

Marketing Tools for Financial Advisers

How to Network Online



About this guide

Cigna wants to support you to become more proficient with digital marketing. In today's world, managing your online presence is essential part of building and maintaining a sustainable client base and profitable business.

This guide is part of a series designed to help you develop an online presence that aligns to your business and supports your marketing activity. Please use your own discretion when applying the general advice we've provided in this document.

What we cover

In this guide, you'll learn about:

- So, why network?
- LinkedIn
- Hosting an online event & following up leads
- Join Facebook Groups
- Neighbourly
- Useful Resources

So, why network?

Insurance is a financial service that's based around people. When you're providing risk solutions to protect your clients, their families, businesses or employees - you're dealing with real lives. To many, the idea of insurance makes more sense when we talk about lifestyle, goals, legacy and family - rather than dollars and cents.

Relationship is everything

Building relationships and referrals is arguably more important than direct marketing and advertising. Your clients both existing and prospective, rely on you to bring them the best insurance solutions for their needs. It's important they trust you as someone that will offer impartial advice, free from any bias.

Grow your reach

Networking is simply growing the number and strength of your working relationships. In many cases, it's a matter of connecting with your community effectively. The great thing about effective networking is that you will experience a snowball effect through word of mouth beyond the immediate clients you interact with.



LinkedIn

First up, the business networking tool, LinkedIn. If you aren't on LinkedIn, stop reading this, join [LinkedIn](#) and come back once your profile is live. This social media channel is critical for professionals looking to network and grow their awareness in the market.

Dedicate time to connecting with people you've interacted with

You should start building your network with previous customers, co-workers and other insurers you work with. These people will be the most likely to accept a connection request rather than those you've not interacted with.

Find connections from your:

- Phone contacts
- Email contacts
- CRM database
- Facebook friends who you know from a professional engagement

What does connecting actually involve?

Once you've found connections on LinkedIn, you will request to 'connect' with them via the prominent blue button next to their name – either within their profile or under the My Network section's 'People You May know...' suggestions.

When you reach out with a connection request, they'll be notified and either accept or decline your invitation. As LinkedIn suggests, a connection request with an accompanying message can help give context to the connect. Why are you connecting with that person? Do you have mutual friends, have you worked together in a past life? Are you from similar backgrounds?

Make new connections – with a message

A new connection isn't always about a potential customer, but building your awareness in the market. That means connecting with other advisers (who you may be able to share a referral arrangement with) and those who work for insurers. Whoever you reach out to, make sure you have a compelling reason to – and use that to write a message when you send the initial connection request. For example: 'Hi Ian, I liked your comment on ____'s post about financial stability and noticed you work in the same field, hope to connect and share some more useful insights about our industry!'

Actually post!

Connections are one thing, but posting advice, insights, and shares will keep you in people's feed on LinkedIn.

Posting should be a mixture of your own thoughts (written and video combined is great), and sharing industry articles with your network, too.

Just take care not to overload your audience with promotion or unhelpful content – just like Facebook, it's easy to unfollow or even remove a connection.

So what should I be posting about?

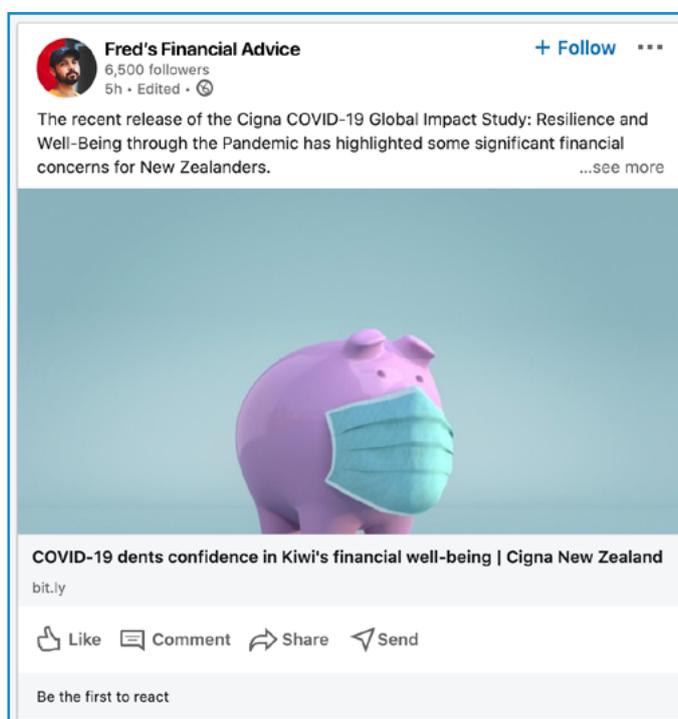
As a financial adviser there's a variety of topics where your perspective would resonate with the LinkedIn community. What do you have to say about:

- Budgeting challenges
- Covering a business interest / challenges of starting a business
- The financial side of starting a family
- The job market and economy
- Insurance myths
- Current events
- Your commentary on others' advice

Why not try video?

If you haven't done a video post before, give yourself plenty of time to do practice getting comfortable talking to your phone or web cam. A video communicates much more in a shorter period of time than written communication, and for many topics, it'll get better engagement.

Keep the video content centred around one topic and try keep it to just a minute or so. The equipment you use can literally be a webcam, but do make sure the audio and lighting are good enough that it doesn't distract from the information you're providing.



When should I post written thoughts?

Not every topic needs a video, and the LinkedIn community does read newsfeed posts willingly, especially if the opening lines contain something of interest. An example of this is opening with some interesting statistic or a thought provoking question to be answered.

Consider using LinkedIn as a way to invite others to have their say as well. You don't need to always be the source of information – and often facilitating discussion on LinkedIn will help your engagement and organic reach as the comments start to grow.

Comment on others' content

Networking is as much about listening and engaging with others' ideas than it is sharing your own. By commenting on your connections' posts with your own thoughts, you're not only strengthening that relationship, but your name, profile and comment is now visible to that connection's *own* network. Many people find new connections by reading comments, so be that person!

How your network size can snowball

The more connections you get in place at the start, the more connection suggestions LinkedIn will suggest. You will discover plenty of connections this way – and some people that you may have already met and simply forgot to add. Sharing posts that are shared or interacted with will also put your name in front of people who aren't connected to you but those in your network. This means that you can get new connection requests off the back of good insightful posting. So keep at it!

Viewing profiles

Unlike Facebook and Instagram, LinkedIn by default tells people who looked at their profile – this can be a good way to indicate to someone you're interested in chatting further. But do note that if you don't want people to know when you've viewed them, you'll need to adjust this in the privacy settings – it just means you also won't be able to tell who is viewing your profile.

Hosting an online event & following up leads

If you can build your own online Q&A, seminar or talk, you have control over what's said and how it's marketed. For something like insurance, you might want to create a webinar based around a certain theme. With attendees opt-in you can then follow up after the event to explore any further help they may need.

Theme the event around something people care about

Simply advertising an 'insurance 101' webinar is probably going to struggle to get people tuning. However, speaking to an issue that's immediately relatable such as 'Are You Supporting Your Family's Financial Future?' will appeal to more than those just in the market for insurance.

Market the online event properly

A virtual event will only be successful if people know about it and can attend it easily. Think about using an event creation tool like [Eventbrite](#), where attendees can register and add a reminder to their calendar. Then, push the event on a cost-effective channel like Facebook Advertising using your business' Facebook page (see our separate guide on setting up Facebook for your business). Give yourself plenty of lead in time to build the attendee list.

Make the event memorable

Prepare an interesting talk that's not just you speaking, but includes visual elements, stories and potentially guest speakers. This is a good time to showcase your expertise by opening up a Q&A section at the end. And while a digital webinar makes it tricky to give attendees something physical as a thank you for coming, you might want to offer something more practical like a voucher or free ebook.

Follow up attendees

Once you've hosted your event, make sure you follow up with attendees. To get their details, you need to be careful to ensure they explicitly opt in to being contacted.

Getting opt-ins to follow up contact

This can be done via the registration process through an event platform like Eventbrite or manually with attendees online such as sharing a form to sign up to updates. You should be able to export attendees for contact via most event providers as well.

If you use Eventbrite, you can read their guide around healthy email practices for registration contact [here](#).

If you hold the event and look to get leads during or post the event, here's an approach that might work for you:

1. State in the webinar that you will be asking attendees to subscribe or receive follow up material via email at the end of the event.
2. As you wrap up your talk/Q&A etc, share a link to a simple Google form that you created earlier.
3. Ask for the absolute minimum details required to contact – eg a first name and email address.
4. With your list of opt ins, do an initial summary email of the event and make it easy for people to opt out at this stage. If you use an email client this will enable recipients to unsubscribe quickly.

What should my follow up include?

The follow up email can add some additional value to your attendees. You'll need to think about the next logical 'Call To Action' – whether it's a request to follow your business online or a request for a call back to chat about insurance options.

How do I find an email marketing platform?

With your opt-in email list in place, you'll be able to craft email campaigns via a tool like MailChimp or Campaign Monitor. There are many different tools available so make sure you pick one that's right for you.

Your email platform will enable you to design branded email marketing, manage your recipient lists, and get valuable stats on open rates and clicks within the email.

Important things to note:

- You may want help from a designer to brand up a good email template if this becomes a long term comms channel.
- There will be a cost involved in having a tool like this (usually subscription based).
- You'll want to keep growing this database through a variety of ways like a sign up to mailing list section on your website.
- You need to observe all privacy and electronic communication laws – read more about this [here on the DIA website](#).
- Email out at a frequency no longer than a month apart, and make sure you have valuable content.

Join Facebook groups

Facebook groups are the more modern version of the message board. A quick look on Facebook and you'll find dozens of groups that reflect a combination of your target customer, subject matter and location. While most of these groups' rules are careful to prevent unsolicited advertising, you can become a regular contributor and make sure your own Facebook profile clearly states who you are and what you do.

Find the right groups

Some groups are heavily based around community discussion about interest topics or matters relating to their area such as a neighbourhood watch group or a community noticeboard style group. While some may openly welcome some gentle self promotion on threads that ask for it (eg 'does anyone know a good insurance broker?'), others may clamp down on any advertising with a ban. We'd suggest joining groups with a discussion topic that aligns with your expertise – think financial, family, budgeting type groups.

Become an active member and commenter

Part of building your authority to these groups is becoming a well-respected contributor to discussions, not just those where you've got some professional interest in. For example, you may wish to share a personal experience about budgeting without any mention of your financial adviser background. Then, when posts come close to what you provide, you'll have existing trust by the group to make mention of your IFA expertise.

Communicate with admins

Admins of groups take their role very seriously to keep the group somewhere that members stay engaged with. Some groups will allow some sponsorship or promotion (such as a pinned post), so if you see an opportunity, don't hesitate to reach out to the admin directly via a direct message (DM).



Wellington Community

Public group · 1.7K members

About Discussion Members Events Media

Join Group



Unread Announcement · 1

 **Ashleigh Cooper** updated the description.
February 27, 2017 · 🌐

👋 Welcome 🎉

🇳🇿 Wellington Community Page 🇳🇿

We Welcome Post That Offer:
Item... [See More](#)

👍👍👍 17

2 Comments

👍 Like

About

👋 Welcome 🎉

🇳🇿 Wellington Community Page 🇳🇿

We W... [See More](#)

🌐 **Public**
Anyone can see who's in the group and what they post

👁️ **Visible**
Anyone can find this group.

🇳🇿 Wellington, New Zealand

Neighbourly

It might not be immediately obvious, but community websites like [Neighbourly](#) are a good way to communicate with your locale at a grassroots level. With its dedicated business section, Neighbourly can be used to market your financial advice services alongside other home services being advertised. The insurance community wants Kiwis to feel as comfortable talking about insurance as they are asking for a plumber recommendation.

Use the right function

Don't advertise your business through your personal profile; Neighbourly, for good reason removes these. Instead go through the dedicated business function - [instructions here](#).

Make your post fit the Neighbourly tone

Going too salesy or formal won't land particularly well on Neighbourly. Remember, this is a community noticeboard for people wanting to borrow a wheelbarrow or sell firewood - so try and craft creative that gives you a personal touch. Talk to your locality, benefits (eg free to use) and add info about *You*. Add a call to action that is approachable and informal, such as *'Hey, I'm John a local to Johnsonville and a financial adviser. I'm looking to help out my local community with their insurance. Get in touch if you want to chat about covering you, your family or your business. Happy to meet locally somewhere or visit at home any time.'*

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Discover Your Neighbourhood

1,000 neighbourhoods across New Zealand are using Neighbourly

[Find Your Neighbourhood](#)

By signing up, you agree to the [member agreement](#) and [privacy policy](#)

or

Have an invitation code?

[Next Step](#)

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Useful resources

- [11 Tips for Successful Business Networking](#) - Business Know-How
- [20 Ways To Build a Strong Business Network Without Leaving Your Desk](#) - Forbes
- [Four Tips To Network On LinkedIn](#) - LinkedIn Blog