay, so we had awesome ideas for posting. We all had a post that we could do, that we could have done before. So now we're like, "Okay, can we make this even easier?" And the answer is yes, by creating content in three groups. This is what's called the rule of thirds. Basically, when we're making content, you can think about it in these three ways.

- **Business**, this is the content post about your own business, your own personal practice, your journey, your stories, your education, your connections and engagement, all those kind of things. Think about it's all about you and your business. What am I doing, how am I different, all those things about business.
- Secondly is **thought leadership**. It's not really about me. I'm not really posting about what I did today or my own CE course or something. It's like, I'm sharing a CL content or I'm sharing a third-party article or something, and I'm posing a question to the group about what's happening in the industry. So you can always be sharing those articles or what's happening in the mortgage market or what's happening with inflation. And then we're talking about sharing our opinions of and asking industry-relevant questions and hoping to get some engagement on that. So, that's where we're differentiating ourselves as people who are thinking about things differently. "Could

we do this differently? What's happening in this market? What are your thoughts about this? There's this problem, how would we solve it?" So you're kind of differentiating yourself as somebody who's asking the larger questions, thinking of the bigger picture. So it's not really about Jim at a ABC Financial.

- And the last one's **personal**. So those are those niche interests, family life, community, volunteering. That's you, just you as a person. That's you. Those are those posts that we always want to make sure are... I would say, and I'll say at the end too, but I always say, "Would I share it with my mom?" Yeah, we need to be careful with the personal posts, but absolutely share what's authentically you.

But putting them into three groups helps you to see and think of posts easily so that you are always... It's easier to come up with posts when you look at the category, right? And you're like, "Oh yeah. Oh no, this is business. I'm out at work today. It's one of my two days a week that I go to the office." So, maybe my post is literally just in the office being like, "It's great to break up the monotony and get into the office and feel more with people." Maybe that's your post, but it's a nice photo of you in your professional office. So, when you think in thirds, it makes it easier to do the post. And then also the rule of thirds suggests that you should be posting one third of each, and not just business, not just thought leadership, and not just personal, that you should be trying to even it out. Obviously, some platforms are going to be more heavy than others. Instagram's going to be a place where you're more personal, more family, and LinkedIn's going to be a place where you're more business and more thought leadership, but having a general mixture is healthy online. Does anybody have questions about the rule of thirds?

Okay. So, if we look at the rule of thirds and we look at business, your own personal practice, your journey, your client stories, I will ask, what's one post that you could have made on LinkedIn today in the business category? You can type or you can unmute.

Rachel, "Being in the office around lots of coworkers." I feel like I need to come to the office more. I feel like I'm in Siberia sometimes. I don't see anybody. That's okay.

I guess maybe I would challenge the group to, in the next 24 hours, make a post on wherever you're most comfortable, really, but I would say LinkedIn...

Joseph, "Showcase a recent victory with a client, i.e. what you did and why. Don't mention their name, obviously." Yeah, that's a great idea. Does anybody share client stories or testimonials or... "I met this client, this is what happened and this is how we were able to help," those are phenomenal posts. Anywhere you put them, those are phenomenal. People love them, and it's a great way to showcase what you do. So, if people are unsure, it's a great way to showcase that.

So, I would say in the next 24 hours, my challenge to you is to make a post in the business category on any of the platforms, but I think maybe the easiest would probably be LinkedIn or Twitter. But say something about where you are in your business, what you're doing. Maybe you're taking courses, maybe you took a course today. What are you doing? What's coming next in your business? What do you want to tell people? So, that would be my takeaway for you for today, is go ahead and make a post. If you're really comfortable with making posts, then make three, use the same kind of information and make three different posts. Personal, thought leadership, and business. See if you can take one or two sets of information or experiences and make it into different posts. And just have fun with it.

I'll wrap up because we're at time, and I don't want to lose too many people. If you wouldn't mind doing these surveys at the top of the chat, but I will also put it here, please do the survey. It helps us to know if we're doing a good job, if there's things that we could do differently to bring you the sessions that you want and need. And it's really important for us to get the feedback. So if you would complete the surveys in the chat there, so go ahead. If you want to complete it while we're finishing up, then please do. I would appreciate it very much.

So, at the end of the day, we just want to put it all together. We want to describe yourself and your personality, make sure that you have goals for your platform. For LinkedIn, maybe you want to... your main thing is to get leads, but maybe for Instagram, you just want to engage with people who are like you, who love your travel photos or love your family photos. And you may end up finding a niche market there, or a niche-engagement market. But have a goal. If you work with a lot of business owners or professionals and you want to get the leads, then focus your time on LinkedIn and make goals for that, how many leads you want to get.

Again, think in thirds. It will make it so much easier to create posts and to review what you're doing this week coming and make posts out of it, because you can automatically put almost anything that you're doing into one of the categories. So, what I would say is completely think in thirds and plan it out. Even if you're just going through your week and you're looking at your activities, write down, is it personal, business, or thought leadership? Is it an event? Is there a link with it? Like, what's the post about? Just write them out, based on what you're doing this next week. And you can plan out posts.

And then eventually, you can use the Bulk poster, but you don't have to. But yeah, just make sure you're trying to plan ahead so that you can do the post more easily.

But again, and I had forgot to go through it, but the app looks just like the dashboard. It's so simple. So if you're on the run, at an event or at work meeting with colleagues, snap a photo with everybody. And then do it in the app, it's so easy. And you can catch all of those business events. Maybe you're meeting with people to do some branding or make a new logo, that's a post. So, just think about that kind of stuff.

We learned from Sean Humphreys, his best advice was, "Be positive, listen and engage. Don't be a megaphone." And to everybody who might be a little bit new, just learn as you go and be yourself. Nobody is tapping their watch saying, "Hey, go faster. Get better at this." Most of this is behind-the-scenes effort, and that's what makes it so beautiful. Nobody's waiting for you to be phenomenal at it. People just genuinely want to know about you, and they want to know about your business, and they want to engage with you, they want to see you, they want to hear your story, they want to know you and experience you. And if you keep that at the heart of what you're doing, you'll be fine. And the rule of thirds, always the rule of thirds.

And then I'll end on a Dr. Seuss' quote. If you have any questions, please ask. I know we're a bit over time and I apologize about that. I try my best to stay on time. But if you have any questions, feel free to unmute or ask in the chat. Otherwise, I will release you into the stratosphere, if you have completed the survey.

Thank you.