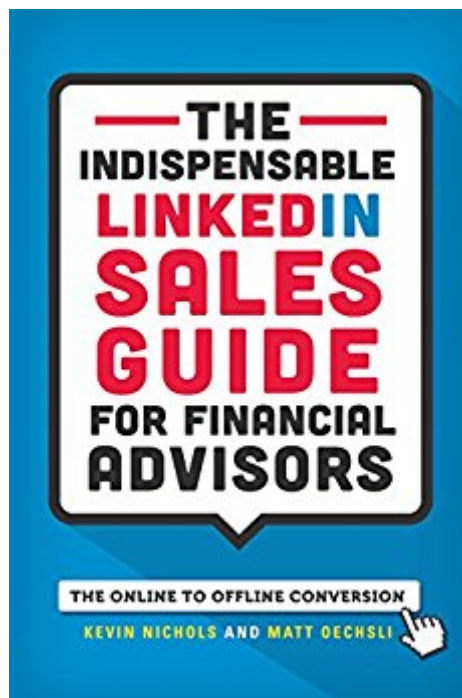


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# The Indispensable LinkedIn Sales Guide For Financial Advisors: Mastering The Online To Offline Conversion



## Synopsis

Would you like to acquire more affluent clients with the help of LinkedIn? If so, this book is for you. When used properly, LinkedIn is a tool that has enabled a small cadre of financial advisors, referred to throughout the book as Influencers, to make social selling a core part of your business development efforts. The Indispensable LinkedIn Sales Guide for Financial Advisors is a step-by-step guide that can transform a LinkedIn novice into a LinkedIn master, while at the same time help a LinkedIn master take their social selling skills to the next level. By combining research from three separate studies on affluent investors, elite financial advisors, and social media in the financial services industry (labeled as the Trifecta of Research), the authors create a financial advisor roadmap on how to use LinkedIn to help acquire more affluent clients. For instance, you will learn that the personal introduction is the #1 marketing tactic to which today's affluent respond and learn how to orchestrate these types of introductions using LinkedIn. The authors refer to this as the Online to Offline Conversion or the O-2-O Conversion™. They will teach you financial advisor tested techniques on how to engage in advanced searches, join and form groups, properly engage with your connections, and brand yourself as a first class professional. Each chapter focuses on an area that is important to mastering LinkedIn social selling, and goes into granular how-to detail. For instance, the chapter on Advanced Searches covers everything from Finding Business Owners to understanding how to use Boolean Logic, to how to find Money in Motion, and much more. Social media has become an indispensable research tool for Influencers and the technology is only getting better. Welcome aboard our social media journey. The fun has just begun.

## Book Information

File Size: 23878 KB

Print Length: 212 pages

Simultaneous Device Usage: Unlimited

Publisher: Wealth Management Press (December 28, 2014)

Publication Date: December 28, 2014

Sold by: Digital Services LLC

Language: English

ASIN: B00RKO4CS0

Text-to-Speech: Enabled

X-Ray: Not Enabled

Word Wise: Enabled

Lending: Not Enabled

Enhanced Typesetting: Enabled

Best Sellers Rank: #197,878 Paid in Kindle Store (See Top 100 Paid in Kindle Store) #48

inÂ Books > Business & Money > Industries > Financial Services #310 inÂ Kindle Store > Kindle eBooks > Business & Money > Marketing & Sales > Sales & Selling #774 inÂ Books > Business & Money > Marketing & Sales > Sales & Selling

## Customer Reviews

I have been in financial services since 2007 working for a major insurance company, a bank and now a wire. I have read just about every book worth reading regarding financial advisory prospecting. While some may argue that prospecting has gotten harder over the years in ways I think it has gotten easier with the growth of tools such as LinkedIn. I personally use LinkedIn almost every day to grow my pipeline of potential clients. The ideas presented in this book are the best I have read regarding leveraging LinkedIn to build your client base. Some of the scripts and ideas that are shared I utilize on a consistent basis. Many times I read a prospecting book and the ideas are hokey and are essentially worthless. This book is the opposite of that - the ideas and concepts presented you can make part of your daily routine. The methods of prospecting effectively are changing and I believe in order to be on the cutting edge you will want to have LinkedIn as a means to source new prospects. If you agree you should read this book, to my knowledge you won't find a better guide.

As a seasoned (28 year) advisor who has been an early adopter of social media in our industry- I have been craving for a book EXACTLY like this one. The Oechsli group has always been there throughout my career with game changing articles, seminars and forums to help grow my business through creative marketing. If you are serious about the future of your business this book needs to be on your desktop now. (or IPAD or Kindle) As my mentor and friend Gary Vaynerchuk, always says, "In the age of Jetsons you need to act like a Flintstone"- this book will show you how.

I Hate This Book!. It has just unlocked some of the greatest secrets in the industry for using social prospecting and business development that I was trying to keep for myself and now gives them away for a mere pittance of a price. As a seasoned advisor, I worked closely with Kevin Nichols to take our company business to the next level. He has recapped in this Sales Guide all of the components that a hungry advisor needs to be successful as a next generation business

development guru. Lets face it, Cold calling is gone, Seminars are gone, Direct mail is gone. Social media is the next great tool and if you don't get on board, you might just as well hang up your ticker tape.

As someone who is new to this business and very young (25) I can tell you the most difficult aspect of this business is trying to find creative and meaningful ways to reach out to people. Kevin and Matt truly have a gem in this comprehensive guide that details the strategy and use of LinkedIn as a tool to reach out and build meaningful business relationships with people. Whether you're a seasoned FA or a rookie like me there are tools for everyone. I spoke on the phone with Kevin as well, and I can say that he stands behind their product and service and my impression is that he truly is there to help the FA's who seek it. If cold calling or cold mailing isn't working as well as you'd expect or are just interested in an innovative way to build relationships in the 21st century, then do yourself a favor and buy this guide.

This was a great book for learning different strategies on how to prospect using LinkedIn. I have read several books on "social selling", but I felt this is the best book for financial advisors looking to build their book of business. I would recommend this book for any advisor, new to the business or a seasoned veteran.

If you are a financial advisor looking to maximize your networking potential on LinkedIn, then this book is a must read. Kevin and Matt walk you through a process for making the best use of your time on LinkedIn. You especially won't want to miss the 30 minute LinkedIn Routine that shows you exactly what to do on LinkedIn. Put this checklist on your desk, follow it regularly, and engage with your connections like never before. Traditional sales processes are changing and The Indispensable LinkedIn Sales Guide for Financial Advisors will show you step-by-step how to use the world's largest professional social network to position yourself as a knowledge expert to qualified prospects.

I have been in the financial services business for almost 30 years managing money for individuals and institutions. I, like most of you have read many books on sales techniques, positive thinking, motivation, etc. For me, LinkedIn is an incredible tool. I at first was skeptical but have come to learn how powerful a tool it can be. Again, if you are like me, I didn't realize "HOW POWERFULL" a tool it really is. This book allowed me the opportunity to maximize LinkedIn's effectiveness. It will show you

fast and effective ways to connect with people you know and more importantly with people you want to know. If you follow the books simple guidelines, you will grow your contact base exponentially and have the ability to grow your business many more times the purchase price of this book. It's a must have.

This book gives you an actionable strategy on how to use linked in as a sales tool. With anything, there are "tricks" to increase your level of expertise and Kevin goes over a number of these strategies. As a linked in user for years I was surprised to learn that my knowledge of some of the functionality of LinkedIn was limited. He also pointed out some obvious ways to use it which I forgot about, so it was a great refresher. The book is an easy read (finished it on an airplane) and I'll be referring back to it from time to time to increase my skill set.

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