LAURA VIRILI
## EDUCATING ADVISORS ON CLIENT ACQUISITION & RETENTION

LinkedIn Settings

There are default settings on LinkedIn that you may not be aware of – settings you may want to change depending on how it affects you and your activities. Below are core settings associated with your LinkedIn account, what they do and the recommendations in relation to the settings. *Note: if you are on your firms compliant platform you will want to find out what they've chosen as the default settings and how you can change your settings if needed.*

Find Your Settings (for those that are <u>not</u> on a firms platform). Click on the picture of yourself in the upper right hand corner > from the dropdown menu select **Settings & Privacy**
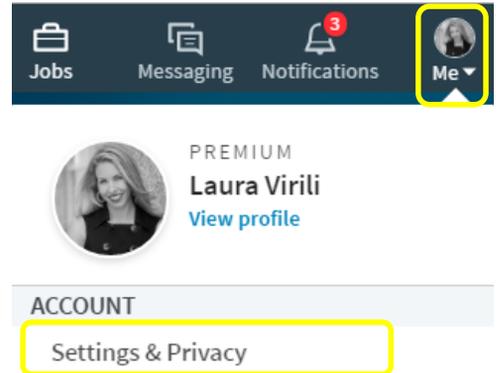
Profile Edits when you make a change to your LinkedIn profile, such as a new picture, new job title, follow companies, join groups, etc. a notification is shared with your network that you have done so.

Recommendation: if you are making a lot of updates to your profile all at once turn this feature off. Otherwise, it is nice to stay top of mind with your network with subtle reminders.

How to: go to Privacy & Settings > Privacy > Profile Privacy > Sharing Profile Edits > No > Save changes
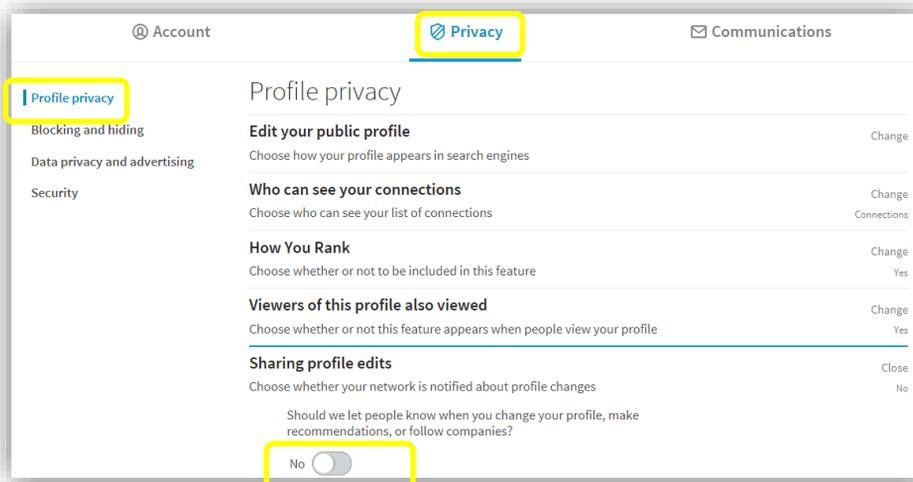
Idea Share!

Check client's and prospects activity feeds on a weekly basis to ensure you haven't missed an important update from them. If they do share an update, use it as an opportunity to interact with them online or off.

LinkedIn Settings

Viewing Profile one of the most used features on LinkedIn is **Who's viewed my profile.** It allows you to see who's been viewing your profile and allows others to see when you have viewed them! You have the ability to be:

1. **Your Name & headline**– selecting the 'Your name & headline' option will allow people to know that you viewed their profile. Users can click through to your profile.
2. **Private profile characteristics** – your name and photo are hidden but job characteristics (industry/title) are shared. Users **cannot** click through to your profile.
3. **Private Mode** – people will **not** know you viewed their profile as none of your details are shared. Users **cannot** click through to your profile.

*Note: if you select Private profile characteristics or Private Mode you will not be able to view **Who's viewed my profile** (you can't have your cake and eat it too) unless you upgrade to premium (as of Dec., 2018)*

Recommendation: If you are using LinkedIn for heavy duty prospecting set to **Private Mode**, you don't want to appear as if you are a stalker. However, if you want a prospect to know you have checked them out, set yourself as Transparent 'Your Name & Headline'.

How to: go to Privacy & Settings > Privacy (from top menu) > Select **Profile viewing options** > it will bring up three options, select **Private Mode** > Save changes
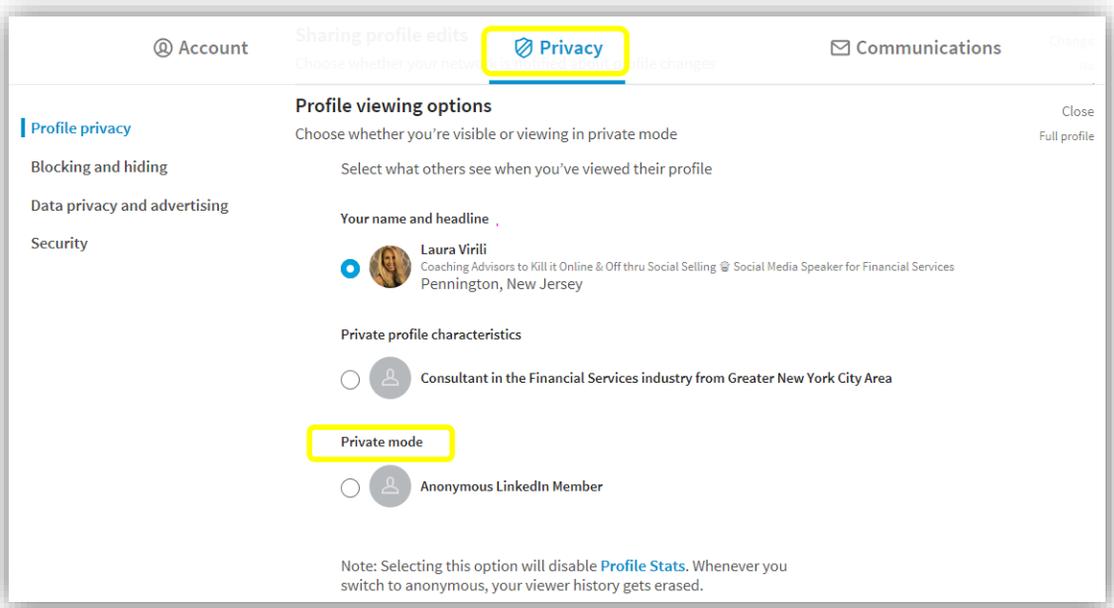
People Also Viewed section of your LinkedIn profile page displays individuals that were viewed by others that also viewed your profile.

Recommendation: Most people who are viewing advisors are also viewing other advisors. If you don't want to promote your competition turn it off.

How to: go to Privacy & Settings > Privacy > **Viewers of this profile also viewed** box > No > Save changes

Viewers of this profile also viewed
Choose whether or not this feature appears when people view your profile

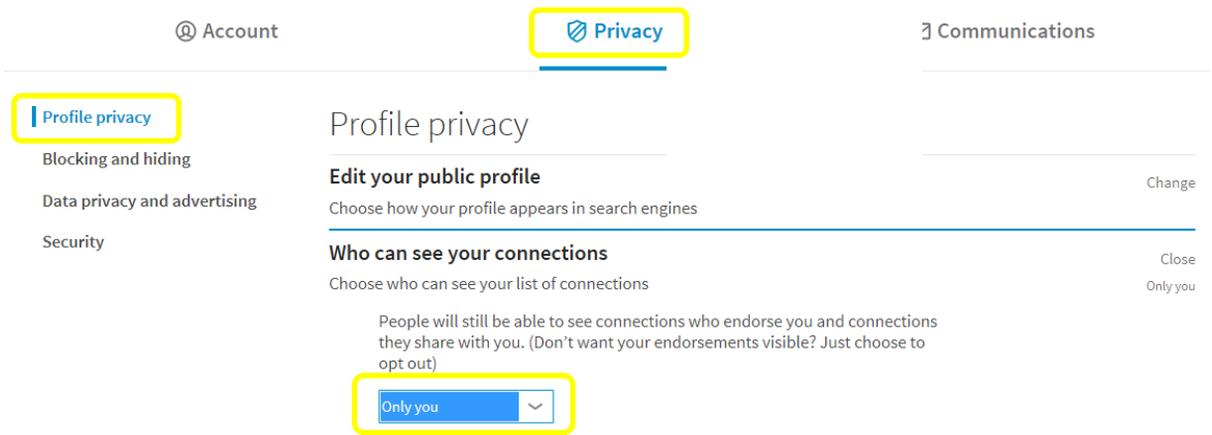Should we display "Viewers of this profile also viewed" box on your Profile page?

No ⬤

LinkedIn Settings

Connections as an advisor you are more than likely connected to your clients, prospects, friends, family, alumni, COIs, professionals and the next generation. Most advisors like to protect the privacy of their network and therefore hide their connections. Currently, the default is to allow others to see your connections.

Recommendation: If you are concerned about privacy of your network then change the setting to 'Only you'. However, if you list share with COIs or allow clients children to look through your connections for introductions upon graduating from college (nice value add!), let's say, then leave them open.

How to: go to Privacy & Settings > Privacy > Select **Who can see your connections** > Only you (from the drop down menu)

⊙ Account	⊘ Privacy	⊐ Communications

| Profile privacy
Blocking and hiding
Data privacy and advertising
Security

Profile privacy

Edit your public profile   Change
Choose how your profile appears in search engines

Who can see your connections   Close
Choose who can see your list of connections   Only you

People will still be able to see connections who endorse you and connections they share with you. (Don't want your endorsements visible? Just choose to opt out)

Only you ▾

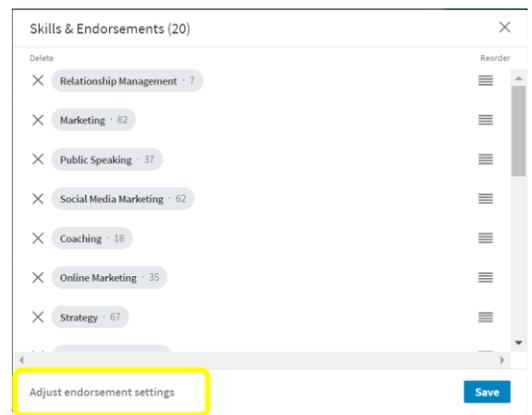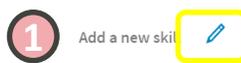Featured Skills & Endorsements

① Add a new skil ✏

Skills & Endorsements section of your LinkedIn profile displays skills you have been endorsed for by others. FINRA/SEC views this as advertising if any of the endorsements are from clients.

Recommendation: Hide all skills & endorsements, you don't want your profile to be under the microscope.

How to: go to Profile > View Profile > Skills & Endorsements section:
1. Click on the pencil icon
2. Click on 'Adjust Endorsement settings'
3. Select 'No' for each
4. Click on the X when complete

Skills & Endorsements (20)   ✕

Delete   Reorder
✕ Relationship Management · 7   ≡
✕ Marketing · 82   ≡
✕ Public Speaking · 37   ≡
✕ Social Media Marketing · 62   ≡
✕ Coaching · 18   ≡
✕ Online Marketing · 35   ≡
✕ Strategy · 67   ≡

② Adjust endorsement settings   **Save**

④ ✕

Endorsements

Manage how you receive and give endorsements

I want to be endorsed   ③ Yes 🔵

Include me in endorsement suggestions to my connections   Yes 🔵

Show me suggestions to endorse my connections   No ⚪
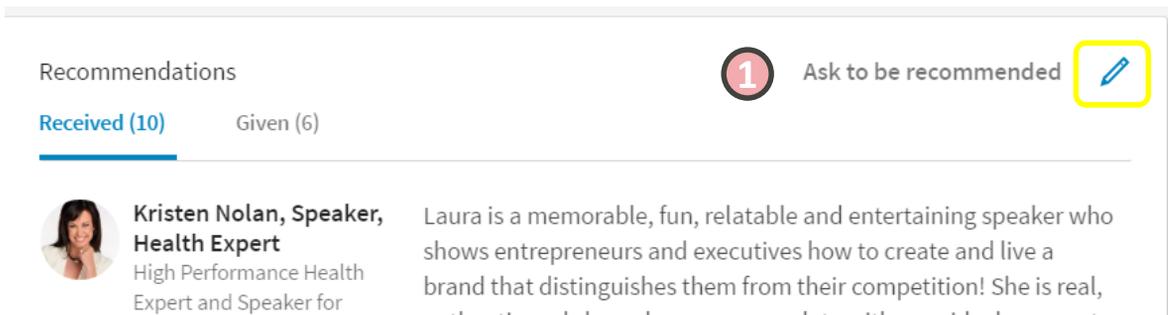
LinkedIn Settings

Recommendations section of your LinkedIn profile page displays recommendations that have been written about you. Again, FINRA/SEC view this as advertising if any of the recommendations are from clients.

Recommendation: Hide all recommendations, you don't want your profile to be under the microscope.

How to: go to Profile > Edit Profile > Recommendations section
1. Click on the pencil
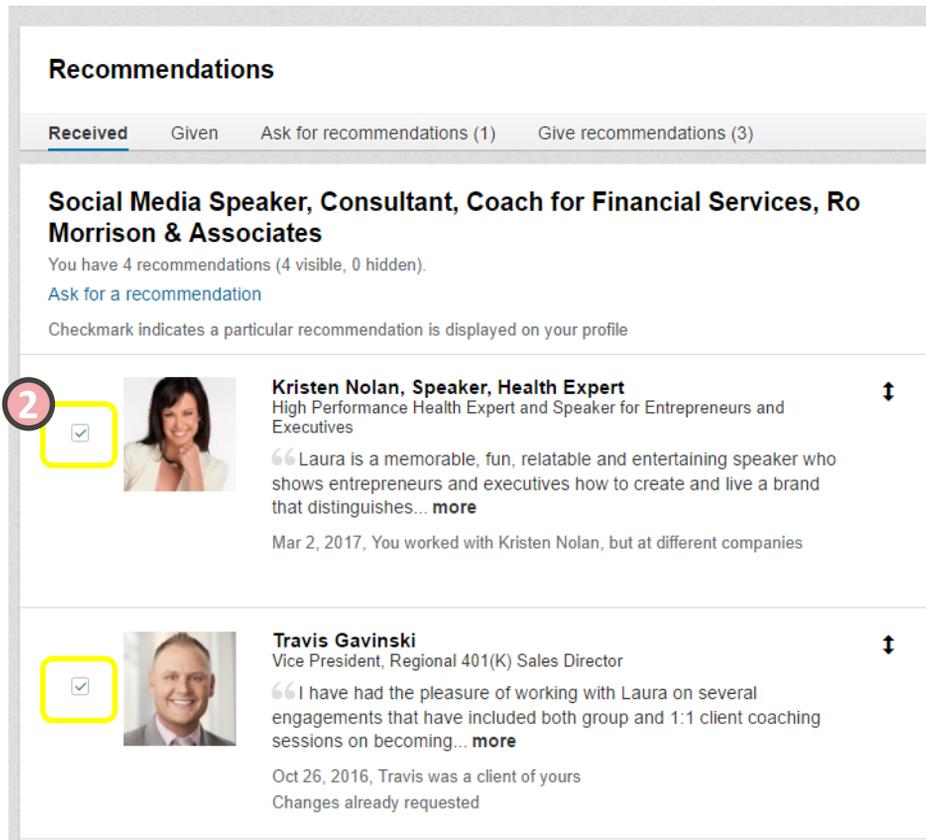2. Un-check the recommendations so they do not appear on your profile