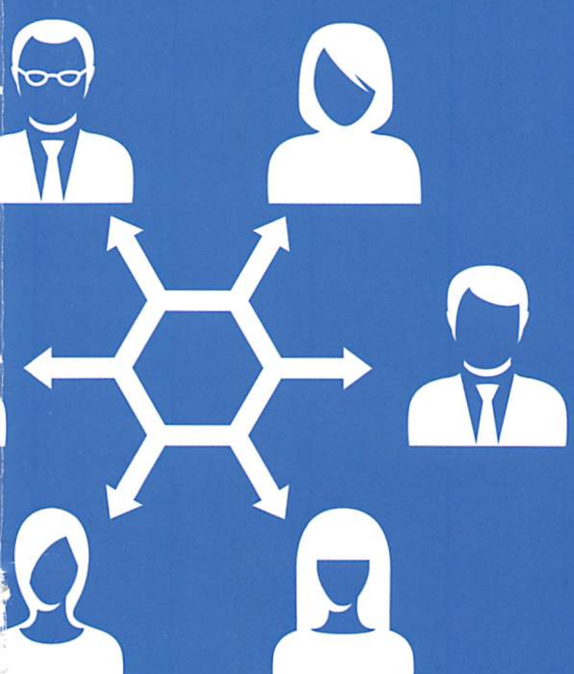
The SOCIAL Advisor's Guide to BUSINESS BUILDING On LinkedIn™

LEVERAGE YOUR NETWORK
TARGET PROSPECTIVE CLIENTS
INCREASE YOUR VISIBILITY



66%
OF ADVISORS PROSPECTING ON LINKEDIN™ GAINED NEW CLIENTS*

33%
INCREASED AUM BY $1M+ AND 12% INCREASED AUM BY $5M+*

BMO Global Asset Management

*Sources: LinkedIn™, LinkedIn™/Cogent Research.

STRATEGY

LEVERAGE Your Network

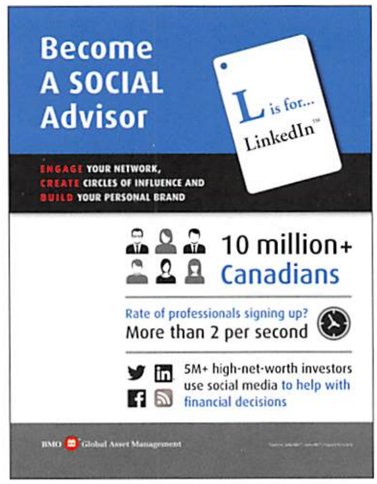
TARGET Prospective Clients

INCREASE Your Visibility

LinkedIn™ is an effective brand-building – and prospecting – tool, given the potential to reach your existing contacts; leverage those connections to cast a wider net; take strategic advantage of centres of influence; and become a visible thought leader, able to fully communicate your value.

On the pages that follow, we'll walk you through some easy, yet essential, actions you can take on LinkedIn™ to complement your "offline" efforts to grow your business.

Recognizing the power of social media to elevate your personal and professional brand, we created ***Become A Social Advisor*** – a practical approach to getting started on LinkedIn™ or maximizing your existing online profile.



If you don't have a copy of this must-have Guide, contact your BMO Global Asset Management Regional Sales Representative.

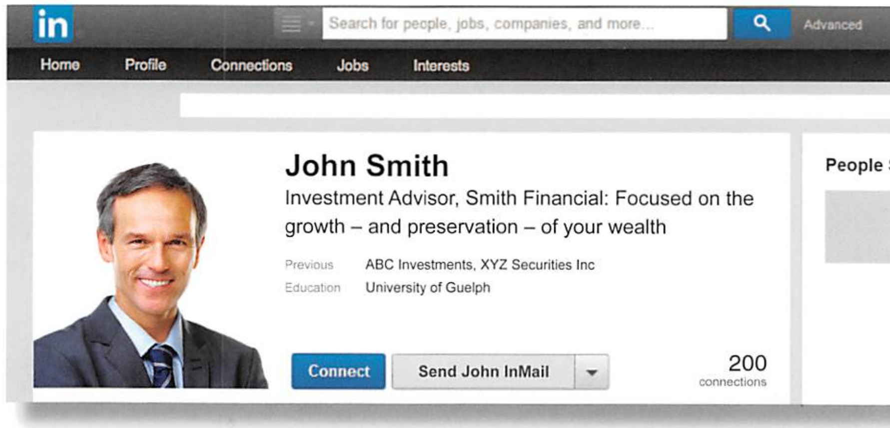
In this companion piece, ***The Social Advisor's Guide to BUSINESS BUILDING On LinkedIn™***, your success story continues, as we take you, step-by-step, through a methodical and SIMPLE approach to leverage your existing network for referrals; seek out prospective clients; and stay top-of-mind with those most valuable in your book – all with the goals of growing your practice, and communicating your value, to a continually evolving client base.

TABLE OF CONTENTS:

LinkedIn™ is an exceptional tool to create meaningful connections, and another way for you to turn warm leads into realized aspirations. As your partner, we're dedicated to helping you get there, and to exceeding your expectations in the process.

MEET JOHN SMITH, SOCIAL ADVISOR

John Smith is an experienced Investment Advisor with a thriving practice in Kitchener-Waterloo, Ontario.



Among the high-value clients he's identified in his book are IT executives at a global company with an outpost in the Kitchener-Waterloo hub, doctors at two local hospitals, and several successful business owners.

With demands on his time, including servicing existing clients, staying on top of the markets, regulatory requirements, and the administration involved in running a business, John seeks an **efficient** way to leverage his existing network, and pursue referrals to other professionals in the area.

As a complement to his business-building strategy, John is ready to use LinkedIn™ to effectively:

- **engage** his top-tier clients and consistently communicate his value
- **position** himself as a thought leader with all by providing relevant content
- **expand** his network to facilitate introductions, connections and referrals to high-value prospects
- **grow** connections with centres of influence, including lawyers and accountants

1st

Steadily increasing his "1st-degree" connections, composed of clients, friends, colleagues, alumni and local business owners, he'll then leverage this social media platform to cultivate a broader network filled with possibilities.

In this Guide, we'll follow John – a *Social* Advisor – as he uses LinkedIn™ to build his business.

UNDERSTANDING THE LINKEDIN™ NETWORK

Your LinkedIn™ network is an important asset in your online arsenal, as the more quality connections you have, the more quality connections you'll be able to make.

JOHN

John is at a place in his business where he's refining his book to focus on his top-tier households: clients who demand – and value – more sophisticated, holistic advice and service – and are also likely to make referrals to similar top-tier prospects.

His first step is to cultivate **1st-degree** connections on LinkedIn™ (current clients, colleagues, influencers, etc.) as a way of staying top-of-mind with his most valuable contacts, while enhancing service levels – and his personal brand – through more targeted, regular communication.

1st

1ST DEGREE 1st

On LinkedIn™, existing connections are known as "1st degree." The contacts your 1st-degree connections have (and that you do not have) are referred to as 2nd and 3rd degree. The more 1st-degree connections you have, the more people you can see on the next two levels and mine as prospective contacts, sources of referral, or – ultimately – valued clients.

WHO THEY ARE: Direct connections you invite – and those who invite you to LinkedIn™.
HOW TO CONTACT: Click Send a message

John will use his 1st-degree contacts to cast a wider net to like-minded individuals, in an effort to further skew his client base to affluent professionals who match his targeted minimum investment threshold.

2nd

2ND DEGREE 2nd

WHO THEY ARE: The contacts of your 1st-degree connections.
HOW TO CONTACT: Click Connect, send an **InMail**, or use the **Get Introduced** feature – all at the top of their profile page, near their photo.

3rd

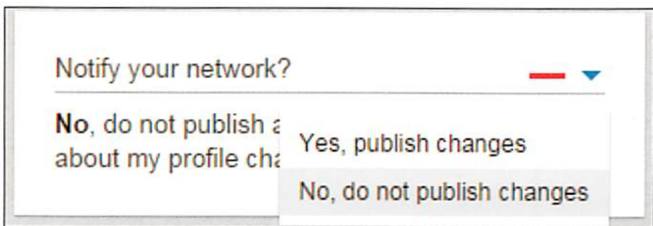
3RD DEGREE 3rd

WHO THEY ARE: The contacts of your 2nd-degree connections.
HOW TO CONTACT: Your connection options will depend on your familiarity, and include sending them a **Message**, **InMail** – or request to **Get Introduced**.

PRIVACY SETTINGS: TAKE NOTE!

Before you set out to connect with your clients, and leverage your contacts for referrals, take the time to consider your privacy settings.

You may want maximum exposure or you may want to control who can see your profile – such as competitors. You'll want to alert your chosen network when you've posted a comment, article, or whitepaper, or are trying to start a conversation about a topic that will showcase your expertise.
All of these features are part of your privacy settings.



When making changes to your profile, LinkedIn™ will ask you if you'd like to broadcast the changes to your network. Remember to select NO when making <u>small</u> updates (e.g., uploading a new photo).

TURN ON/OFF YOUR ACTIVITY BROADCASTS

SET TO: Let people know when you significantly change your profile, make recommendations, or follow companies.

SELECT WHO CAN SEE YOUR ACTIVITY FEED

SET TO: Choose "Everyone" for maximum exposure.
Note: This is for status updates (e.g., posted articles, Likes, Comments, etc.).

SELECT WHAT OTHERS SEE WHEN YOU'VE VIEWED THEIR PROFILE

SET TO: Your name and headline.
Note: If you repeatedly view someone's profile, however, they will know you are "lurking."

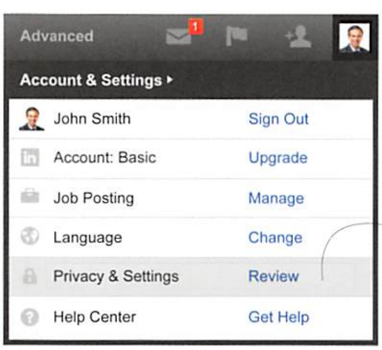
TURN ON/OFF HOW YOU RANK

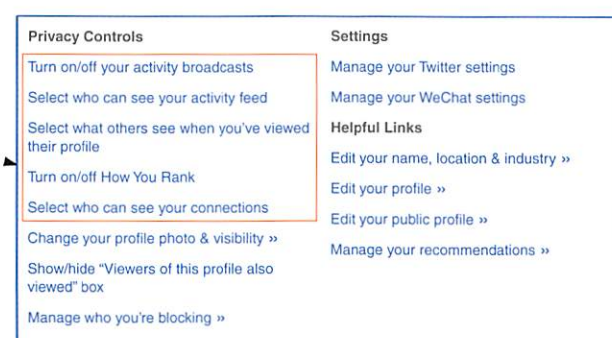
SET TO: Let others see how you rank.
Note: If you turn this off, you can't see your own rankings.

SELECT WHO CAN SEE YOUR CONNECTIONS

SET TO: Your connections.
Note: If you turn this off, you won't be able to see who viewed your profile – a topic we'll cover on page 19.

Leave all other options on the default setting.





PRO TIP

"Viewers of This Profile Also Viewed" provides you with profiles to visit that have a commonality. This can be used as a prospecting tool – allowing you to see people similar to your prospective clients – and similarly, it could also lead a prospect to a competitor. If this is of concern, you can hide the feature in your settings. For more information, see page 18.

GROWING YOUR NETWORK

Search for – and Invite – Those You Know

JOHN

John's online growth strategy is a complement to the way he runs his practice: seeking referrals from existing clients whose networks include other high-net-worth doctors, IT executives and business owners in Kitchener-Waterloo – introductions that inherently communicate trust. LinkedIn™ can help him cast a wider net – and "pre-vet" these targeted prospects by reviewing their profiles.

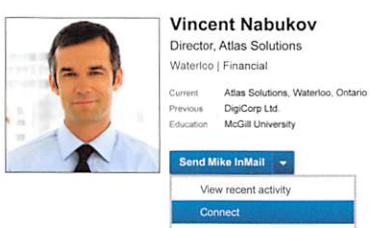
LinkedIn™ is a multi-purpose tool to help quickly enhance your visibility and create new connections. While it will enable you to stay top-of-mind, and efficiently communicate your value to existing clients, the real power is its ability to help you:

Successfully leverage this targeted channel for introductions to those who may already be familiar with your areas of expertise. (Note: Ensure your value-add is well communicated in your LinkedIn™ profile.)

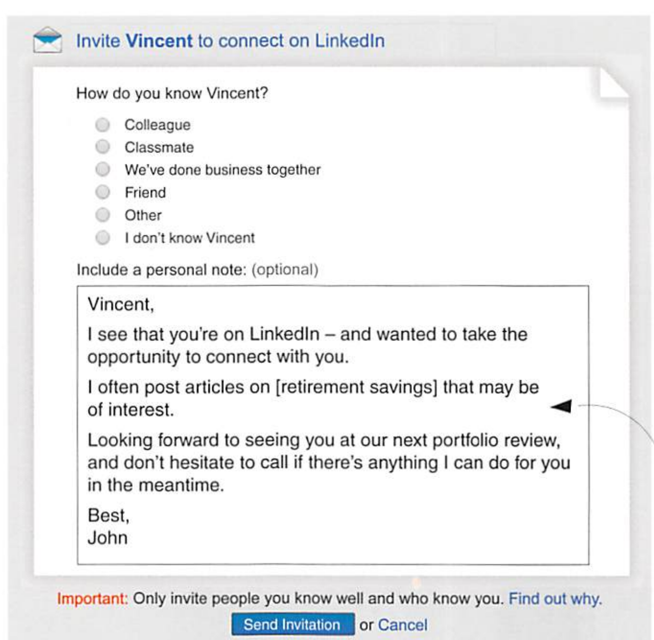
Tap into the networks of your circles of influence – lawyers, accountants, tax specialists, mortgage brokers, fellow club members (e.g., Rotary, Chamber of Commerce, etc.).

Offer reciprocal introductions to those in your network.

The first step is to connect with your existing contacts on LinkedIn™. The easiest starting point is to use the LinkedIn™ **search bar** at the top of the page to find those you know, and send them a personalized invitation to connect.



If a contact reaches out to you, send them a personalized thank you message when you accept their invitation. This might also be an opportunity to send them an article, video, meeting reminder, etc.



PRO TIP

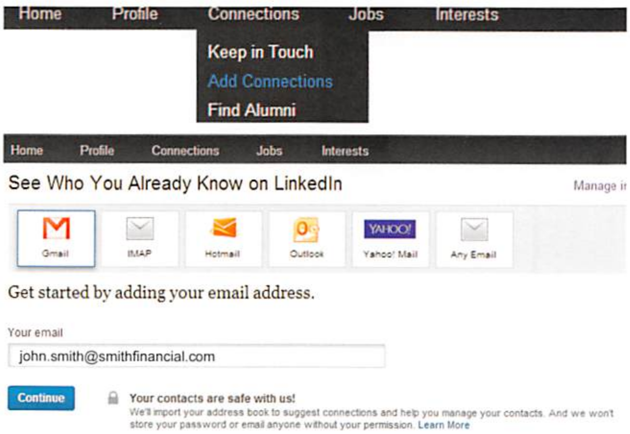
Personalize your invitation to connect – and whenever possible, integrate your skills and niche expertise to resonate with the recipient; e.g., let Business Owners know you work with others on estate planning, business succession ideas, etc. Similarly, tell doctors you've been helping other medical professionals with tax planning strategies and personal incorporation.

Keep it brief – LinkedIn™ has a 300-character limit on invitations.

GROWING YOUR NETWORK

Import Your Address Book

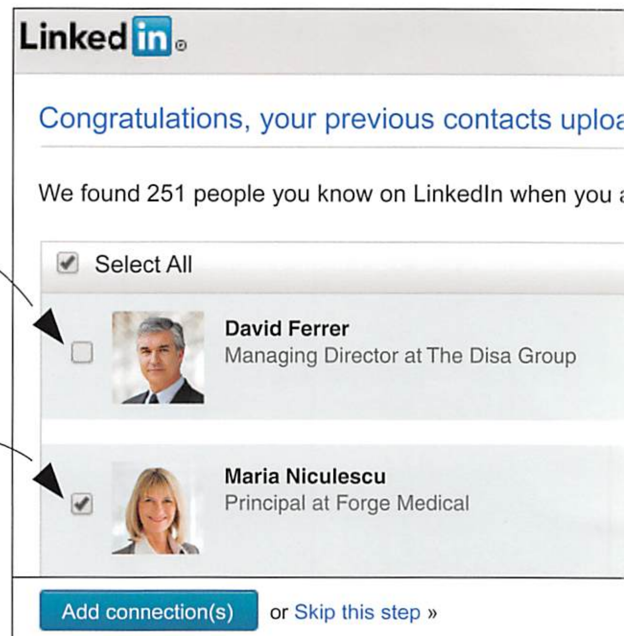
As a networking tool, LinkedIn™ offers a way to cast a wider net *quickly* by importing contacts from your address book. While growing your network is at the core of LinkedIn™, this method of connection comes with a caveat: if you "Select All," you could be adding people you do not wish to be connected to – and LinkedIn™ "auto-generates" an invitation. There is a way, however, to use this feature to help you search, and still be judicious:



Under **Connections** in your navigation menu, go to **Add Connections.**

Select your preferred email account (the one that contains your address book) and enter your address as instructed.

Click **Continue** and then **Accept**. Next, LinkedIn™ will scan your address book and present you with a list of your email contacts – those with LinkedIn™ accounts, followed by those without.



PRO TIP

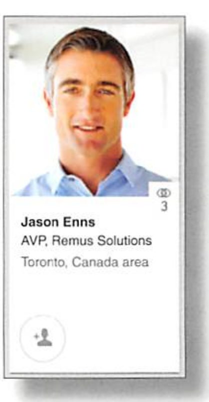
You can repeat this import process for all other e-mail address books that you use.

DE-SELECT

- Individuals of high value, **so you can send them a personalized invitation to connect**
- People that you do not wish to connect with on LinkedIn™ (including competitors, clients that are part of your disengagement strategy, etc.)

SELECT

- All others will receive a generic invitation from LinkedIn™



ALUMNI

From the top navigation, click on **Connections** > **Find Alumni**

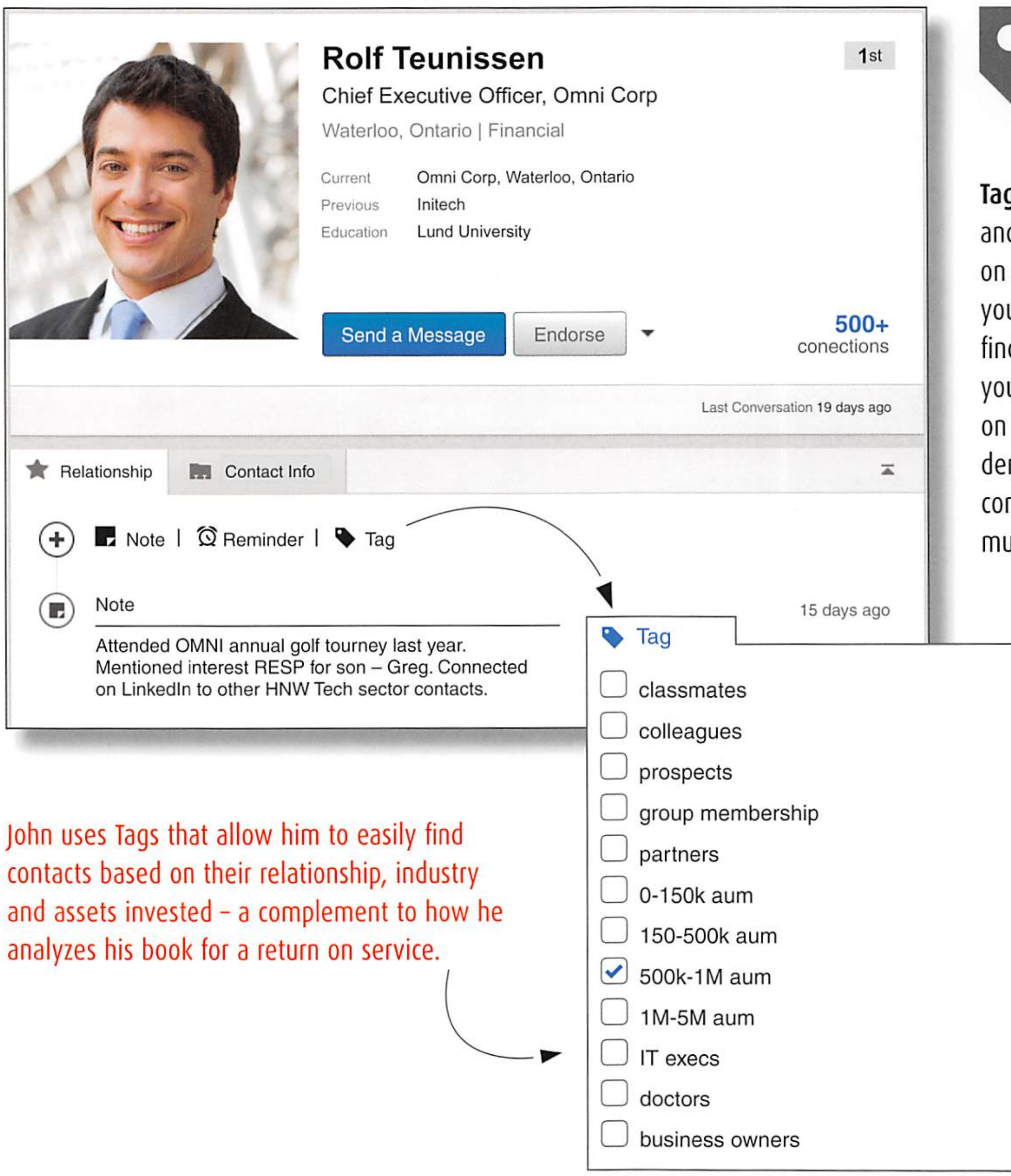
Alumni are educated, potentially affluent, and you already have a common history to break the ice. Pay particular attention to alumni who are not yet part of your current network, as LinkedIn™ simplifies the ability to connect.

MAKE IT PERSONAL! Don't just click **Connect** – add a personal message that recollects your university days; compliments the individual on their current job, status or location; and sets the stage by quickly telling them where you are – and what you do.

MANAGING YOUR CONNECTIONS

Now that you're connected to your existing "offline" network, and have even begun to expand on those connections by inviting those that you know well, like clients, alumni, friends, family and business associates, LinkedIn™ can be a virtual CRM, allowing you to segment, set reminders, make notes, and keep tabs on their activity – and provide a forum for you to disseminate information that positions you as an expert.

Tags



Tags allow you to sort and filter contacts based on any number of criteria you've created. You may find it useful to segment your connections based on industry, portfolio size, demographic, etc. One contact can be assigned multiple tags.

John uses Tags that allow him to easily find contacts based on their relationship, industry and assets invested – a complement to how he analyzes his book for a return on service.

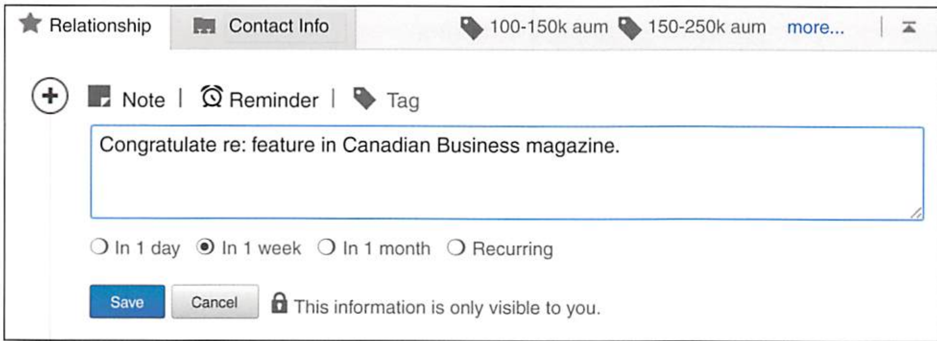
PRO TIP

Use Tags to create custom contact lists for following up, fast searches, and potential, targeted messages to a select Group of clients.

MANAGING YOUR CONNECTIONS

Notes and Reminders

Notes help you keep track of personal or business details such as a contact's career goals, family members, golf score, interests – and other relationship management details. It's a simple CRM tool readily available on your desktop.



If you set **Reminders** for your contacts, LinkedIn™ will notify you of an important event. This is especially useful for client – or prospective client – follow-up.

PRO TIP

Currently, Tags, Notes and Reminder features are not available on mobile versions of LinkedIn™.

After every client meeting or call, John sets a follow-up reminder for the next call.

MONITORING YOUR CONTACTS: SIGNALS ADVISORS SHOULD WATCH FOR

You should make a habit of monitoring your connections to keep abreast of developments in their professional lives, as reflected by status updates on LinkedIn™. They provide an opportunity to engage and interact.

Since LinkedIn™ activity is centred on professional and career milestones, look for indicators as a prompt to reach out. **Monitor the newsfeed on your LinkedIn™ profile page** and set **Email Frequency** in your **Privacy Settings** – to ensure you receive notifications of:

- Promotions, work anniversaries, job transitions, changes in location, etc.
- Profile updates including awards, postings, comments, etc.

PRO TIP

To quickly **View Recent Activity** of an individual connection on your way into a meeting, hover over the down arrow icon next to **Send a message** at the top of their profile. You'll be in the know – in an instant.

JOINING – AND LEVERAGING – LINKEDIN™ GROUPS

As an Advisor, joining Groups can be an important component of your growth strategy, because it allows you to interact with prospective clients and influencers who have a common interest; connect through Messages, Likes, or Comments; position yourself as an expert by sharing valuable content; and stay current on subject matter of interest to your network.

THERE ARE 2.1 MILLION GROUPS ON LINKEDIN™ WITH OVER 200 CONVERSATIONS TAKING PLACE EVERY MINUTE.

PRO TIP

Search Groups that are LOCAL when using LinkedIn™ to build your business. If the next step to virtual connection is an in-person meeting, geography is an important factor.

SELECTING THE RIGHT GROUPS

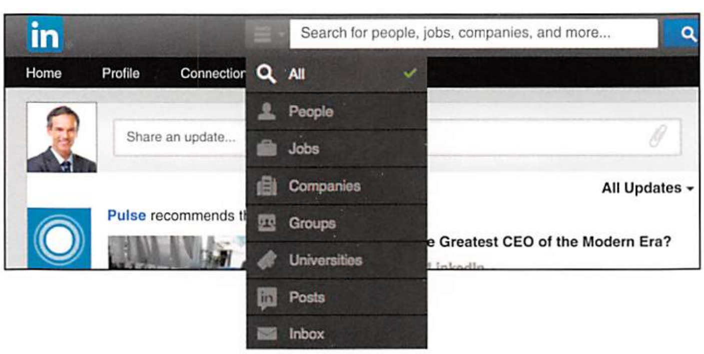
START WITH A STRATEGY: Look at your contacts' Groups for ideas of what to join. Their Groups may be a gateway to similarly high-value, prospective clients. **A boon to Advisors: On LinkedIn™, you can message a fellow Group member – even if they are outside your network.** For more on connecting with Group Members, see page 17 of this Guide.

OF NOTE!

You won't necessarily find new clients or referral sources in financial industry-related Groups. While they're helpful for practice management ideas, and collegial dialogue, you'll want to seek out Groups that are of interest to your clients.

Groups with large memberships and plentiful discussions offer more potential to access prospects; however, it may also be more difficult to gain visibility than in a smaller Group.

"Owners" dictate the rules, so you may not be able to join every LinkedIn™ Group you research. For example, if you're targeting lawyers as clients or circles of influence, and you find a Group to join, it *may* be restricted to members of the bar.



Enter a topic, keyword or location – or combine search terms for more targeted results. Consider:

- **Geography** (Your Town or Region)
- **Search Terms** (Executives, Medical Professionals, Surgeons, Doctors, Lawyers, Accountants, Entrepreneurs, Business Owners, etc.)
- **Income Bracket** (Golf Clubs, Tennis Clubs, Rotary Clubs, Art Galleries, Charities, etc.)

JOHN'S GROUPS

- Kitchener-Waterloo Entrepreneurs
- Kitchener, Waterloo, Cambridge, Guelph Software Quality Group (KWCG QA Group)
- Kitchener-Waterloo Executives
- Rotary Club of Waterloo
- Waterloo Region Small Business Centre

ENGAGEMENT: INCREASING YOUR VISIBILITY

Your primary (1st-degree) network is growing, and you've joined some Groups to enhance your visibility – now it's time to engage.

Engagement comes in many forms on LinkedIn™. It could be as simple as liking an article; writing a status update; or re-posting a video or wealth management-related column. LinkedIn™ can also be another avenue to leverage your compliant blog; post content from your professional website; or disseminate the thought leadership of your firm. The common denominator is that content you post on LinkedIn™ must be relevant, not overtly promotional, and – ideally – frequent enough for you to stay top-of-mind. Here are some guidelines:

DETERMINE TOPICS OF INTEREST TO YOUR AUDIENCE – AND POST THEM WHEN IT'S TIMELY. For example, post tax tips in March/April, or RESP considerations in August/September. It doesn't have to be investment-related – just helpful – so think about your network carefully.

EXPAND THE CONVERSATION. If someone **comments** on your post, engage with them – comment back or **like** their comment. Comments are great ice-breakers and enhance your visibility.

UPDATE CONTENT ON A REGULAR BASIS. Create a schedule. Make a conscious effort to post at least one article per week.

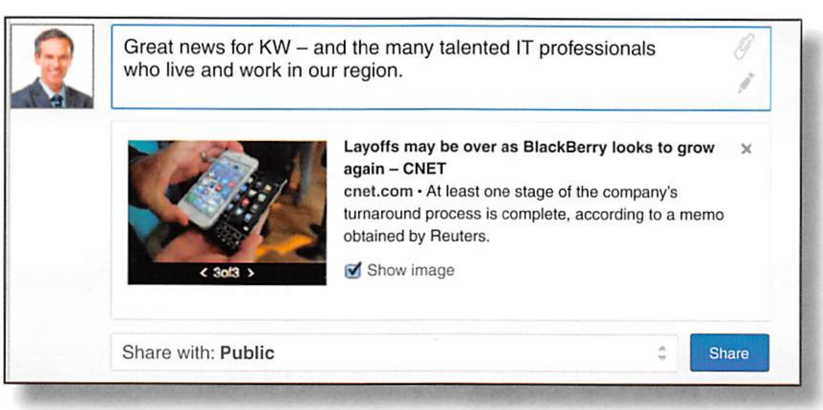
CONNECT! Monitor the **likes** and **comments** on your LinkedIn™ contributions and use them to make new connections.

If you're reposting someone else's article, write an insightful introduction that's helpful to readers. You can also demonstrate your value by commenting on a post with additional information.

STAY LOCAL. Post content that applies to your immediate community. Follow local newspapers, blogs, and major employers – sources of content and connection.

CROSS-PROMOTE. If you have accounts on other social networks, disseminate a newsletter, provide a market commentary, or have a business website, cross-post this content on LinkedIn™.

To post, simply start typing; upload a file; or copy a link in your status field. Here, John shares an article that's relevant to his client base in Kitchener-Waterloo.



PRO TIP

If you read an article that you think is of value to your network, and it has a "share" feature, click the icon provided to post on LinkedIn™. LinkedIn™ will allow you to customize an introduction to the article and post it to a group of your choice, to individual connections, or to your entire network.

ENGAGEMENT: PARTICIPATING IN GROUPS

Many successful Social Advisors post thought-provoking questions, based on real-life situations, to engage others in dialogue within Groups. People love to problem-solve – and you'll create an opportunity for interaction, and a vehicle to showcase your wealth management expertise.

A client is looking for a best-in-class cloud-based solution for his medical practice. Would love to connect him to an Electronic Medical Record (EMR) solutions expert. Have any recommendations?

PRO TIP

Some Groups have **Introduce Yourself** discussion threads. Look for them and post your introduction as a comment – all members of that thread will receive it.

JOINING CONVERSATIONS

Contributing to a running discussion is another way to gain exposure, as LinkedIn™ sends comments via e-mail to those following a discussion, which could be hundreds – or thousands – of people. According to LinkedIn™, **"participants get 4x the number of profile views."**

PROMOTIONS

Within a Group, the **Promotions** tab is where you may post your public engagements, seminars, whitepapers, etc. Some Groups may consider this as advertising, and not allow it. Ensure your Promotions are topical and offer value to the Group.

Before posting a new topic, look for previous discussions that may have gone dormant; posting a comment there may revitalise the thread and engage new people.

PULSE

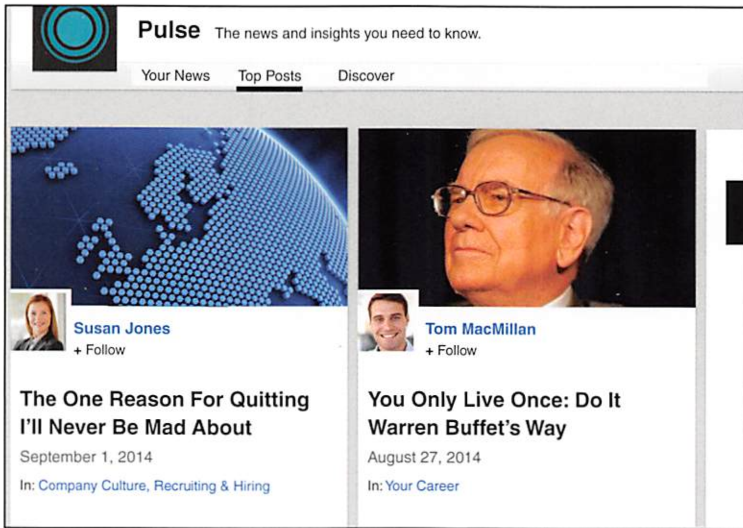
A convenient way to interact with popular, current content is through LinkedIn™ Pulse – an application that enables you to create a personalized news feed that you can curate.

- **Gain** insights from top industry influencers
- **Discover** new content for your topics of interest
- **Share** news and articles from top publishers.

The Pulse feed is catered to you, based on your Interests, Groups and Network. In Pulse, select **Discover** to add recommended reading to your feed, and **Your News** to see it in an aggregated format.

ENGAGEMENT: LIKING AND COMMENTING

PULSE



PRO TIP

Share content from renowned thought leaders and key influencers by sourcing in Pulse, and reposting with a headline that piques the interest of your connections.

The more you interact with content on your newsfeed, the greater your visibility will be. As you're building this recognition, you'll uncover potential leads.

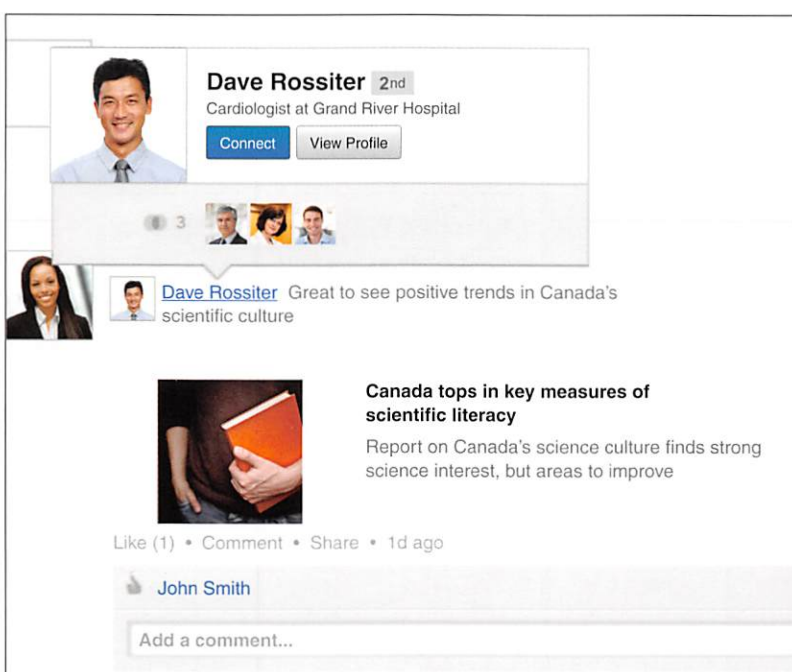
NEWSFEED

Clicking **Like** on a connection's status update allows your network to see the post that you liked and get a sense of what you find relevant, interesting or unique.

Adding a **Comment** on a connection's status update generates conversation across networks, exposing you to new people. This could lead to a dialogue with a new person without having to ask them to be part of your network.

PRO TIP

Cast a wider net. By commenting or liking a post, you gain access to people outside your network who have also commented or liked the same post.

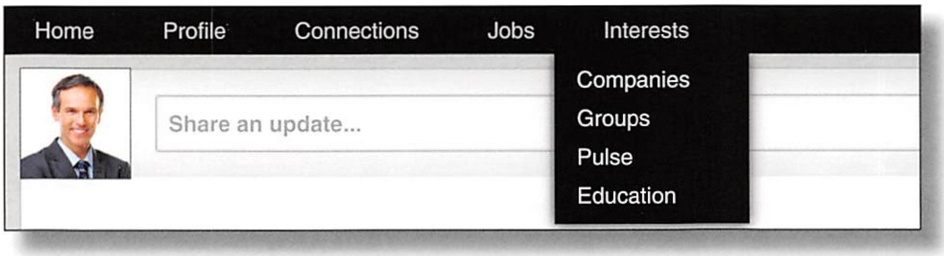


John's connection, Carrie, **liked** Dave's status update. John is not connected with Dave, yet can see information about him and add his own comment to the update, thus engaging with him.

ENGAGEMENT: FOLLOWING COMPANIES

Liking and commenting on a company's status makes you visible to everyone who follows that company, including employees, management and other stakeholders.

To find companies to follow, think about your target market, and the organizations that would be of interest to them. A logical place to start: if you've got existing clients in a company, follow it and engage with their posts to complement your lead-generation efforts.



John **follows** and engages with St. Mary's General Hospital, Grand River Hospital, and BlackBerry, all based in his region, to gain further exposure where he already has a foothold.

MENTION

A largely underutilized feature, Mention allows you to acknowledge individuals or company pages when you post comments on your profile. Just enter @ followed by the name. LinkedIn™ employs autofill type here, so you'll need to ensure that you mention the correct person or company before posting your comment.

ENDORSEMENTS

Endorsing others is a simple, one-click way to recognize your connections' expertise. Simply click a Skill or the + sign beside it. To select multiple skills, select Endorse next to Send A Message. Select from those provided or start typing in a search. You may find that your endorsement opens the door to reciprocity – encouraging others to validate your strengths.

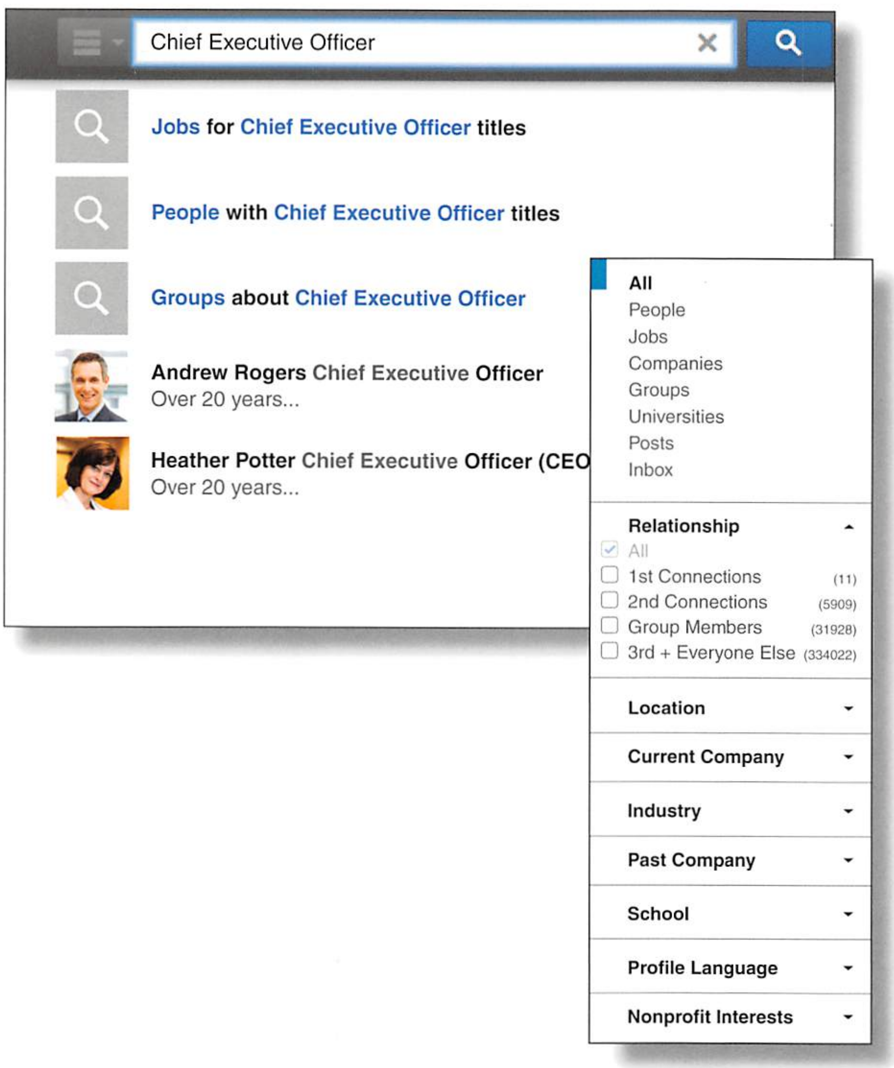
Only accept endorsements from those whom you've actually worked with, and endorse people if you're familiar with their skill set.

PEOPLE SEARCH: YOUR GROWTH STRATEGY CONTINUES

If you've built a trusted LinkedIn™ network, and have started to enhance your visibility through engagement, the next chapter in your growth strategy is to actively seek out unknown prospective clients that fit your criteria by using LinkedIn™'s People Search. Here you can uncover known connections to facilitate an introduction. Consider this a warm lead.

In addition to vetting your contacts' profiles to see if they are connected to those who may fit your target demographic, LinkedIn™'s People Search is an <u>advanced</u> way to find affluent professionals you do not know, but may have a connection to.

BASIC SEARCH: Using the main search bar, you can type in a **profession** to reveal a list of options to choose from, such as related jobs, people, connections, groups and skills. For example, you might choose **dentist** or **surgeon**, a designation like **P.Eng** or **CA**, titles like **CEO** or **CFO**, and keywords like **owner** and **entrepreneur**.



FILTER RESULTS: If you've already started a basic search, you can filter your results by adding criteria in the left-hand navigation. **John might enter "surgeon" in the search bar and then target his search by adding "Kitchener" as a location.**

Click on **ADVANCED** next to the search bar on top of the page.

ADVANCED PEOPLE SEARCH

Advanced People Search will allow you to mine, select and pre-qualify your prospects. Within seconds, you can run searches and find leads based on any of the following parameters:

KEYWORDS: Determine what keywords are particularly relevant to your practice; be specific (e.g., "business owner," "CEO," "doctor," "dentist," "entrepreneur," etc.).

FIRST NAME, LAST NAME: Unless you are searching for a particular individual, leave these fields blank.

TITLE: This field is extremely useful for narrowing down results. Think about your target client and determine what title he/she may have. For example, many Advisors seek out **business owners**. To find them, use titles such as owner, CEO, president, principal, etc.

Other options: head, chief, manager, senior director – or specific careers (e.g., surgeon). You can select "past" to identify, or filter out those who are retired.

> If your search was too narrow and did not generate many results, remove filters, to update dynamically.

PRO TIP

Search for transition signals on profile summaries or headlines, such as "new position," "in transition" and "seeking new opportunities". These individuals may need a Financial Advisor for the first time in their lives.

COMPANY: Consider the companies in your area that you would like to target, such as a major enterprise or a hospital that employs affluent and high-net-worth individuals. You include multiple companies in your search **(Current or Past)** by clicking **Add**. Use **Past** to trace where former employees of an organization have migrated.

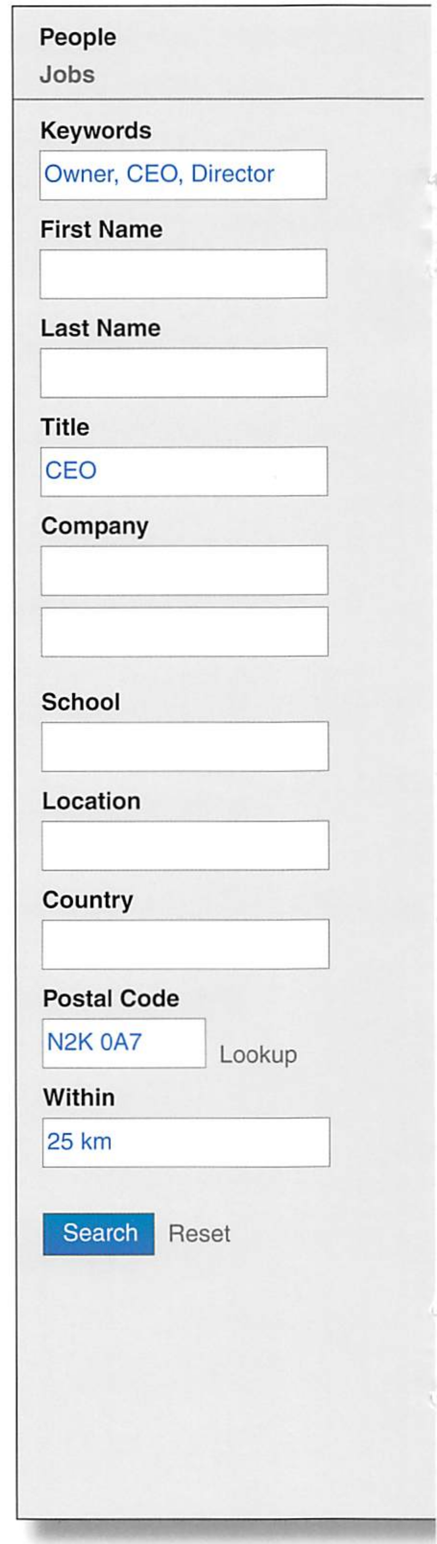
LOCATION FIELDS: Use a specific postal code to narrow results to your service area.

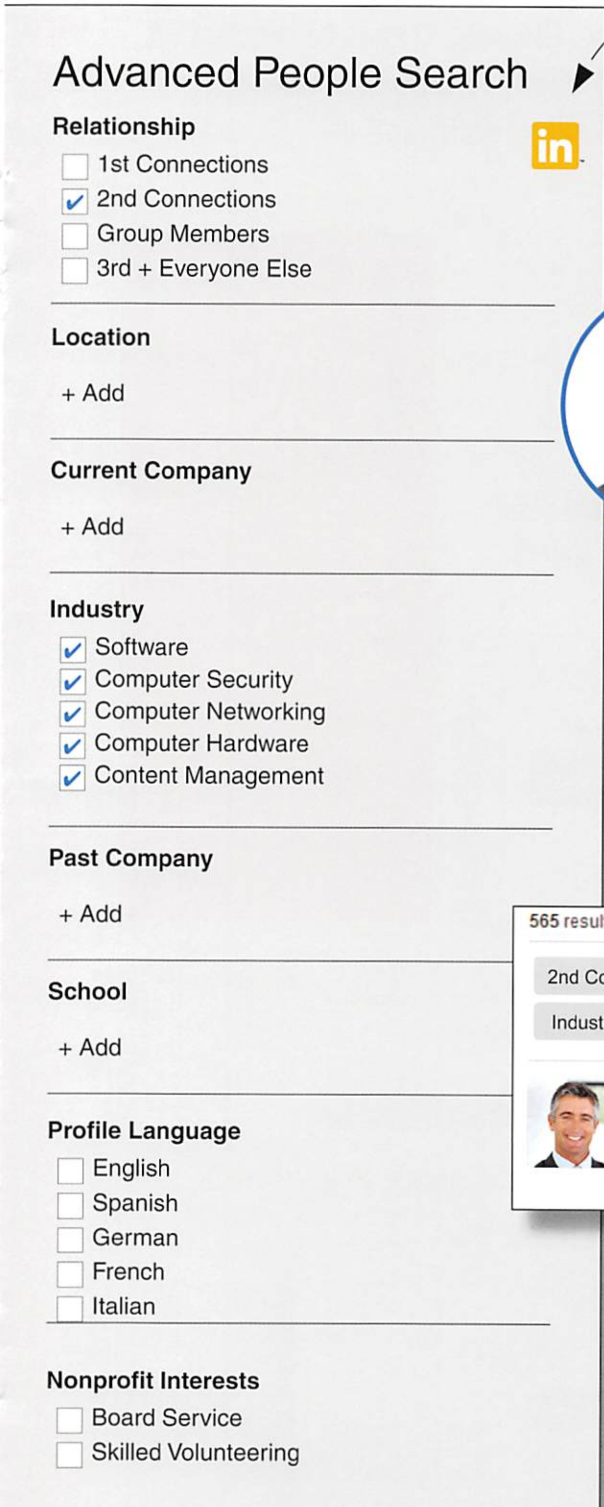
RELATIONSHIP: Since you should already be familiar with your 1st-degree connections and have vetted them for any client opportunities, uncheck "1st Connections." 2nd-degree connections are the best place to start searching for prospective clients, as you have someone in common. On LinkedIn™, 3rd-degree connections will require an introduction, with the exception of Alumni, and fellow Group members, as referenced in this Guide.

INDUSTRY: Consider the significant sectors in your area, or your particular niche, and use this filter for more targeted results. Leave blank to include all.

SCHOOL: Use this criterion to reveal an alumnus that LinkedIn™ will allow you to connect with directly, even if they are NOT in your network.

NONPROFIT INTERESTS: Select Board Service to identify potential affluence – and seniority.

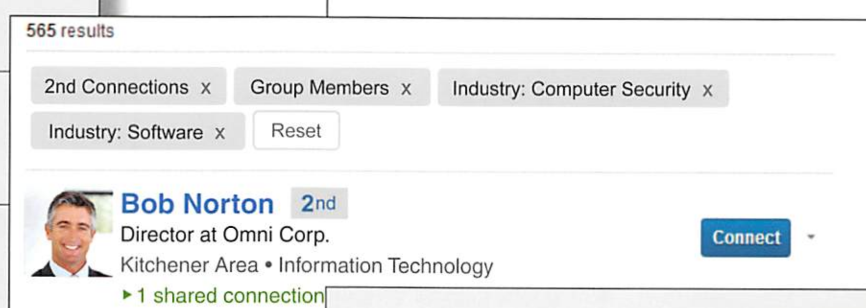


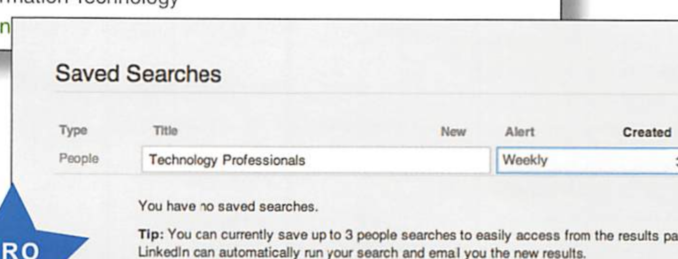


Note: Gold IN icons indicate LinkedIn™ Premium features. For more on this paid service, see the last page of this Guide.

John's practice is located in the high-tech hub of Kitchener-Waterloo, so it's a natural fit to leverage this demographic further to build his book. Similarly, he will seek out LinkedIn™ introductions to the doctors, business owners and associated professionals he's discovered that are in his area through the Advanced People Search, and in the network of a 1st-degree contact.

OTHER TITLES: Chief Information Officer, CFO, Executive Vice President, Senior Vice President – Engineering, etc.





PRO TIP

Select **Save Search** LinkedIn™'s network is constantly evolving – if you save your search, LinkedIn™ will e-mail findings every week.

INTRODUCTIONS TO PROSPECTIVE CLIENTS

John has used the Advanced Search to identify those in his niche – and has discovered that there are possibilities for an introduction based on a connection to his 1st-degree, existing network. The next step is to request an introduction, and then invite each prospective client to join his network – essential to the networking phase of your LinkedIn™ sales and growth strategy.

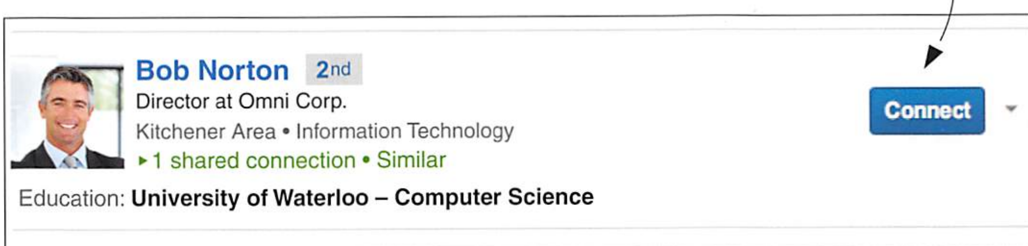
PRO TIP

LinkedIn™ etiquette is to send out an invitation to those you know, or request an introduction to those you do not know, but wish to have in your network.

2nd DEGREE CONNECTIONS: PERSONALIZE YOUR INVITATION

Because you already have a contact in common with your 2nd-degree connections, LinkedIn™ makes it extremely easy to reach out to them. Simply click on the "Connect" button to proceed to the invitation screen. **Remember: it's not only good etiquette to personalize your messages; if you don't, there's no context for the recipient.**

Note! Indiscriminately requesting connections from people who do not know you may be damaging to your growth on LinkedIn™. LinkedIn™ may restrict your account, requiring you to provide the email address of every person you wish to connect with – a detriment to prospecting.



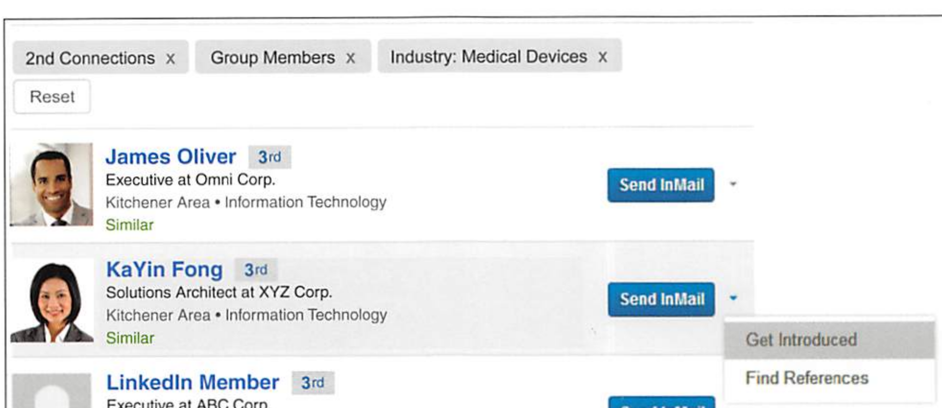
PRO TIP

If you have no connection in common, and you still want to connect, send an invitation request through InMail. This will be akin to cold calling.

3rd DEGREE CONNECTIONS: REQUIRE AN INTRODUCTION

Once you've got your search results, click on the ▼ and select **Get Introduced.**

LinkedIn™ will display a list of your existing connections who can provide an introduction.



INTRODUCTIONS TO PROSPECTIVE CLIENTS

Your request for an introduction should be professional, be brief, and reflect the level of familiarity you have with your 1st-degree connection.

Dear Diane,

I noticed that you're connected to Marg Grayson. Would you be amenable to introducing me? Marg lives in my area, and based on her profile and my service niche, I believe we could build a mutually beneficial business relationship.
I'd be happy to reciprocate if there's anyone in my network you'd like to connect with!

Regards,
John

PRO TIP

For more insight into a Group, or Group Members before you connect, click on the "i" icon at the top right-hand side of the page for more in-depth statistics.

ESTABLISHING A CONNECTION WITH GROUP MEMBERS

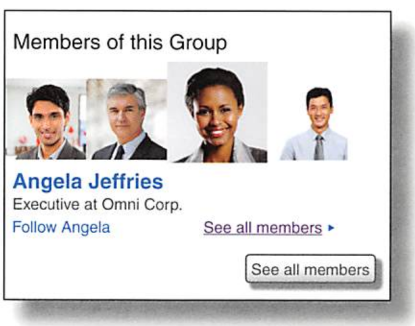
You can connect with other Group members, not just those who post, by sending them a message. The best time to send an invitation to a Group member is after they have commented on your post, or replied to a comment you have made on someone else's post. (See Engagement, page 10.) Always explain why you want to connect, mention your mutual Group interests and explain how your connection would benefit them.

Note! To identify leads, view a full membership list by clicking on "See All Members" in the upper right of the Group profile. Search, and connect with a personal message.

Dear Angela,

I read your comment in the Waterloo IT Executives group, and found your perspective very interesting. In that spirit, I thought I'd reach out and connect. I'd be interested in other insights you may have on changes in KW's IT sector, as it's a niche I service in my wealth management practice.

Yours Truly,
John Smith



WHO'S VIEWED YOUR PROFILE

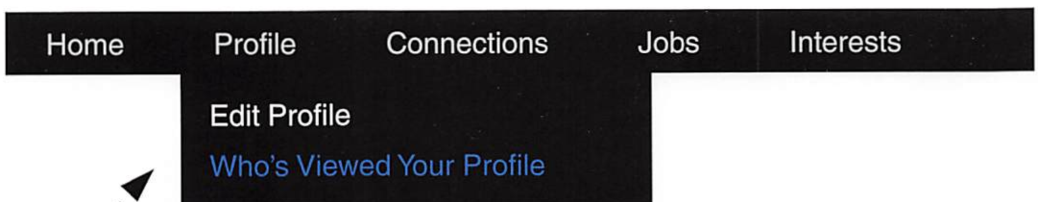
LinkedIn™ provides demographic information on the individuals who have accessed your profile in the form of dashboards – analytics that show you views of your profile for the past 90 days.

For Advisors, this means a better understanding of whether your profile is reaching members of your target audience, what needs to be improved, and what days you saw traffic spikes – indicating if your postings, likes, and comments were a catalyst to viewer interest.

PRO TIP

If you send out a newsletter, market summary, or post content to your business website, include your LinkedIn™ "vanity URL" and see if there's an associated spike in your LinkedIn™ traffic on the day you disseminate. For profile enhancements, including vanity URL, ask your BMO Global Asset Management Representative for *Becoming A Social Advisor.*

Click on **"Who's Viewed Your Profile"** under the profile tab on your LinkedIn™ home page.



Note: The free version of LinkedIn™ only allows you to see the last **5** visitors, so check this page frequently.

Make sure your privacy settings under **Select What Others See When They've Viewed Your Profile** is set to **Your Name and Headline**. (See Privacy, page 3.)

CITIES

If your **viewers** are outside your service area, add more emphasis to your city/town/region on your profile, in your Summary and in the Groups you follow.

John noticed that a viewer of his profile – a business owner – supports a Waterloo children's soccer league. One of his 1st-degree connections has a daughter in this league, so John will send him a request for introduction based on this common thread.

PRO TIP

Should you connect with someone who's viewed your profile without an introduction, personalize your invitation, as you would with any connection. Chances are they'll be receptive, since there's already a demonstrated interest in you.

WHO'S VIEWED YOUR PROFILE

INDUSTRIES AND COMPANIES

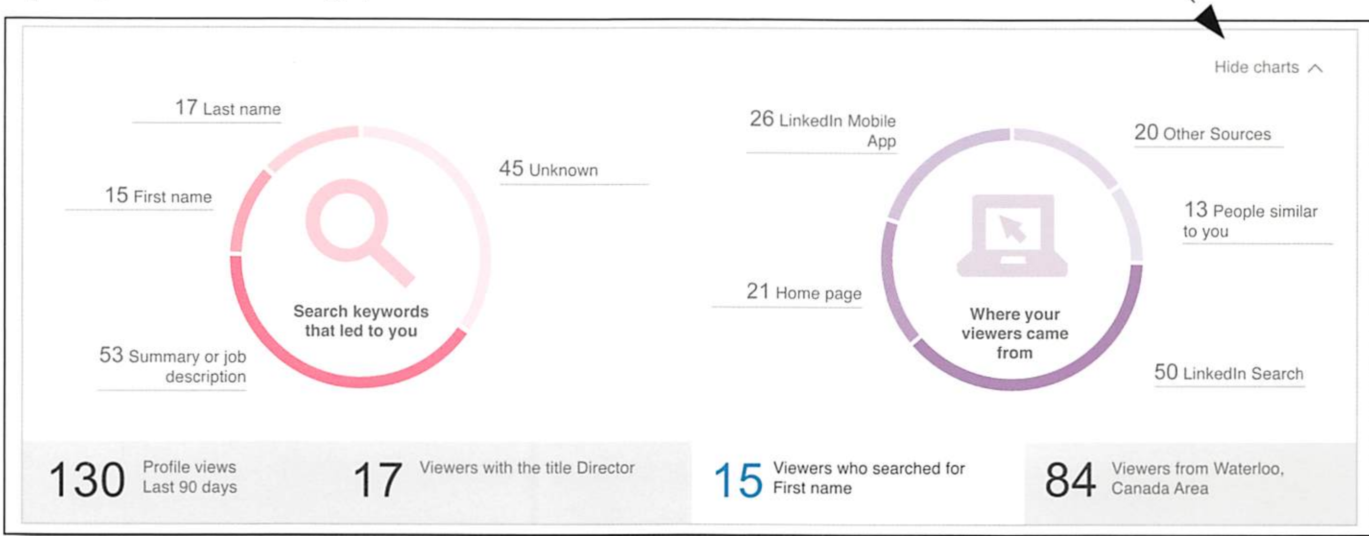
Are members of your target industries viewing your profile? Other companies will give you more insight. If your niche isn't following you, consider changing your profile to better reflect your expertise – and join more targeted Groups.

PRO TIP

If you're connected to competitors, those viewing your profile may be "led"to other investment professionals. Ideally, you want to be connected to those that can help you partner, and elevate your practice.

Very few people in the high-tech sector have viewed John's profile. He will use that information to enhance his Summary with relevant keywords, by following technology Groups and specific companies, and by engaging with content that reflects his niche.

Explore your viewers' demographics with **"Who's Viewed Your Profile"** charts.



"What your viewers do" will help you see if you're targeting your ideal professions – and professionals.

As an Advisor, you can use this information to gauge the effectiveness of the rest of your strategy. For example, are viewers finding you through Group engagement? After viewing someone in your network? Through a posting you made?

Search Keywords can help you identify if your profile is targeted to search terms people use to find an Advisor, e.g., "Financial Advisor," "Investment Advisor," "Wealth Management," "Financial Planning," "Retirement Planning," "Estate Planning," etc.

YOUR SOCIAL ADVISOR CHECKLIST

As part of your sales and growth strategy, commit time each week to leverage LinkedIn™ to its full potential to network; position yourself as an expert; connect with clients; and seek out introductions to high-quality prospects.

365x

DAILY

- Participate in group discussions
- Check your newsfeed; **like** and **comment** on your connections' posts
- Repost any timely, valuable content with a brief introduction

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52x

WEEKLY

- Connect with several new people
- Aim to post articles or insights
- Engage and interact with profiles of your most valuable clients

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12x

MONTHLY

- Run a saved search for your target prospects
- Search and follow new Groups or Companies
- Update your profile to keep it fresh and current

Ensure that you follow your firm's Social Media Policy, and applicable regulatory guidelines, when using LinkedIn™.

Best time to post for engagement: Tuesdays 10-11am*

Best time to post "shares:" 10am and 2pm*

"It takes 20 posts to reach 60% of your network"*

*Source: LinkedIn™.

The Ultimate Goal of BUSINESS BUILDING on LinkedIn™: Taking Your Relationships Offline!

With our first Guide, you created a winning profile – and now you've begun to build your brand by establishing – and growing – your network, including prospective clients. What's the logical next step? Cultivating your leads **offline**:

- Monitor local Group discussions for event or meeting announcements. Invite your fellow Group member contacts to attend.
- If you – or your branch office – is hosting an event (e.g., with a keynote speaker of interest to your affluent clientele), invite select LinkedIn™ connections to the function.
- Use LinkedIn™ messenger, notes and reminders to stay on top of the happenings in your clients' offline activities.

LINKEDIN™ PREMIUM

Both **Business Plus** and **Sales Navigator** plans allow for enhanced contact, filters, search and lead generation. **If you're considering paying for a Premium account, LinkedIn™ allows you to try it for a month free-of-charge.**

AT BMO GLOBAL ASSET MANAGEMENT, our commitment to help you build your business extends beyond a breadth of outcome-oriented investment solutions and best-in-class service, to innovative practice management ideas designed to differentiate you – like our Advisor LinkedIn™ program.

ADDITIONAL RESOURCES

Become A Social Advisor LinkedIn™ Guide	Ask your BMO Global Asset Management Regional Representative for details
LinkedIn™ Help Centre	help.linkedin.com (pose a question)
LinkedIn™ Pulse (News and Insights)	linkedin.com (under "Interests" at the top of your profile)
Official LinkedIn™ Blog	blog.linkedin.com
LinkedIn™ Practice Management Articles	bmogamadvisor.com (our monthly *Insights* e-Newsletter)
LinkedIn™ Apps	linkedin.com/mobile (an overview of the LinkedIn™ application suite for mobile devices)

BMO Global Asset Management