

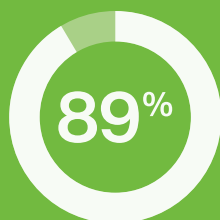


Move Your Business Forward:
Social Media

Build client relationships through social media engagement

Growing your business is a matter of being where your clients are when they want and need the solutions you provide. Even if you aren't on social media, your clients likely are.

In fact, according to a 2020 Putnam Social Advisor Survey¹...



of financial professionals who use social media for business reported gaining new clients attributable to their social networking activity.

We're here to help make it easier to build and maintain client relationships using social media. This guide offers a step-by-step approach to staying in front of your clients consistently to help them get to know you better and trust you more – ultimately leading to more business.

STEP 1: FIND YOUR AUDIENCE (page 1)

- Discover who your audience is and where they are on social media

STEP 2: USE YOUR POSTS TO BUILD RELATIONSHIPS (page 2)

- Plan content your audience will find valuable

STEP 3: PUT YOUR STRATEGY IN MOTION (page 4)

- Write posts in your authentic voice and engage with your audience
- Refine your strategy along the way

Find your audience

The first step is to find your audience, because your greatest insights have no value when offered to the wrong group of people or in the wrong place.

Who is your audience?

Creating and using avatars for your audience makes writing posts easier. Start with your current clients — their ages, genders, education and work status. Learn what you can about their values, worries and goals. It will help you direct your writing in a way that will address their hopes and concerns.

Where is your audience?

Next, find out which social media platform(s) your audience uses, without relying on your assumptions or your own personal favorite. The Pew Research Center compiled usage in 2021 of U.S. adults who use each social media platform listed below. It's just an overview, but it can help guide you to the appropriate platform(s).

Percentage of daily use for specified groups²

	Facebook	Instagram	Linkedin
Total	69%	40%	28%
Men	61%	36%	31%
Women	77%	44%	26%
Ages 18-29	70%	71%	30%
Ages 30-49	77%	48%	36%
Ages 50-64	73%	29%	33%
Ages 65+	50%	13%	11%

Use your posts to build relationships

Social networking can help you establish and deepen connections with your existing and potential clients. Consider the following tips for listening and conversing with them using social media.

Content is king, and videos and pictures add the crowning touch

Give your audience content they can use that makes them feel like they're the heroes in their own stories. Don't worry about giving away free information — the best car repair posts garner more business for the mechanic than do-it-yourselfers who accomplish the task!

Be sure to include visuals in your posts. Content is more engaging and easier to understand with a picture to illustrate.



Engagement goes both ways

When people engage with your content, it's a great idea to listen and respond. Your responses confirm your interest in them and creates a loyal following. As fans like and share your content, you accumulate exposure.

Focus on quality over quantity

Be sure that your social posts offer value. Remember, social marketing is all about building relationships. Be human and honest. Posts developed in your voice that tell a more personal story help your audience get to know you and tend to receive more engagement.

Convert your followers to clients

Your audience expects to hear from you. Three to five content posts followed by a business ask is common.

Compliance matters*

Make sure your content meets the compliance standards of your organization.

- Get compliance pre-reviews for posts focused on risk management or securities-related products.
- Generally, compliance pre-review is not necessary for basic personal finance topics or other content that doesn't get into product specifics.
- If you're not sure which rule applies, get compliance approval.

* Criteria listed for compliance pre-review refers to associated persons of Concourse Financial Group Securities. Individuals registered with other broker-dealers will be subject to the rules of their respective firms.

Put your strategy in motion

Once you have your strategy and content calendar in place, start creating your posts.

Your writing flows more easily when you create multiple posts at the same time, and it frees up the rest of your time for other client interactions. You can use scheduling tools to post them automatically at the right time.

Make sure to be your authentic self and write like you speak, for your audience. You're having a dialog with them, one-to-one, with each post you write.

As your posts gain an audience, pay attention to engagement and feedback, and adjust your strategy as you go. Refining your approach over time will help you gain and deepen the following you want and build your business.



WE'RE HERE FOR YOU

Concourse Financial Group
has everything you need to
move your business forward —
all in one place. Our dedicated
team is ready to help you find
a clear path to reach your
business vision and goals and
support you every step of the
way until you get there.

➔ **Contact us for more**
social media tips
that can help you
grow your business.



Footnotes

¹ Putnam Social Advisor Survey, June 2020 pulse survey: <https://www.putnam.com/advisor/business-building/social-media>

² Social Media Fact Sheet. Pew Research Center, Washington, D.C.
<https://www.pewresearch.org/internet/fact-sheet/social-media/#who-uses-each-social-media-platform>



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