

How to build a powerful Financial Services profile on LinkedIn

Why having a strong online presence matters for Financial Services Consultants



#1 in a series of 3

Financial Services have transformed. Have you?

The relationship between finance and technology has never been closer. Software and IT is the no. 1 industry feeding into, and taking talent from, Financial Services. So, consultants need to be thinking digitally.¹

And many consultants say traditional tactics — whether cold calls, mass emails, or lead lists — result in weaker pipelines and fewer deals. As a result, 49% of sellers in the UK, France and Germany anticipate increasing their warm outreach next year.²

So why do consultants lose deals when relying on traditional tactics? Well, consider how B2B purchase decisions often work. On average, they involve nearly seven people³, and 20% of decision-makers change roles every year.⁴ Decision-maker movement can put even the strongest relationships at risk. And without a bigger network of contacts within an organisation, consultants can be left playing catch-up, rushing to find and build relationships with new contacts. The longer it takes a business to learn that their champion has left the company, the more the relationship is at risk.

By losing touch with prospects or existing customers, meaningful connections are lost. In fact, close to 24% of forecasted deals go dark.⁵

With the future of Financial Services so seemingly intertwined with digital technology, it is no surprise that the buyers and decision makers you should be targeting are online. After all, financial services businesses see a 28% increase in deal sizes when using modern selling techniques.⁶

This eBook guides you through 9 key steps which will help you optimise your LinkedIn profile and generate more leads and opportunities for dialogue.



Why having an effective LinkedIn profile matters

Two reasons. First, the opportunity: There are 1 million LinkedIn members based in the UK working in Financial Services, making it the no. 1 industry in the UK on LinkedIn by number of people employed.⁵

Second, LinkedIn is designed with the needs of the modern consultant in mind, using rich features to help make connections with prospective buyers. Financial Services consultants typically see a 13% lift in sourced opportunities pipeline when using LinkedIn Sales Navigator,⁶ **so getting your LinkedIn brand and profile right is key to success.**

Making a strong first impression has never been so important.

Improving your personal brand isn't just to reassure nervous prospects; you'll also attract new ones and it helps to keep your existing ones too.

49%
of buyers research
consultants on LinkedIn⁵

50%
of buyers avoid
consultants with
incomplete profiles⁷

92%
of B2B buyers
will engage with sellers known as
industry thought leaders⁷



The anatomy of a winning Financial Services profile

Professional Photo

Upload a high-quality professional headshot that captures you at your best.

Background Photo

Upload a photo that shows people who you are before they read a single word.

Headline

Write an attention-grabbing headline that compels prospects to learn more about you.

Summary

Use this space to differentiate yourself and showcase skills that speak to your buyer.

Experience

Here's where you demonstrate your Financial Services knowledge and what you can do for customers.

Rich Media

Add relevant content like presentations, infographics and videos that showcase your value.

Skills and Endorsements

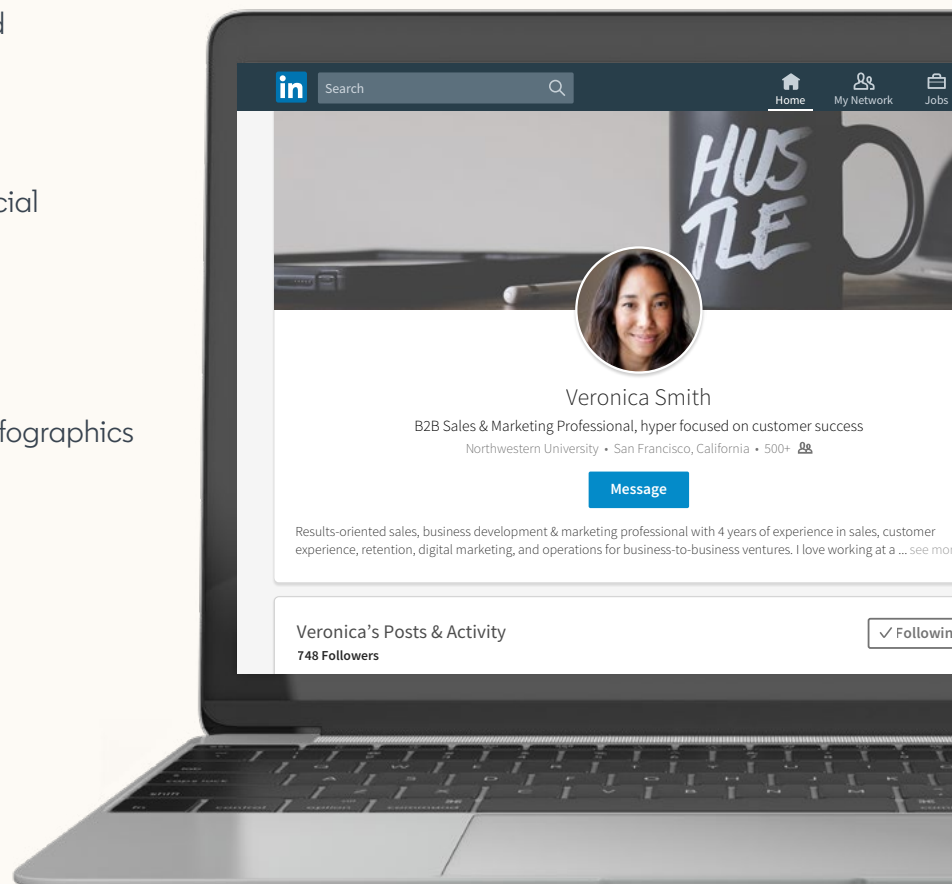
Add relevant skills in this section that are of value to your target audience, these can be endorsed by your network for greater impact.

Custom URL

Pick a custom URL that is just your first or last name or first initial and last name.

Recommendations

Ask for recommendations from satisfied clients because nothing speaks louder than their words.



9 steps to building your professional brand

Step 1: Make your profile visible and easy to find

The first step in getting more profile views is to make sure your profile is visible to Financial Services professionals searching for you.

To change your settings from anonymous to public, from your profile page:

- Click the Me icon at the top of your LinkedIn homepage
- Select Settings & Privacy
- In the Privacy section, click Edit your public profile
- Under Edit Visibility, turn On your profile's public visibility

Personalise the URL of your profile

On the same page, take this opportunity to personalise the URL for your profile. Make your custom URL your first and last name, or first initial and last name, so you're easily found.

A public profile means that people who search for you on LinkedIn can see your full profile information. If your profile is set to private, people will only see a snippet of it.

Pro Tip

Add your LinkedIn URL to your email signature so that potential customers can click to learn more about you.



Step 2: Upload a professional photo

Did you know that around 65% of B2B buyers in Europe told us that an informative LinkedIn profile is an important factor in deciding whether they engage with a seller?⁵

However, it's essential that you convey the right impression with your choice of photo. Think of how you dress and act when you meet a client in real life. Your profile photo should be professional, friendly and representative of the way you'd appear in a face-to-face setting so it leaves a favourable first impression with potential buyers.

It's best to upload a profile photo that is:

- High-resolution and cropped to 400x400 pixels to fit the space
- A close-cropped photo that shows more of your face
- In front of a neutral background or relevant work setting
- Of only you – no friends, children or pets

10 tips for picking the right LinkedIn profile picture

- Pick an authentic photo of how you normally look
- Use a high-resolution image
- Make sure your face takes up at least 60% of the frame
- Be the only person in the picture
- Get someone else to take the picture for you
- Choose the right expression
- Avoid distracting backgrounds
- Wear what you'd wear to work
- Take the photo in soft, natural light
- Use filters wisely



Step 3: Upload a background photo

Along with your profile photo, your background photo is usually the first thing people notice when they look at your LinkedIn profile. A carefully chosen image can tell potential customers who you are, what you do, and what you're about, all before they read a single line of text.

A background photo that highlights your connection to something specific such as banking, can establish credibility depending on your target audience.

It's best to upload a high-quality photo that is:

- Cropped to 4000x4000 pixels to fit the space
- Not covered by your profile photo and headline



Step 4:

Write a compelling headline

The default LinkedIn headline is automatically pulled from your work history, and lists your current position and company. While this information may be useful, your job title alone doesn't tell a very compelling story.

A well-crafted headline works with your profile picture and background image to capture attention – and it's often the difference between someone staying to find out more or clicking away. It pays to see the limited word count as a creative opportunity rather than settling for a standard description of your role. Since it's one of the first parts of your profile that your prospects and customers will see, it needs to get them interested in seeing more.

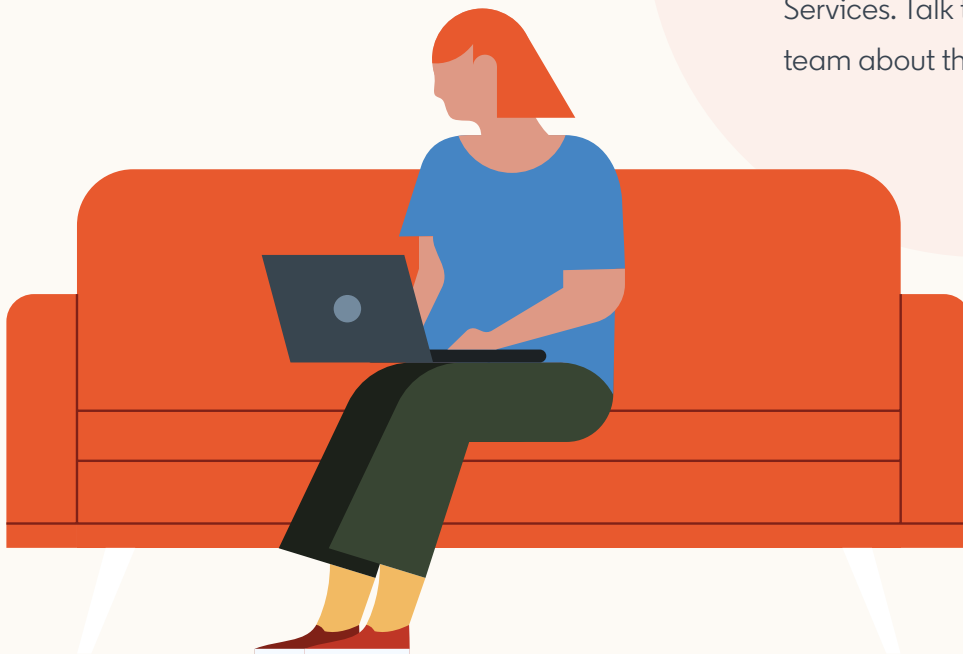
Imagine telling a potential client what you do in terms of how you can provide value for that person and their company, and write from there.

The headline introduces your summary section, which is your space to showcase:

- What you do and who you do it for
- The value you offer buyers
- What differentiates you
- Proof that you can deliver on your promise
- Ways to contact you

Pro Tip

To boost rankings on Google, include words in your summary that are topical in Financial Services. Talk to your marketing team about the trending keywords.



Step 5:

Include a personal summary

Your summary is the place where you can put your value on full display. A common mistake is to concentrate on your achievements, rather than the value you can add for prospects or existing customers. Use this space to differentiate yourself from other consultants and showcase your unique skills.

Think about this as your “30-sec pitch”. Focus on what you do, how you help your customers, and the best way to get in touch (your call to action).

Write in the first person, avoid bullet points, and make the skills and experience you talk about directly relevant to your current role. Most importantly, write with the customer in mind.

For example, “I close million-dollar deals” is good for a résumé, but “I save clients millions of dollars” is better if you’re not in the job market.

Follow this structure to turn your summary from a simple résumé into a reputation-building asset:

Passion

A sentence about why you’re passionate about Financial Services, and what that means for customers.

Background

One or two sentences summing up your career to date.

Company

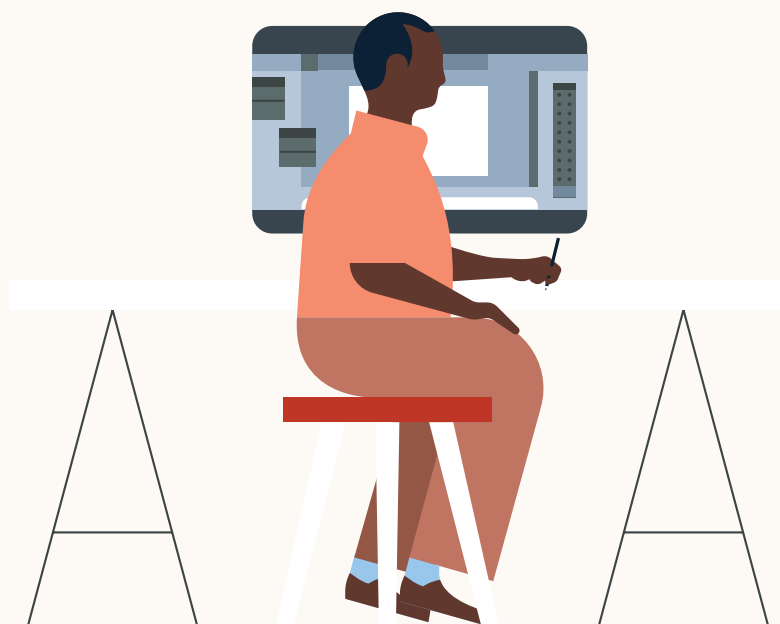
One or two paragraphs about what solutions you offer, and how they’ve solved industry or customer problems in the past.

Call to Action

Contact details and best channels to get in touch – the same things that you’d include on your business card.

Pro Tip

Your writing should be professional, but that doesn’t mean it has to be boring. Let your passion shine through — and if a little gentle humour or irreverence fits your personality, go for it.



Step 6:

Add your work experience

As with the summary, use the Experience section to demonstrate what you can do for customers. There's a tendency to think of work experience in résumé terms, but you're not out to impress a potential employer: it's a good idea to keep your work history relevant to the solutions you have provided for clients.

The key is to balance your Financial Services expertise with your personality so your profile is distinct from other consultants. Possible ways you can convey this include describing how you:

- Have helped multiple customers achieve a significant business goal
- Help others come together to solve tough problems
- Call upon a trusted team and process to assist with the entire buyer experience
- Remain involved with buyers at every stage – even after the purchase
- Spend time when you're not helping buyers, including charitable organisations you support

Try scheduling a monthly or bi-monthly reminder to re-evaluate your headline and summary as even small changes can impact your lead generation efforts.

Pro Tip

Ditch work history that isn't part of your professional career. Unless summers as a lifeguard or working at a theatre helped shape you into the Financial Services Consultant you are today, it's best to leave them off your work experience.



Step 7:

Add rich media

An effective way to attract attention is by adding multimedia content to your profile, such as links to a portfolio, videos, presentations, or infographics. You can add almost any media element to your profile summary. Before you do, take a few minutes to think strategically about what you'd like to accomplish with the additions, and how your summary text and rich media might complement one another.

The following are two areas to which you can add rich media:

- Enhance your Summary with awareness-type content: C-level interviews about your company, videos dealing with Financial Services industry issues, or campaign microsites.
- Support your Experience with greater detail about specific solutions, including presentations or even videos where you directly address customers, help them overcome challenges and achieve their goals

You should share these assets in your feed, as well as your summary.

2 and 5

Limit yourself to around five pieces of media content for your summary and two pieces of media content for your experience.

Make it a habit to review content in these sections every two months in case there is new and relevant content to be added.

Pro Tip

Source content from your marketing team, then use your ongoing conversations with customers to add assets that will resonate.

Step 8: Skills & Endorsements

Including specific skills on your LinkedIn profile is a great way to showcase your abilities to potential buyers.

You can add a maximum of 50 skills to your profile. They're a simple and effective way of building your professional brand and engaging your network.

Once you've added a skill to your profile, your skills can be validated by 1st-degree connections to reinforce their weighting.

From here you can also take a skills assessment, an online test that enables you to demonstrate the level of your skills to your audience, and display a Verified Skills badge on your profile. Displaying the results of your skills assessments is entirely voluntary, and you can retake the tests as often as you like before showing that you've passed.



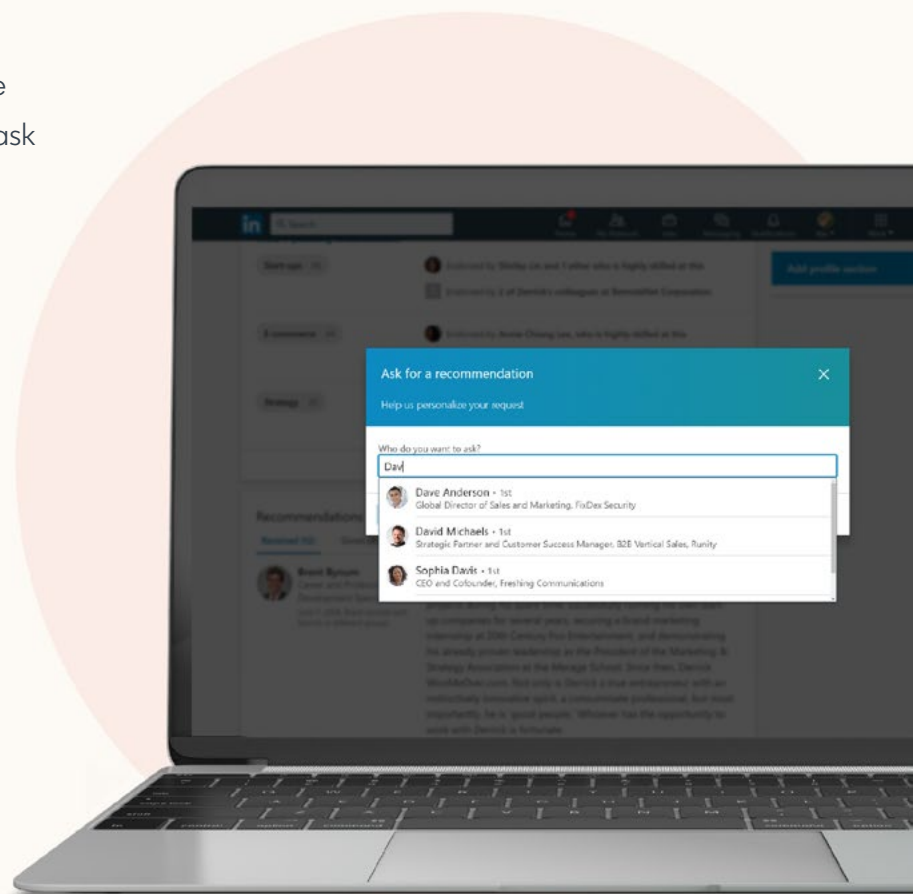
Step 9: Solicit recommendations

To support what you say about yourself, ask for recommendations and endorsements from satisfied clients. Remember to give to get. In other words, offer to provide recommendations to others before soliciting recommendations from them.

When it is time to request a recommendation, from your profile page:

- Click the Me icon at the top of your LinkedIn homepage
- Select your profile by clicking your picture or name
- Scroll down to the Recommendations section and click Ask for a recommendation
- In the Who do you want to ask? field, type the name of the connection you'd like to ask for a recommendation
- Select the name from the dropdown that appears
- Fill out the Relationship and Position at the time fields of the recommendations pop-up window, and click Next
- You can change the text in the message field, and then click Send

As you ask for recommendations, write a personalised message to accompany your request. A solid recommendation describes how you collaborated and includes specific examples of how the client benefited by working with you, so don't be shy about asking your client to include those in the write-up.



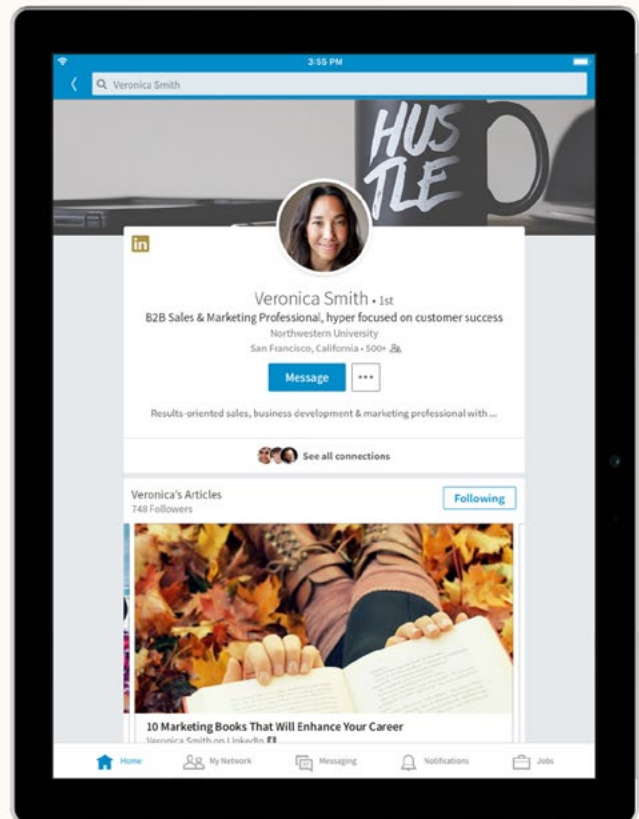
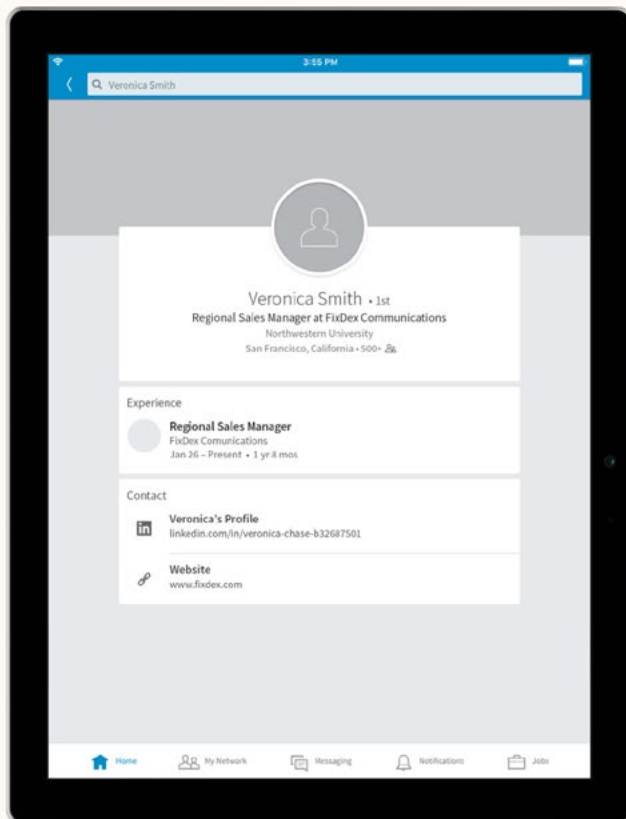
Conclusion: Breaking it down

Take a look at these two profiles of the same hypothetical person.

The right-hand profile of Veronica is obviously a lot more engaging. She's using a professional and warm photo, and her headline clearly defines the value she brings to clients. Her summary further elaborates on the skills and personality she brings to her role and customers, even highlighting specific benefits like time-to-market and media articles that demonstrate her expertise.

Veronica could take her profile even further, and support her summary with even greater detail by filling out other sections in her profile, like volunteer experience and projects.

On average, financial services companies see 50% of revenue influenced by LinkedIn Sales Navigator.⁶ It's an essential platform – over a million financial service professionals in the UK have a LinkedIn profile. By following the nine steps in this eBook, you can raise your profile, generate more leads, and increase your sales pipeline.



About us

Unlock the power of LinkedIn, the professional network of more than 690 million members and 50 million businesses. LinkedIn Sales Navigator makes it simple to establish and grow relationships with prospects and customers.

Designed for sales professionals, LinkedIn Sales Navigator combines LinkedIn's network data, relevant news sources, and your accounts, leads, and preferences to produce customised recommendations and insights.

With LinkedIn Sales Navigator, you can focus on the right people and companies, stay up to date on what's happening with your accounts, and build trust with your prospects and customers.

Looking to get LinkedIn Sales Navigator for your team? [Request a free demo.](#)



¹ LinkedIn Economic Graph: Industry Report Finance

² LinkedIn State of Sales Report 2020

³ CEB Research

⁴ Internal LinkedIn Data

⁵ [The Ultimate Guide to Eliminating Blindspots from Your Sales Pipeline](#)

⁶ Winning the Finance Game with LinkedIn Sales Navigator, LinkedIn 2020

⁷ LinkedIn 2020, "Read Me to Create an Effective Sales Profile"