



Sales Connect

New York 2016

Why Start a Social Media Program?

Let me tell you a story...



John Hauryluke

AVP of Distribution Technology, OppenheimerFunds



“

The mindset today in business is about being fluid. You need to change or get ready to be left behind.

John Hauryluke

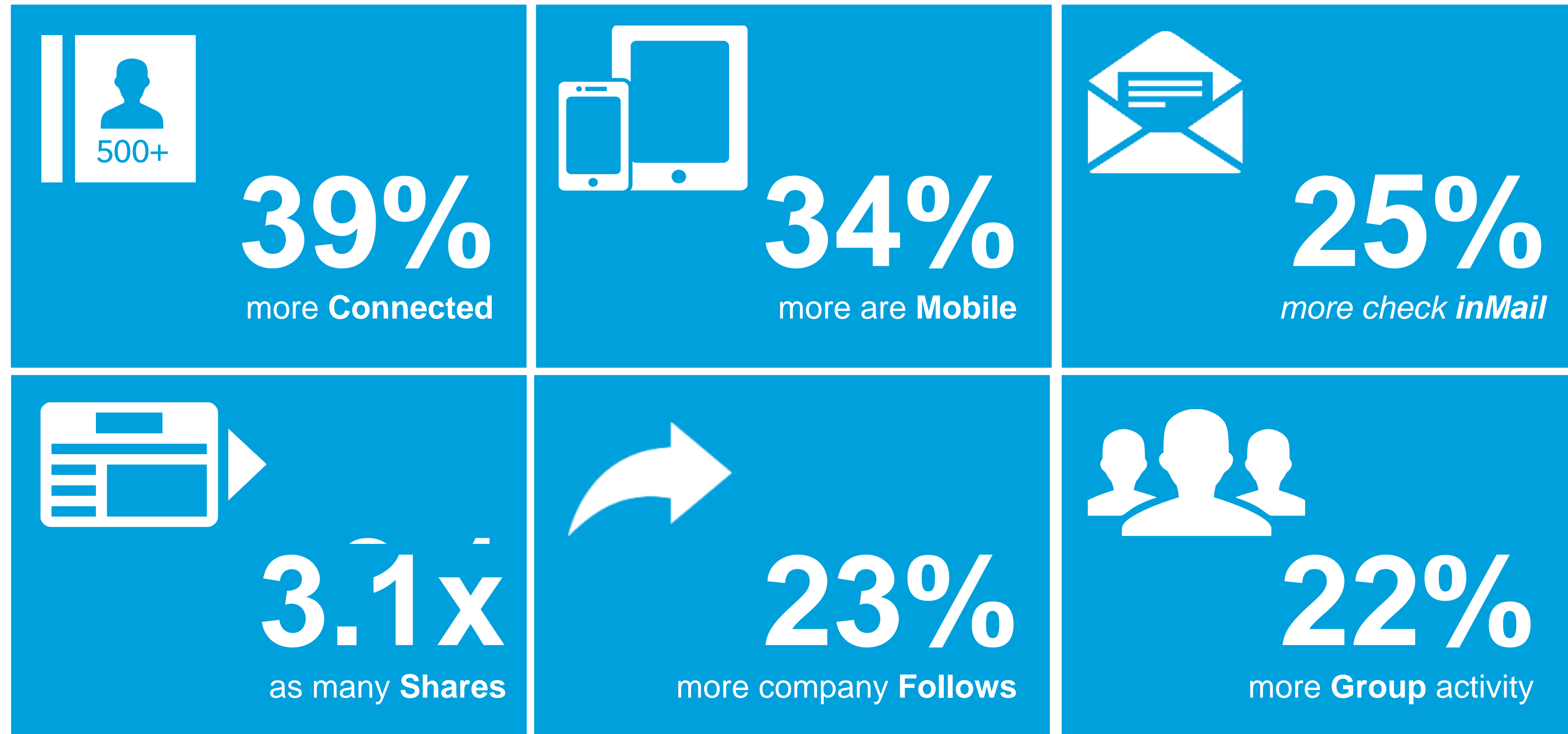
Financial Advisors on LinkedIn

- 450k+ on LinkedIn (out of a total 128M US members)
- Share 3x as much compared to other active US LinkedIn members
- Collectively w/ 250 SalesNavigator Licenses, we are connected to 162K advisors

Financial Advisors on LinkedIn

**#2 of all social
sellers!**

Financial Advisors on LinkedIn



- 500 LinkedIn Influencers
- 300,000 long-form posts generated weekly

Internal Sales Interaction





Linked 



An
Invisible Man


The Before of many of my Salespeople Profiles...

 Add a background photo



Robyn Hood
FA at Sand Funds - #Oppfunds
New York, New York | Financial Services


Current Sand Funds
Education HardKnocks

[View profile as](#) 


9 connections

<https://www.linkedin.com/in/robyn-hood-170006b3> [Contact Info](#)

Add a section to your profile – be discovered for your next career step.

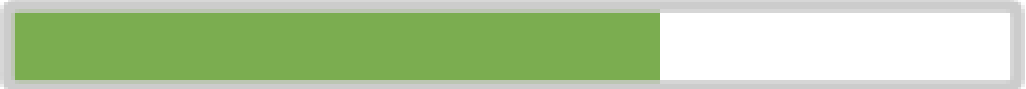
 **Photo**
Members with a photo get 11 times more profile views.

[Add photo](#)


 **Language**
This can help you find a new job, get a promotion, or transfer overseas.

[Add language](#)

Profile Strength

 Advanced

Picture Yourself at Point72 Asset Management



Robyn

[+ Follow Company](#)

[Point72 Academy – 2017 Summer Analyst.](#)
Greater New York City Area [View Now](#)

...and Mine

John Hauryluke PREMIUM English

AVP | Branding Ambassador | CRM Salesforce.com
Evangelist | Marketing & Sales Enablement |
@crmsaasguy

Greater New York City Area | Investment Management

Current OppenheimerFunds, CRM CLOUD PEOPLE LLC,
Randolph Volunteer Fire Department

Previous Financial Recovery Strategies, Coach,
EdisonLearning

Education Montclair State University

[View profile as](#) **500+** connections

<https://www.linkedin.com/in/johnhauryluke777> [Contact Info](#)

Profile Strength All-Star

Great people know great people.

You OppenheimerFunds

[Click here to learn more about our employee referral program](#)

Add a section to your profile – be discovered for your next career step.

LinkedIn/Salesforce Integration POC Proven, Funded & Licenses Obtained

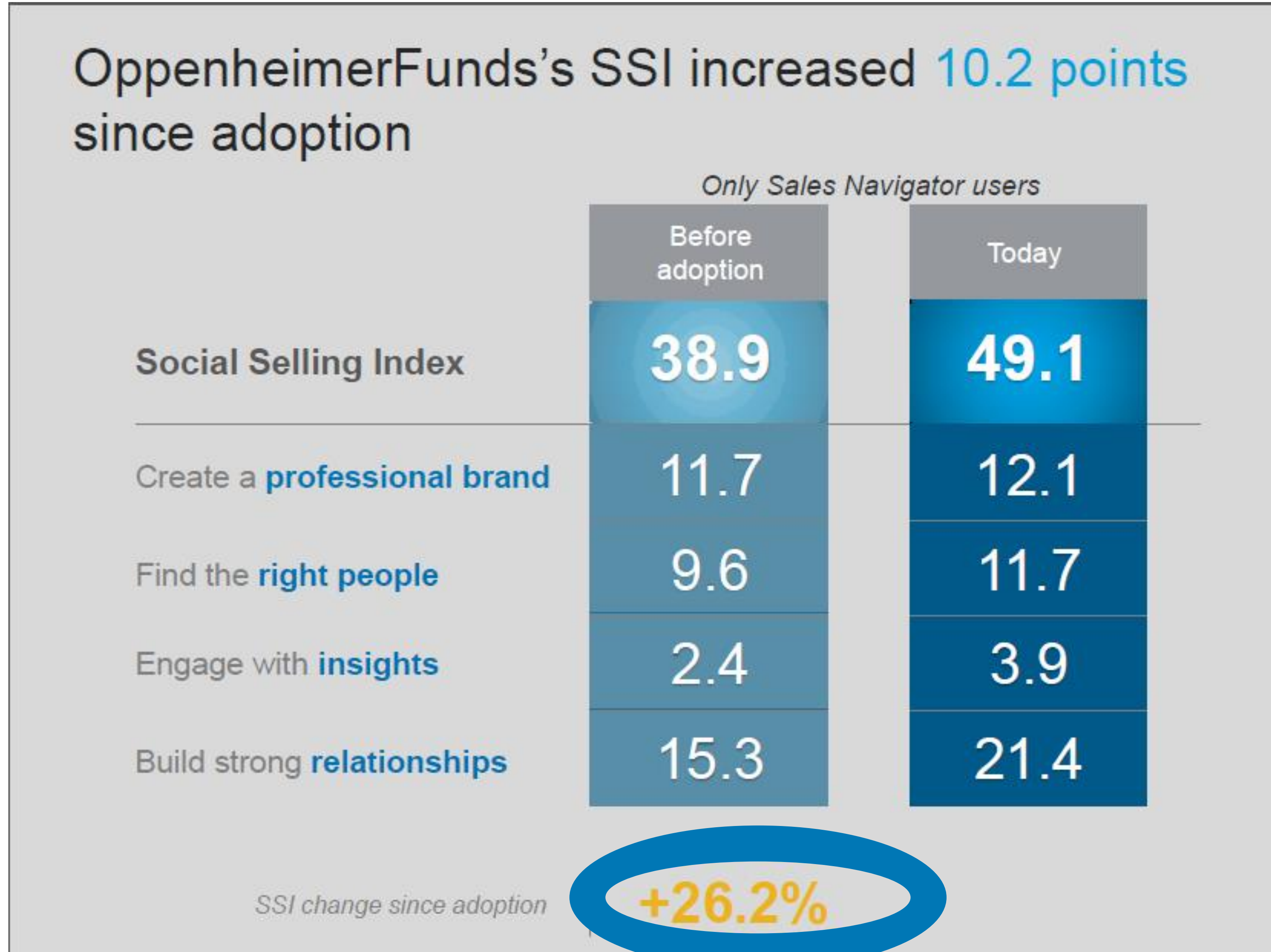
The screenshot shows the Salesforce CRM interface. At the top, there's a navigation bar with 'Home', 'Crystal Ball', 'Chatter', 'Files', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Strategic/Named Account Plans', 'Reports', 'Dashboards', 'Documents', and 'References'. The main content area displays the profile of 'Noah Gold'. Below the profile, there's a 'Contact Detail' section with fields for Name, Gender, Account Name, Title, Job Function, Department, Reports To, and LinkedIn Advocate. A 'LinkedIn Sales Navigator | Member Profile' section is also visible, showing Noah Gold's current position as 'VP of IT at SolarSlash' and his education at 'Arizona State University - Yuma School of Business Management'. The interface includes various sidebar menus like 'QuickLinks', 'Shortcuts', and 'Recent Items'.

The screenshot shows the LinkedIn Sales Navigator interface. The top navigation bar includes 'HOME', 'ACCOUNTS (58)', 'LEADS (212)', 'ADMIN', and 'INBOX'. The main content area displays the profile of 'Noah Gold', Vice President at Arrowhead Business & Investment Decisions. The profile includes a photo, a 'Summary' section with a description of his business development professional background, and an 'Experience' section listing his role as Vice President at Arrowhead Business & Investment Decisions. The right sidebar shows 'How You're Connected + TeamLink™' with connections like Danielle Rosenberg and Noah Gold. The bottom right corner features 'People also viewed' with profiles of Erin Podlesny and Daniel Renaud. The interface includes a search bar and various navigation options.

The Blessing from Compliance and Legal... Thank Goodness



Our Current State of Social Selling Penetration



Advice

What do you need to do to make this happen for your firm or company?

- Make your case with data
- Create customer-focused profiles
- Merge LinkedIn and your CRM
- Enlist a social compliance platform (e.g. Hearsay)
- Train to reinforce engagement and accountability

LinkedIn
Training