

Get LinkedIn to New Business

Together we'll go far



Agenda

Communications Evolve

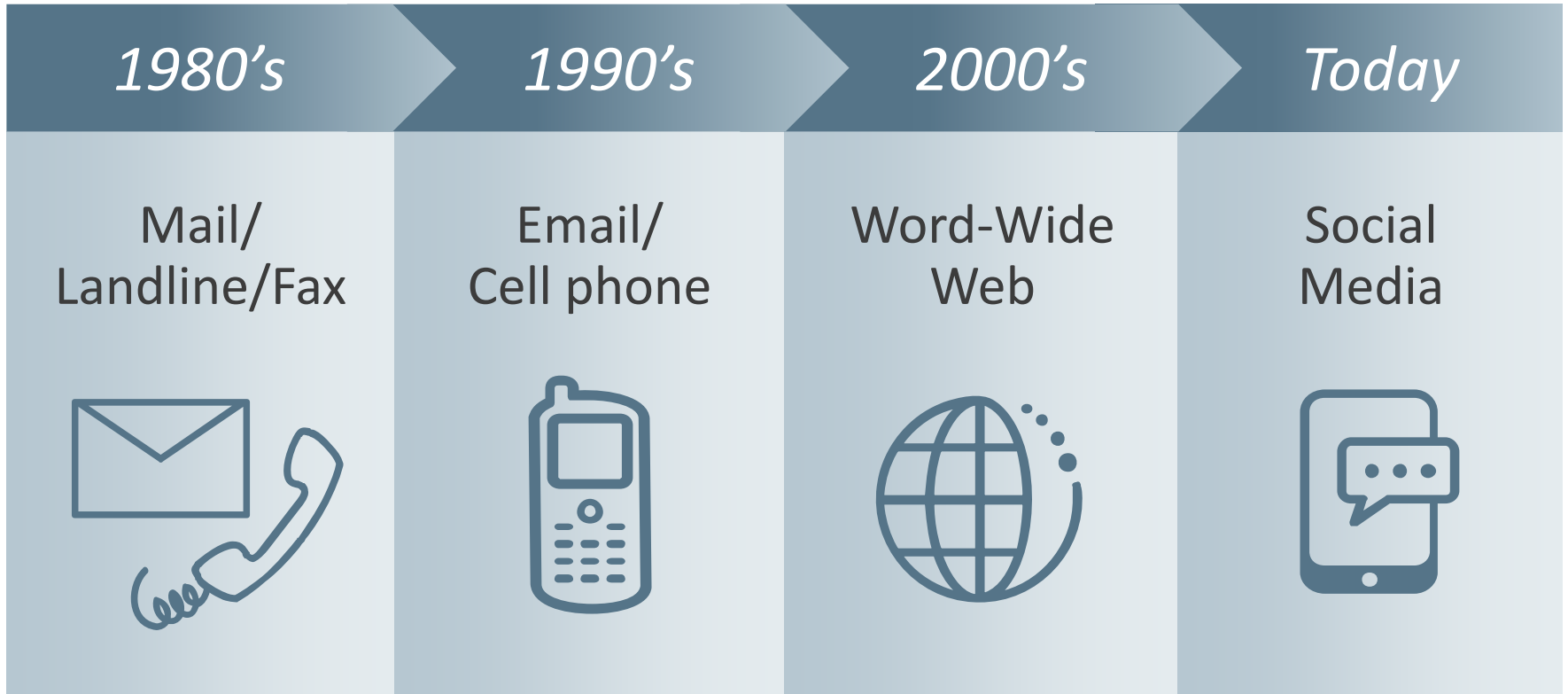
LinkedIn—*What's in it for you*

Get Connected

Appendix—*Just the beginning*

Communications Evolve

How We Communicate Has Evolved



Social Media Has Evolved



2004 → **1,000,000** users

2014 → **1,200,000,000** users



2006 → **5** users

2014 → **250,000,000** users

LinkedIn Has Evolved



2004

11,000 users

They DID:

- » *Search for jobs*
- » *Search for job candidates*

2014

300,000,000 users

They DO:

- » *Prospecting*
- » *Business intelligence*
- » *Brand building*
- » *Introductions*

LinkedIn— *What's in it for you*

LinkedIn—*What's in it for you*

1 Build Your
Book of Business

2 Broaden Your Reach

3 Make a Good
First Impression

4 Source of Market
Intelligence

LinkedIn—*What's in it for you*

1 Build Your Book of Business

LinkedIn is a prospecting and lead generating tool.

2 Broaden Your Reach

*A Morgan Stanley Financial Advisor used LinkedIn to land a **\$70M account***

3 Make a Good First Impression

*A Wells Fargo Advisors Financial Advisor used a connection on LinkedIn to land a **\$2.5M account***

4 Source of Market Intelligence

Sources: Business Insider, Sept. 3, 2013; Wells Fargo Advisors Marketing.

LinkedIn—*What's in it for you*

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LinkedIn attracts HNW individuals: 60% with investable assets between \$1 million and \$5 million and 37% over \$5 million are active on LinkedIn.

*COIs have strong presence: Approximately **400,000 CPAs** and **1.2 million attorneys** are on LinkedIn*

Sources: LinkedIn/Cogent Research, May 2012; LinkedIn Marketing Solutions, FTI Consulting, 2012. [2014 data coming, expecting significant increases]

LinkedIn—*What's in it for you*

1 Build Your Book of Business

Your LinkedIn profile is most often what a prospect or client will first see when they search online.

2 Broaden Your Reach

With a complete LinkedIn profile, you're more likely to rank higher in organic searches for wealth managers.

3 Make a Good First Impression

*1st and 2nd positions on the first page get **more than 50% of the clicks** in Google searches*

4 Source of Market Intelligence

Source: Forbes, Nov. 11, 2013

LinkedIn—*What's in it for you*

1 Build Your Book of Business

Learn in real time about developments in the lives of your prospects and clients.

2 Broaden Your Reach

Stay abreast of what your competitors are doing.

3 Make a Good First Impression

Prepare for an important meeting by researching your prospect's profile.

4 Source of Market Intelligence

Don't Get Left Behind

Your colleagues and competitors are already
sourcing new business through **LinkedIn**

*“LinkedIn has become a **critical networking tool** for me the last couple of years. I’ve made connections that have **led directly to new business.**”*

Christian Romeiser
Wealth Advisor, Charlotte, NC

*“The first thing many of my prospects do is “google” **my name**. What very likely comes up first is my LinkedIn profile. It’s important that I put my best foot forward by having a **complete profile**; one that makes them want to connect with me.”*

Jim Lilley
Wealth Advisor, Charlotte, NC

Don't Get Left Behind

Your colleagues and competitors are already
sourcing new business through **LinkedIn**

*“Morgan Stanley has embraced...LinkedIn as a way for its advisors... to **win more business**”*

The Wall Street Journal
July 1, 2014

*“Financial Advisors **build business** with LinkedIn”*

Forbes
February 28, 2014

Get Connected

Create a Compelling LinkedIn Profile

- ✓ Incorporate **key words** throughout
- ✓ Tell your **professional story** in the **Summary**
- ✓ Explain **how** and with **whom you work** in **Experience**
- ✓ Convey your **strengths** in **Skills & Endorsements**
- ✓ Share who you are **outside the office**
- ✓ Use a **professional photo** and the **Wells Fargo logo**
- ✓ Get your profile **reviewed by Compliance**
- ✓ Visit **WealthNet » Social Media** to begin the journey

Need Help?

Marketing questions to
Marisa.Ajdelman@wellsfargo.com

Compliance questions to
LinkedInReview@wellsfargo.com

Questions?

Appendix—*Just the beginning*

- LinkedIn Enablement Journey
- The Plan
- Timeline

LinkedIn Enablement Journey

Today*

	WAs	PBs
Total	196	409
Profiles	174	309
Complete/ on brand	28	58
Approved	26	Pending

What they can do

- » *Connect with prospects and clients*
- » *Market intelligence*

*As of August 12, 2014

Future

ALL WAs and PBs with profiles
ALL profiles complete, on-brand
And compliance approved

What they can do

- » *Engage dynamically with prospects and clients through a middleware solution*
- » *Post Compliance-approved content*

The Plan

Revamp processes and educational materials to more effectively engage target roles

Update intranet Social Media page to host educational and compliance materials

Educate client facing team members about LinkedIn's business potential, the importance of applying best marketing practices in profiles, and adhering to compliance guidelines

Partner with Compliance to define a streamlined LinkedIn onboarding, profile review, and approval processes, and create supporting materials

Deepen partnerships with key stakeholders and catalysts (e.g. leadership)

Assess effectiveness of processes, educational materials, and outreach efforts; adjust approach as needed

Timeline

