

# LinkedIn Prospecting for Financial Advisor

Extended 5 Month Study



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## Background Information

The financial advisor that is the subject for this case study is in his third year of growing his practice at a major wire house firm. His mission is to grow his practice with business owner clients in and around Orlando, FL. Growth was slow utilizing the firm's canned content and marketing approach.

Social Advisors connected with this advisor via LinkedIn cold outreach. Shortly thereafter, Social Advisors implemented a custom LinkedIn prospecting routine that effectively developed inbound opportunity and meeting requests for this advisor.

Prior to working with Social Advisors, this advisor had a very limited presence on LinkedIn.



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## Our Process



Social Advisors provides a valuable service to financial advisors that are actively prospecting and growing their practice. What we do is not complicated. If you are organized and have time on your hands, you too can executed an effective LinkedIn prospecting campaign for your practice.

We save our clients valuable time and the need to learn a new skill. Our tiered LinkedIn campaigns effectively grow the prospecting list within your niche and create interest in your services. Once we find an interested person, we pass them to you for the introduction and sales conversation.



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## Objectives

### The mission of working with our client is four-fold:



1. Build a list of qualified targeted local business owners in his geographic area

2. Develop the client's LinkedIn network with business owners

3. Continually nurture the network and build rapport with content and direct private messages



4. Create leads specific to the client for direct follow-up via phone or in person





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## Results

Month	Leads	Connections Gained	Connections Requested
January	6	129	417
February	6	141	312
March	30	195	615
April	15	168	477
May	12	81	297
<b>Total</b>	<b>69</b>	<b>714</b>	<b>2118</b>

9.66%

lead rate from  
new connections

33.7%  
acceptance rate



Running a proper campaign takes time. With a series of five pre-approved messages, executing the campaign can take 3-4 weeks.

It is at the end of this initial period of time that the advisor will see the first opportunities trickle into their sales pipeline. From this point, the advisor will see a steady flow of new prospective opportunities.

### Did You Know?



**277%**

LinkedIn is 277% more effective to use for lead generation than other social platforms\*





**Social Advisors can *always* serve up LinkedIn  
Prospecting for your firm.  
Contact Us Today!**

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