# Transcript: Field Marketing – Social selling session #2

**Shawna:**

So I want to welcome everyone to today's session. It's the second session of the social selling series. Today's session, unlike the first one, is really going to focus on expanding the learning from the Hootsuite course, social selling training. So unlike the first course, this course really focuses a lot on some platform optimization and things of that nature, but it focuses a lot on targeted lead generation, tracking and planning to prospect from that. I hope you completed the learning on the Hootsuite platform because it's phenomenal. And if you didn't, that's okay. You'll still be able to follow along and get some value. But if this is something that does interest you, I would definitely recommend going back and doing the training. It's totally free. And you'll have access to your Hootsuite platform.

So again, if this is of interest to you, if you do want to learn about lead generation and social media, definitely go back and take the course or even portions of it. It's all portioned out into small little modules. It's really great, and you can do it in snippets of the things that interest you most. So we'll go from there.

Today's session is not really a rigid space. It's really a space for connection for us to learn and have some fun together. So as much as I love sharing or staring at my own face, if anybody feels that it would be useful, you can turn on your camera. I'll be asking some questions where we can have some discussions. I'd love to see some cameras on if anybody's open to it. Thank you. If you want to turn your camera on and really just lean into the learning, that would be great. So with that, we'll go forward. My name's Shawna. I'm a training manager with the advisor development team. We've worked in tandem with the field marketing team as of late in the past six months to really bring you more value in helping you prospect online. Field marketing brings all the tools and expertise, the platforms, everything that you need. So on the training management side, we're really interested in helping you get the how-tos and the learning to best optimize all your platforms and all the tools that Canada Life offers. So that's really where we came together on this project.

As far as today goes, we're really going to be looking further at optimization. I'm going to introduce an often-overlooked platform, but it's really one that's key to being searchable and active online. After that, we're really going to look a little bit more deeply about our objectives on each platform online. Why are we there? Once we know why we're there, we're going to look a little bit more at researching online, listening online, and then how do we plan to engage with our prospects in a way that's meaningful and gives results that we want. After that, we're going to look a little bit more at the actual actions of prospecting and engagement. And what does that system or flow look like in your practice?

It's an open floor for questions. So I've got the chat open. So you're always welcome to put a question in the chat. But at the end, we'll have open floor as well. I will bring your attention to the top of the chat. You'll see a green box, that's the Survey Monkey. So if you would fill out the survey at the end, it means a lot to us because again, your opinion's the only one that matters as it pertains to this and a lot of things. So we need it. We want to know if we could do better or if you really enjoyed this session. It's very meaningful in helping us move forward and deliver things that matter to you in a way that you enjoy, okay?

So that's my ask of you. Okay, no more asks for today. Just kidding. So when we're looking at our platforms, really we'll start with, we're going to do a little bit about platform optimization again. So this is a little bit of review from the first section. But to ensure that we're appearing robust online, we'll look at LinkedIn first. And LinkedIn, as we talked about before, is really our trade show booth where people can come and how they view us is as if we're opening up our business doors or our trade show booth to them. So it's very much how people view us, but again, also the position and the business from which we interact online with our centers of influence and prospects on LinkedIn. So the first thing is your headline. Your headline really should be brief but impactful. Some people use quotes, some people use something about them that's powerful, a phrase that they'll often say or a mantra that they believe in.

As a business owner, you have a little bit more leeway to really shape your LinkedIn the way that you want it. And so when we're talking about the LinkedIn, it should be something that you would want somebody to read and think, "Oh yeah, I think that's great." So you have a little bit more leeway there with creativity. Linking your location, I've seen a lot of people link no location. So linking your location to London or wherever you are is very important to connect with centers of influence and local business owners and local prospects. In our industry, lots of us work virtually. So I'm in London, Ontario. I can work with someone in Timmins; I can work with someone in Sudbury. The sky's the limit as far as virtual practice. But what we need to be cognizant about is 80% of people want to meet with somebody in person when they're looking at financial planning. And that percentage goes as low as 70%, and as high as 99% depending on types of planning as well as net worth.

So we always want to make sure that we're looking at people who are local and as well in our centers of influence. Remember that while we work virtually, many businesses do not. While they can send some documents virtually, they don't offer virtual meetings. So when you're connecting with a center of influence, maybe it's a lawyer, an accountant, a realtor, any of these people, you need to be aware that for them to refer you business, a lot of people like to meet in person. So for them to connect with you meaningfully, they often will need to connect with people who are local. So you need to be local to your centers of influence for the most part. And we love the virtual world, but nothing replaces being in person. So being cognizant of that when you're setting your locations is very important on LinkedIn.

As a reminder, your education and expertise, often I see that they're not really filled out. We're missing licensing that I know you have. We're missing licensing or we're missing descriptions of education. So, really make sure that those are robust because you wouldn't want to tell the prospects about all the different licenses you have and all the extra education you've done and all of the specialized planning acronyms that you have after your name. It wouldn't be appropriate to shoot your education onto somebody like a fire hose. But it's totally appropriate to have it laid out on LinkedIn because this is your business. They've opened the door; they've entered. So now is the time for them to take their own time and scroll and really see that you've got it going on in whatever area of financial advising and planning, that you've got all the certifications they might need.

And because they're coming to the platform, they're going to be more willing to spend a minute and just, oh yeah, wow. You've really got your QAFP; you've got your CFP; you've got your CLU; all the things, all the acronyms that sound terrible coming out of your mouth when you're telling somebody about them all. But it's a really appropriate way to get that information across. So I just wanted to mention that it's the best way to do it non-boastfully. And finally, I've had a lot of questions recently about the "about" section of LinkedIn. Your "about" section is really, if we're looking at it, it's really your PSFY in a shortened version. But it's really your identity statement, who you are, your brief job title. But who you are, why you do what you do, who you do it for, and the great results.

So it's really the best place for you to have a good identity statement. The old school way to say it would be the elevator pitch. But really what we're looking for is an identity statement. It's robust; it's passionate; it talks about you; it talks about what you love to do. So it's really the best place to put your best identity statement. And so if you're three years and under, you need to be hitting that mark with your BDA and developing something absolutely phenomenal. If you're over, you can find lots of resources for that in the business growth toolkit on the Learning Centre. All kinds of those things, but it's a really good place to do it well.

So if we switch to Twitter, Twitter mixes really your online interests and your personality with your business. It's a much looser space. This is a great place for community posting and niche interest. You want to ensure that you have on your profile six tweets to start with. Because when somebody lands there, it looks like... It's like when somebody goes to Instagram and they click on your profile and you have two posts, whoops. And that happens, right? But on Twitter, it only showcases some on the sidebar. So, if you have six, it'll fill that out. And it's just nice to look at.

When it comes to location and contact settings, unlike LinkedIn, should be set for everyone. Excuse me. Because Twitter is more niche and interest space, and it's really for trending news, trending industry topics, big leaders, big influencers, that kind of thing. It's not really conducive to a lot of local centres of influence and things like that. It's really a broader online situation. So you can go ahead and set it to anybody.

Next is the “likes” tab. So, the “likes” tab on Twitter is like a connector. When we talk about being an influencer and being a connector and not a megaphone, the “likes” tab is a great way for people to come to your profile and see what do you like, what are you engaged with, who's engaged with you, recent comments, all those kind of things. It helps them to decide, "Well, I like this person. I'm engaging with this person. Who have they engaged with? Do I want to engage?" So, in that way, it makes you a connector. And it brings the visitor to a place where they can see you, and not only your posts, but everyone who's engaged with you and who you're engaged with. It makes you this sort of hub and this connector. And a lot of people actually check that to make sure that they not only like what you post, but what you engage with and what you're doing on other posts.

So then lastly would be the Bio. So same thing with LinkedIn, it's really going to be your identity statement and your niche interests, humor, community interests, all of those kind of things.Twitter is that looser online space where you can share some gifts, some memes, things like that. But again, you really want to be clear about your identity statement and your niche interests and things like that. Does anybody have any questions thus far? Feel free to throw up a hand or unmute any time or type in the chat. I'm monitoring that as well. So does anybody have any questions so far, or comments?

Okay, good. So from there, while often overlooked, Google My Business can be extremely useful for those looking for local business services. A monitored Google My Business account can generate a lot of traffic. When we say traffic, we mean people going to your website, people going to your social media accounts. But by traffic, I also mean people clicking and trying to get ahold of you and contact you. So, it's extremely overlooked. But it can be used to boost your SEO and help you become more searchable for anyone in your area looking for your services. As your social media presence grows and maybe you have a Digital Agent site, awesome. With more keywords and location tags like we talked about, Google's AI will push you into more filters on Google, bringing your business up more and more often in people's searches for less and less relevant searches.

So maybe you would come up if somebody searched Phil Smith financial advisor, London, Ontario. That's pretty specific. I would hope you would come up in the first page of your own name and your own profession. But eventually, what happens, and Google My Business helps with this, is eventually it will just be Bill Smith or Smith and some form of financial advisor, and then just maybe financial advisor, London, Ontario, and then maybe just financial advisor Ontario. So that's casting such a wide net. And that's really what pushes lead generation in the overall online space is somebody casting this wide net on Google and suddenly you come up for no reason. We have an advisor who comes up when you Google Canada Life or the word Canada, Ontario. He comes up. But it's just because he's done such a good job with SEO that he pops up.

So worth noting is everybody understands this graphic, right? You have the map and then you have a banner picture, business name, all these kind of things, general info. But worth noting is you can actually upload images, information, and even create posts on this site for visitors to see. So question for the group, you can type in the chat or feel free again to unmute yourself. Use your video. This can be interactive. What might be the best types of post information to have on Google My Business? If I'm looking for a financial advisor say in London, Ontario, and I come upon your Google My Business site and I can see where you are, what else might drive me to contact you more immediately?
I've got hours of operation, contact. Awesome, absolutely. I want to know when your business is open and how I can get in contact with you. Because unlike websites, part of the beauty of Google My Business is, on a website, oftentimes people will click around and then they leave and they might write down your number or take a photo of it or something. But oftentimes on Google, they'll just call. So they don't mess around with my about section, pictures of me, my services, scrolling around trying to find pricing. With Google My Business pages, statistically, they found that with these pages where people land here, if they're happy enough, they will just call. They will just call you. Unlike a website, where most people won't.

Joe says, "Pictures of your office or you in your office." Yes. Yes, you can make posts. Pictures of you in your office, pictures of your office, pictures of your team. Other ones include testimonials. If you have testimonials, make a post and put at least three testimonials. You can also send links to this. We've all heard of this, the Google ratings. Your Google ratings will come up here. So if you have great clients, send them the Google ratings links so you have good testimonials. Community work is another one. Thank you. Community work. If you are doing something in the community or your team is or your business is, absolutely post that it. It's a really big snapshot of what my business does. And community events are very, important. Oh, thank you, Rachel. Amy asked, "How do we get the page?" And it's quite simple.

And Rachel put the link in the chat there. So you'll see the little Google business thing. You can just click on it, and it will pick up more information for you on the internet. So I just wanted to bring it up because it's super awesome. If you're running seminars, whether it's a webinar or in-person. Pictures, you can make an event flyer and make that a post. But most importantly, you're like, "Well, I don't want to make all these extra posts and stuff." It's integrated with Hootsuite Streams. So from Hootsuite, you can use Hootsuite Streams to monitor and respond to comments and questions. And you can make posts with Hootsuite for it. So it really just becomes another integrated extension. So if you have Hootsuite, hooray for you.

**Scott:**

Shawna, it's Scott. I had a question for you I legitimately don't know the answer to. With these business pages, can you include links to a meeting, booking service like Calendly or Microsoft Booking or something like that?

**Shawna:**

Absolutely, you can. So you can include links to your website, obviously. And you can also include other links to booking and to specific... I think you could even include links to specific services or portions of your website like Booking or RRSPs. You could change that seasonally if you wanted to. So yeah, Daven said that, retirement calculators. Absolutely.

Calculators, all kinds of stuff. And like we said, we love calculators because they drive traffic. So wherever you could put that, would be phenomenal. But yeah, just try it out and see how it goes for you and make a few posts of testimonials and stuff. It's really overlooked, but it really pushes SEO and it's so streamlined that people's attention span is so short that Google My Business is one of the best ways to do this because they can get all that information in 30 seconds without having to click around on a webpage.

Google reviews to have more than five. Absolutely. Get as many Google reviews as you can. So with that, I'll move forward and we'll kind of move away from platform optimization because it's more of a review. So we want to get thinking. We're on Google My Business. But mainly we're talking about Twitter, LinkedIn, maybe Instagram. So let's think. Type in chat, or unmute and speak. There's not that many of us. It's only like 28 people. When we think about our presence online on different platforms, say LinkedIn, what are our goals? Why are we on LinkedIn and Facebook, Twitter and Instagram beyond enjoyment? What are your goals? That's what we'll start with. What are some of your goals online? To drive traffic to the website and get them to leave their email address. Smart.

Yeah. Honestly, we want to drive traffic. We absolutely do. Whether it's from LinkedIn, from Facebook, Twitter, Instagram, we want to drive traffic to the website and we want people to meet with us. But when we're talking about, we want to drive traffic, we want to get leads, the main goal should be to be a source of knowledge that drives people to the site and thus book with you.

Help build trust with prospects. Absolutely. We want to build trust fast and early. So, if we want to do all these things, we want to gain a following maybe; we want to increase awareness of our business or business changes; we want to get leads; we want to create meaningful relationships. We want client retention. We want to enjoy ourselves. It should be somewhat enjoyable. Beyond existing, all of these things are amazing, but as they pertain to our business, ultimately when it comes to moving our business forward, they aren't necessarily really useful because you cannot create an action plan around that.

As the first part of maximizing our efforts online and being efficient and from a targeting perspective, we really need to know what do we want to achieve and what does the platform offer? Then we can remove all this wasted time. We can plan more efficiently, and we can be talking to prospects more quickly in a targeted way that's meaningful. So remember in this section and in this series, we're not really talking about posting a lot in this second session. We're really talking about prospecting and what our big goals are on these platforms. So how do we decide the big goals beyond having fun, beyond lead generation and driving traffic? To understand this, we're going to look back at our advisor friends from the first session, Jasmine and Bianca.

So, from the learning in the module on Hootsuite, the objective is the goal of your presence on each account. It varies depending on your audience and your market and the strengths of each platform that you're on. So, the objective more largely is not just to get leads, it's a statement in the middle that brings together these four other components for a larger and more elaborate goal. So, for example, does anybody remember Jasmine from the first session? Who Jasmine was? That's okay. So Jasmine was a new advisor. She had just joined as a Foundations advisor. And she was a chef prior. So, she was very privy to the food industry. So, her objective with LinkedIn initially is really to launch her business. But if we look closer, in these four different areas, she has some different things going. If you look at expertise, Jasmine's expertise is the food industry and now financial planning.

When we look at her personality, Jasmine is warm and interpersonal. She's a mom. She was a business owner for a long time. And that's her personality. Her purpose, when we look at her purpose in business, she wants to create a practice that understands and caters to food industry professionals. That's really what she's out here to do. And then interests are literacy, volunteering, a lot of things around child literacy and things like that. So, we take these four things and we put them together for a larger objective.

Her objective is to utilize her personality, which is her warm interpersonal nature, to create connections with the food industry, which is where the expertise comes in, to create connections with the food industry professionals to create a practice focused on moving owners and their families forward toward financial success. So, on LinkedIn, she's not just looking for connections or leads. She's looking to post and engage in a way that is warm and impersonal and to showcase her food industry and financial planning expertise for the purpose that is to cater her business to food industry professionals. So that will drive the majority of her activities and her connections. So, if there are connections and activities online that are outside of that objective, she is not as likely to engage heavily in them unless they're a center of influence that's around that world.

On Instagram, however, Jasmine's really all about family and cooking. She has kids and she was a chef, so she loves that. That's always been what her Instagram is about. Her objective there more deeply is to create a wealth of connections centered around women and families in her natural market. She uses expertise about financial planning and cooking to highlight and bring awareness to her market of financial planning through metaphorical or motivating posts.

We talked about her making posts, whipping up a recipe and talking about putting in the right ingredients like putting in the right ingredients to a financial plan. That kind of thing. But it's a much looser space for her, where she's really interested in creating, again, warm connections and looking for people who are interested in what she's interested in. So, with that, I'm going to ask the group, let's look at Bianca. As a refresher, as opposed to Jasmine, Bianca is in year four. She's incorporating. She's launching her new brand, and her interests and expertise are really in empowering women in the finance space. So, if you can, picture Bianca as you see her, as if she's a connection of yours on LinkedIn. And I want you to unmute and tell me what do you see on LinkedIn that tells you these things about Bianca? And then if you were Bianca, who would you be connecting with? What would you do?

**Speaker 4:**

Hey, Shawna, can you hear me okay?

**Shawna:**

Yeah, yeah.

**Speaker 4:**

Okay. I think, yeah, she's relatively new into the business, so she should try to connect with other emerging advisors just to learn and grow from them. As well as any established ones, but then in terms of prospecting, just trying to find people, using those keywords or finding groups of people in her area that match her target audience. So yes, it's like, you're looking for people that are fresh out of school, what are the universities in your city that you could find who's tagged as an alumni at that school, and how can you connect with them and see where they're at and prospect them?

**Shawna:**

Absolutely.

**Scott:**

Can you hear me?

**Shawna:**

Yeah, go ahead.

**Scott:**

Oh, sorry. Rachel and I are using the same computer, so hopefully you can hear me. I think too, she'd want to follow obviously a lot of restaurants, chefs, people in the food industry showing some interest in that. I know she's highlighted that she's interested in childhood literacy and volunteering. So sharing some of those experiences to help show up her warm personality, I think would be important as well.

**Shawna:**

Absolutely. Yeah. So Jasmine's going to do all of these things to show her warmth, her involvement in childhood literacy, volunteering. Absolutely. And she's going to, on LinkedIn, be really focused on being that go-to person and finding people in the food industry. When we look at Bianca, she's passionate about working with women. And she's not shy about it. She's passionate about working with women. And so on LinkedIn or those types of platforms, she's really looking to connect with women in leadership. So, she's looking to connect with women who are in professional roles, women who own businesses, women who might be on LinkedIn, who have roles about empowering women, all of those things. So, she's really going to be using her expertise around that to further her purpose, which is to empower women in the finance space and women and families and all that kind of thing. So going her profile, that's definitely something that you would see for her.

The first takeaway of the day is really this. Whether for LinkedIn or another platform you want to build, I want you to write down and answer the questions, who are you there? Write these four areas down:

- What's your purpose in your business really?
- What's your personality?
- What's your expertise?
- And what are your interests?

And then I want you to write out your objectives. Write out your objective. Who are you on these spaces? How would others see your purpose? How would others see your personality? How would others see your expertise or your interest? And then write it down in an objective like you're telling a story. Like Jasmine's story was, she's using her personality, her expertise, and her interests to basically fulfill her purpose. And so that will guide all of your activities and who you're looking for on LinkedIn quite easily. And I use LinkedIn as an example because it's really the main platform. So, write it down like you're telling a story because you very much are. It will help you to target all of your activities around this one objective beyond getting leads and growing a following.

With that said, we will have discovered what is our objective online on these different platforms. But in our last session, we talked a lot about listening and that people want to be heard and that we don't want to be a megaphone. We very much want to be a connector. We very much want to be someone that's useful to prospects and clients and we're there when they need us. But it's said that listening is more important than speaking, which is true. That's easy enough in person. We know that. But how can we listen online in the online space? Feel free to type in the chat or unmute, but how do we listen in the online space? If we're together, and we're just talking, and I'm telling you about my life, obviously you're listening. But how are we listening in the online space?

Trending hashtags. Devin says trending hashtags. Absolutely. That's one way we can listen on a macro scale to what's happening. What's the big news in industry? What's happening in markets? What's happening with governments? All of that kind of stuff. And so, when we're looking at macro listening, we're really looking at Hootsuite Streams, which is what I introduced in the first session. You can add in all the things in the world that you want to track. And it will be your fastest way to listen on a macro scale. So when we're talking about Jasmine and her being in the food industry prior, and part of her listening on this macro scale is really listening to industry news, food industry news. She's going to be really interested in that so that she is first to the table to connect or comment or share a post about something that's happening in the food industry that might be affecting her prospects.

To be first to the table with that kind of stuff is amazing. That's a form of listening. Absolutely. Taking some time to scroll your followers and interact with their posts. Absolutely. We talk a lot about monitoring via streams and things like that, but I have an advisor friend of mine who's older. He sells more small policies for kids than I can even count. And it's because he takes the time to scroll through his Facebook and he actually searches in the search bar, life events, posts. And so all these life events come up every month for his group.

So that's his form of listening, that people have had grandbabies or people have got married and whatever. So that's his form of listening. And then listening also on LinkedIn and interacting with people's post's so important. If you're on LinkedIn and you're just having a scroll, we want to monitor, but of course we scroll and interacting with people's posts, you can learn a lot. You can learn what people are doing, their events. Even on LinkedIn, people will post about things that they're struggling with. You can learn a lot from people. Stacey, monitoring your feed or setting up a stream. Absolutely, absolutely. All of those things.

Yeah. Rachel mentioned curating your feed to make sure that you're monitoring the right people and not absolutely everybody. And that's super important. So as I said before, listening is more important than speaking. And the same is true online. And we just came up with a bunch of ways that we're listening. But the same is true online. Not listening online as with online or offline. So not listening online and bombing ahead with our own plan for prospecting can have huge problems. And I'll give you probably the best example of this, and it is LinkedIn messages, LinkedIn prospecting messages. I get them all the time. And I'm sure everyone does. But if anybody's comfortable, type in the chat or unmute, what are some of the biggest turnoffs or cringe moments you've had from LinkedIn messages where you know they were just thrown out into the stratosphere?

What can turn you off about them? Yeah. Thanks for following me. Can I sell you this software? It's amazing. People immediately jump into selling you something. Absolutely. It's so fast. People promising leads to advisors. So there's a lot of different things that go wrong with LinkedIn messaging. And it's not that LinkedIn messaging isn't a good way to prospect. It actually is. But we're going to go over some of what happens and how to fix it. Because some of the most common issues are errors in spelling and grammar. It's clearly copy-and-pasted. Sometimes they forgot to change the name or whatever it is. But it's clearly copy-and-pasted. It's irrelevant because it's not even something you would be interested in at all. And somebody who listens to you or spent any time would know that. Or it clearly doesn't apply to you. I get a lot of messages about my business and stuff like that, but on LinkedIn, I'm a training manager at Canada Life, so whatever they're doing clearly does not apply to me. And they're huge turnoffs. But almost all of them occur because people didn't listen to you or who you are. And by listen, we mean monitor and look and gently engage. It's the fastest way to blow it online with a prospect. Or on the phone. Same principles apply. So how can we get it right? We know things like LinkedIn messaging are not bad. Facebook messaging are not bad. How can we get it right? And where do we start to listen so that it means something? And from the learning, the answer is actually with a plan. So on the left, really what we're talking about is using a little bit of research and planning skills to make our main contact strategies meaningful. So, in this first portion on the left, we're using those online skills, listening skills and monitoring to learn about and engage authentically with people. It's a little bit slower than firing out a message on LinkedIn to a hundred people, but I promise, you'll net more. So, on the left here, planning to listen, this is really the passive portion. We're watching, thinking and loosely engaging. So like Scott had mentioned before in the chat, what is loosely engaging? Loosely engaging is a comment, a like, a share, something that would not be a targeted prospecting activity. It's really to show general interest in a gentle way. So that's what we mean. So, we're monitoring and loosely engaging. So the next takeaway for today after the first one is in planning to listen, we need to answer certain questions and set up streams to monitor key activities online or figure out how else we can do that.

So first question, where are my prospects? We went through that in the first session, but it's actually really important because oftentimes we choose platforms that we like to spend time on and scrolling, but they're not actually where our prospects are. So you need to identify that. And you need to separate if my prospects are on LinkedIn, but I like Instagram, I need to understand that my Instagram time is fun me time and not prospecting time. And so you need to know where your prospects are frankly, and write it down. Because all of your other activities will be built around that. Second question is, what do my prospects have in common? And so this goes back to Stacy's answer and a couple of other people's answers too. What do they have in common? Setting up streams on your Hootsuite or monitoring hashtags, industries, news, influencers, leaders, big company leaders, things like that.

What's happening in their industry? What are their interests, news, and leaders? So, monitoring that, again, and doing some loose engagement around that. Next is, what's relevant to my business as a business owner, as a financial planner or advisor? What's happening in my industry, my interests, my news, and my leaders? So having a separate stream for that, so that I can mix the two. If I know something's happening in my industry about mortgage rates or whatever it is. If something is happening in my industry, then I can match it up with an interest or a need from the other industry. Then I can show my expertise, but I need to know what's happening. So, setting up streams that way. And then what am I listening for? Based on your own clients, what are you listening for?

It could be that you love working with families. So what you're listening for is life events. You're listening for comments and likes on posts of yours about... If you're doing a post about financial health and somebody likes it. You're listening for sharing on Facebook, the very popular in December, sharing on Facebook about how everybody's broke, and it's Christmas time. But that's a form of listening. People don't share that stuff who don't agree with it. So very much based on your market, you need to be listening in on what's happening. So, you're listening for struggles, you're listening for questions, and you're listening for events too. Events that they're going to, events that they're hosting, who they're hanging out in a professional capacity.

We really want to be spending time looking at our platforms with all of this key information in mind. So, at the end of the day, we can monitor all day long. You could monitor for hours and hours. But if we don't refill the pipeline, we're just window shopping. Which brings us to the second portion, active searching. Here we are. We're engaged in activities to fill the pipeline with new leads. This is what we're here for. Forget everything else. Okay. Look on the right, we're looking at actively searching. So, on LinkedIn, I'm going to focus on the free features. If you have premium, that's amazing. Awesome. But I'll focus on the free stuff. So, on LinkedIn, we're looking for advanced search. So that's where we can cut it by geographic region. We can cut it by industry. We can cut it by level or key people.

So, when looking at advanced search, think about Jasmine. If you're not sure what you are going to do, think about Jasmine. She's only looking for who? She's looking for anybody in the food industry. She's looking for people who work with people in the food industry. So maybe she's looking at food carriers, food providers. When she'll follow them. She's looking at commercial realtors because they lease or sell. Yes, they did. They lease or sell properties to the business owners. So getting in there would be a great... she's really only searching for those people. She's not interested in a residential realtor from Summerside. That's not her deal. She knows what she's looking for and who she's going to search.

Then I wanted to just talk briefly about second-degree leads for introduction. I have a lot of people around me. But I am searching for food industry professionals, and I come up with Herman. Herman knows Julie. And I know Julie and I are connected, but I don't know Herman. Now Julie becomes a middleman. So, the focus is monitoring Herman, engaging with Herman's posts, et cetera, commenting. Whatever the thing is, right? Learning about Herman because I know that he owns three restaurants in town and they're a chain. But then it also becomes about Julie, because I need to get to Julie first because I want an introduction. I don't want to cold message Herman. So, it becomes about the second-degree leads. So, look at who you know, and then look at who they know. So, when you're searching people, look for people specifically who are second degree leads because there's a high probability that you can work on that and get either an introduction or end up in a situation together, where Herman comments on Julie's post, and then suddenly you're commenting on Herman's comment and liking Herman's comments. So suddenly, you have a reason to connect with Herman. But it was through Julie.

That was a really long-winded way of explaining that, but I'm just saying it matters. So next is alumni and then client relationship management. We're going to go into that in a quick second. And then I'll always look at people you may know. They'll say, oh, people you may know. And it's like a banner and it's like, ugh, I don't know. Click on them. You don't know – they might have four or five people in common with you that are all in that same industry. Maybe they're all in the food or food-adjacent industry. Don't discount them.

So, there's that. The second one is trail of engagement. When you're actively searching, I'm going to show you an example of this. We really want to be cognizant of the trail of engagement. Likes, comments and shares on other posts; likes, comments, and shares on your posts; focusing on center of influence posts and engagement. So, we want to be really cognizant that that is actually a way to lead capture. And I'm going to show you an example. Here's the example. This is Bill's post. Bill and I are connections. Judy commented on it. Arash liked the post. Perfect. And then Jill shared the post from Judy's comment. So, Bill's a good connection of ours. He's a small restaurant owner who posted about his industry and what's happening. So, three new people engaged with Bill. What do we do?

We listen, we monitor, we check out Jill, Judy, and Arash. Are they related to Bill's business? Are they related to who we want to work with? Are they a possible center of influence? Who are these people? And then is Bill a lead? And are they a lead? How do you know if somebody's a lead? How do you know? Feel free to unmute or type in the chat. How do you know if somebody is a lead of yours? We seem to have this thought process that goes into our mind. We're like, "Oh, hooray. Suddenly Judy's a lead. So now Judy's a lead." Then we start working the lead. But what criteria do we have to meet for that? How do you define that? Okay, Devin says, "They may have a need for your service." Rachel, "Back and forth conversation, and the meeting is set." So, you know something's going to happen, right? They've reached in, maybe they have a need. They seem interested. Scott says, "They've engaged with your content." But is that enough, Scott?

**Scott:**

So, I don't know if it's... I wouldn't call him necessarily a warm lead yet, but I would call it a solid prospect. I don't know if that's the way we would label it.

**Shawna:**

Okay. No, I think you've hit it on the head because most people would describe a lead as an early prospect. So, there's some kind of interest there. And that's usually how we have defined it. But I'm going to propose that we rethink this a bit. We tend to put the label lead on someone who is already pretty engaged in the process with us. We know we have a good chance of maybe getting a meeting in talking with them. So, they've put in some work to be interested. It's someone who's maybe already reached out or expressed interest. But if we're waiting to criteria somebody as a lead only after they've done those things, I would propose that we will never fill the pipeline. And that puts most of the work on the prospect or lead themselves to get themselves to that stage of being interested, of reaching out, of asking for our help or asking for our opinion on something.

It puts a lot of the journey on them. Because the most difficult part of this whole situation from beginning to finished client is getting them in the door for the appointment. So, I'm proposing that a new way to think about it would be to take the power of that label back, that we decide who is the lead and put the onus on ourselves to move them meaningfully into engagement. This is somewhat of a mindset shift. It means that we set much looser parameters that define leads. It could mean that someone engaged with a post or liked or commented. Or that someone you know had a life event. We then take these seemingly innocuous observations and plan a way to reach them in a way that's relevant and meaningful. Does it mean that we could end up with a lower rate of conversion? Yes. But if we take onus to move people from whatever these events or these observations are to being a lead, you have a full pipeline all the time.

And then, so it's up to you to convert, frankly. So, I think that in taking the responsibility and accountability, but also the power of that label, we can fill our pipelines much more robustly. And if we have a good plan to contact them after these engagements, after these small engagements, then I think you can win a lot of the time with messaging or phone calls that are more meaningful in nature than a cold message with spelling mistakes on LinkedIn. So, making a plan in a CRM can seem like a waste of time for each person. But if done correctly, it's the difference between a client or a cringe moment, honestly. And if you do it well and you take the time, it can work really, really well for you.

So, you're putting in all this information. Hopefully you're using Workspace. But you're adding new leads. You're putting in this information that they liked or commented, their industry. And then as you're following them and they're asking questions and posting new things, if it's relevant, you're adding more notes in so that if something changes with them or something happens or you feel you know enough about them, then you can send them a message or call them and talk to them because you know more about them. And if you do this in a process, it can become a lot. It could become very efficient, especially if you have staff to help you. If you have an MA or something like that, and they can help you with CRM inputs.

So, once you've done the research and engaged on the surface, like, comment, share, those things, and we use our CRM to make a plan around how we're going to contact people, you should really ask yourself a couple questions. One, would I want to be contacted with this message? Might I respond? Might this be meaningful to me? And then, does it sound genuine? Would I answer this? And if the answer is no, I wouldn't answer a LinkedIn message, then make a new plan. So, it's really about creating a loose plan on how you're going to communicate with people. And it may be email. It may be booking a meeting. Having a 15-minute coffee chat with somebody on LinkedIn who's in an adjacent business, and you're picking their brain about... you have a lot of clients in this business and you need to pick their brain about something about what's happening.

So however that works for you, that's the plan that you need to use the CRM tool for. And if you're three and under, you absolutely should be talking through this with your BDA, who will be one of your best advisors as far as mentors, on how to do this. And you can role play a lot of it out with them. And you can show them messages and they'll tell you, "Yeah, that's great. I would respond to that," or, "No, I wouldn't." So, it's really about refocusing the lead on creating a relationship. If I'm trying to get you to buy something, this is all a bit dodgy. But if I'm trying to create a relationship with you, all of my interactions are to build trust and build kindness and then to be of service to you. And then, so then my final message, my final call, my final whatever, which is that main activity needs to be all those other things, but better because ultimately, I'm asking you to be in a relationship with me for 20 years.

So short of a ring and flowers. You got to make it good by some stretch by being kind and of service and showing your expertise. So I know we're getting close for time. So as far as prospecting and engagement, if you look at it just quickly in a workflow, really looks like defining your objective, listening, that active searching portion that you should write out, capturing who you find, and then making a plan and try it. It seems like, "Oh my gosh, am I really going to capture these people on LinkedIn and like and comment, and I'm going to capture them in a CRM as a lead?" But just try it for a couple months and see what happens. And monitor how you feel when you're talking to these people or contacting these people after a month of a comment or share or whatever. And capture how you feel because it should feel better. It should feel more natural. It should feel like prospecting is enjoyable and it's an engaging experience for you and the other person. And it should feel that if they're not interested, that you can walk away and think, "I did great and I'll still follow you and all the things, and if you're ever interested in the future, let me know." But it doesn't feel like this breakdown rejection. It just feels like it's not the right time. And that's fine. It's a lot easier to deal with because done properly, it should remove a lot of that rejection feeling if you're focusing on the relationship. So, with that, we're like right at time. Sorry guys, I just wanted to go a bit slow. Does anybody have questions? We went through a lot. And I know it was a lot of watching and listening, but I appreciate the engagement. Thank you Rachel and Scott and Devin and Joe and Ken.

**Scott:**

I have a comment more than a question, if that's all right. I know that we're over time now. But one thing, I think this has all been fantastic advice and certainly very valuable. One thing that I've noticed on my LinkedIn account, when you're talking about rejection and relationships and those feelings, I sometimes get frustrated. I go on LinkedIn. I share very personal posts. I really try to share my personality and show who I am. I have over a thousand followers, I think. And I'll post something, and I'll go back three days later and be like, "I have one or two likes on that." And I find that to be a very depressing... It makes it harder. To your point about rejection. Someone here at head office challenged me when I was talking about that one day and said, "Well, Scott, when you're scrolling LinkedIn, how many other people you're following are you liking of their stuff, are you commenting on their stuff, are you sharing their stuff?"
And I have noticed, and I think this is a simple trick, seek out other professionals that have networking as part of their business. I follow real estate agents now. And every time I see something they're posting, I share it. I like it. And you know what? Now the likes and shares are five to 10, right? Because there is a simple human trait that if you're sharing my stuff, I'm more likely to share your stuff. So, I would certainly encourage as well, while you're doing the social listening, while you're scrolling LinkedIn, Facebook, that kind of stuff, just take a moment to like, comment on other people's things, share their stuff. And you're going to see you're going to generally just get better results just from that activity as well.

**Shawna:**

Absolutely. And I would definitely agree with that. And it's all about being a connector and not a megaphone and having general interest and wanting to create genuine connection. And I really think that that's so important. Just as a reminder, please take the survey. I mentioned it at the beginning. It's at the top of the chat. So let me see if I can pop it in now too. There we go. I popped it in at the bottom. But yeah, it's really important to just be engaged with the people that you want to engage with. If you're going to be setting up a 20-year relationship with these people, for God's sake, like their post. Especially if it's a prospect where you're like, "I really want this person to work with me. I feel like this would be amazing for them and for me," like their post. Put it out there.

**Scott:**

Congratulate them on the birth of the child before you make the phone call to say, "Can I sell you a critical illness policy?" Yes.

**Shawna:**

Yeah. It's little things like that. But obviously, we're over time. So if you need to hop off, hop off. And I appreciate everybody. Everybody being here. And if you need any help with your Hootsuite digital agent docs, email fieldmarketing@canadalife.com.