

# Proven Sales Strategies for Financial Services



## **Build Trust With Personalized Messages**

- Use InMails for warm introductions from common-connection referrals
- Monitor network connections for “trigger” events to identify new opportunities
- Follow up digitally on conversation points from in-person introductions

## **Make Connections Visible**

- Eliminate ineffective cold calling and leverage existing relationships by making team members’ networks visible to encourage collaborative outreach

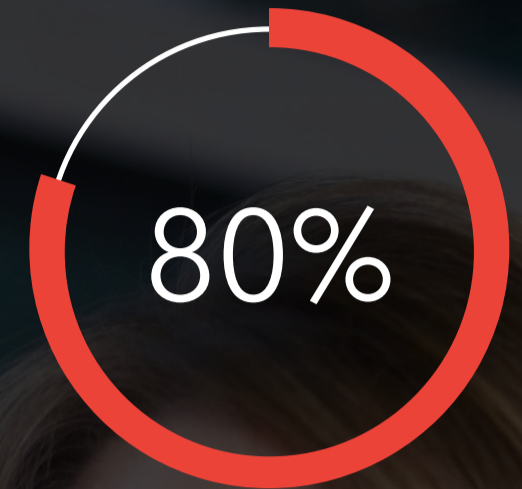
## **Stay Current on Clients, Prospects and Trends**

- Research prospects to gain insight into personal needs and goals before connecting
- Note network alerts on new titles, new jobs and new connections in your network to keep current on client changes
- Follow thought leaders and influencers and repost or comment on relevant posts



“Highly regulated industries have been slow to adapt to social media beyond pre-approved marketing messages, but failing to be more aggressive means missing out on valuable competitive benefits.”

- Amy McIlwain, Global Industry Principal, Financial Services, Hootsuite



Is the average success rate when sellers leverage teammates’ connections to set up a meeting

LinkedIn



Of high-net-worth individuals use social media

LinkedIn

If you want to take your sales to the next level, [download](#) “Proven Strategies From the World’s Top Sales Professionals.”