

# A 5-phase process to leveraging LinkedIn

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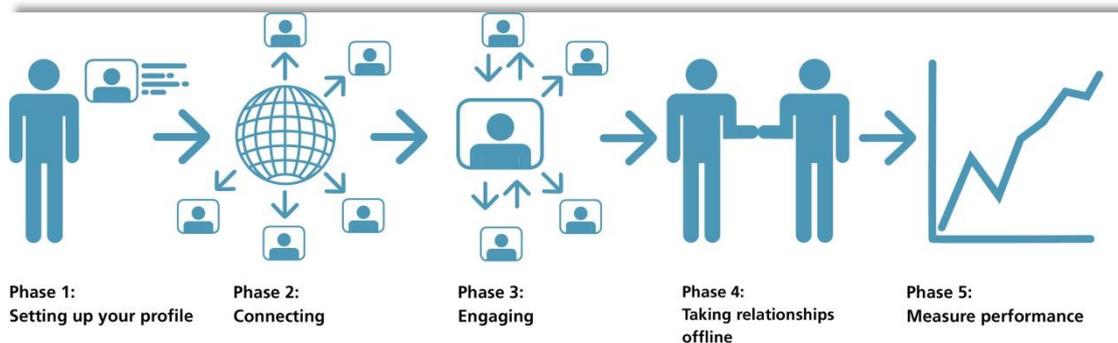
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This piece is designed to help you assist the professionals you work with to harness the power of LinkedIn to grow their practices. In order to benefit from the platform professionals need to recognise that it's about more than simply setting up a profile – it's about using this tool purposefully and integrating it with your existing BD and marketing initiatives, to achieve superior results.

## The 5 phase process comes into play once:

- You are clear about how you will use LinkedIn:
  - How will it help you achieve your goals?
  - How will it fit with your other business development and marketing activities?
  - Who do you want to engage with on LinkedIn?
  - Why would those you want to engage with, want to engage with you?
  - What topics do you want to follow/talk about?
- You understand your firm's policy and have had training
  - Provide an overview of:
    - Your firm's policy and guidelines
    - Legal issues
    - A basic introduction to LinkedIn (and other platforms)
    - Common mistakes and how to avoid them
  - Advanced training for those using social media in an official capacity, which may cover:
    - Responsibilities
    - Goals
    - Expectations
    - The escalation process
    - How to respond in a crisis

## Introduction to the 5-phase process



Designed to:

- Give you a focus
- Give you an understanding about how to build relationships online to generate more work opportunities
- Ensure you don't waste time online.

You can download 6 LinkedIn success stories from [www.lawfirmsandsocialmedia.com](http://www.lawfirmsandsocialmedia.com) (simply go to the free chapter tab).

### Phase 1: Creating a compelling and magnetic profile

#### Why bother?

Imagine that a client or contact has recommended you, along with two of your competitors, to a prospective client. You've all received glowing reports – it's a level playing field. So how can you tip the balance in your favour?

It's highly likely that, prior to meeting you, the prospective client will conduct a Google search so the question you need to ask is: **what will they find under my name?**

*Try it and see.* While your website is likely to be up there so too is your LinkedIn profile. If you want to use LinkedIn for business development and marketing purposes then it's important that your profile positions you correctly.

#### What sort of information should I include in my profile?

I frequently interview clients of law firms (and other professional services firms) to find out how their advisers are performing for them. I've spoken to well over 200 clients of professional services firms over the past two years and 83% said they hire the individual rather than the firm.

However, the backing of a well-established firm is an important criterion for many clients, particularly when matters, projects or cases are large and complex.

Clients define the right individual adviser as:

- Someone with the necessary technical competence/expertise as defined by:
  - Their past experience working on similar projects/matters/cases
  - Their reputation, including their ability to influence decision makers
  - Their knowledge of their subject area
  - Their level of professionalism.
- Someone who is the right fit:
  - At both a personal and a team level (including the wider team of consultants and other experts).
- Someone who understands, or shows they are willing to learn about, the client's business:
  - An adviser who will anticipate needs and protect the client's interests.

This 'horses for courses' approach to appointing professionals provides huge opportunities for those who can **demonstrate** they are the right person for the job. You can use your profile to begin to demonstrate your capabilities, experience and approach in as many ways as you can.

At the very least, your profile should convey:

- Who you help
- How you help them
- Some of the results you've achieved
- Who you are as a person
- A call to action

### 11 Steps to a Compelling Profile:

1. Instead of simply stating your job title in your professional headline, say **who you help** and **how you help** them. For example, 'I am a business development and marketing consultant for the professional services sector', doesn't tell readers about how I help them; 'helping professional service firms retain clients, grow clients and attract more of their ideal clients' does.
2. Include an **appropriate photo** that's in line with your firm's brand.
3. **Consider why you're on LinkedIn** and write your summary accordingly. If you are there for marketing/business development reasons, specify who you help, what you help them with and some results you've achieved. You could include information on your working style/approach, and a little personal information. The aim is to **give people a reason to connect with you** and to begin to **position yourself**.

4. **Build keywords into your summary section** as well as into your **current job title and the *skills and endorsements*** section. When people use LinkedIn's *Advanced search* function and type in a keyword to find a lawyer, the results are based partly on keywords in these sections.
5. **Add videos, Whitepapers, blog posts and other content that will help to position you and that will be useful to those you wish to engage at the bottom of your summary section.** You can upload documents from your system or link to a public URL. You can also include this sort of information in the experience (i.e. job positions) and education sections.
6. **Create posts on LinkedIn.** You have the ability to post content direct to LinkedIn. If you have any blog posts or articles you've written that you'd like to appear permanently near the top of your profile then post these to LinkedIn, by clicking on the pencil 'Create a Post' icon within the 'Share an update' box on the homepage.
7. Over time, **ask for recommendations** from clients, colleagues, business partners etc. (provided this is allowed by your firm). Themes will quickly emerge and recommendations give people a real and valuable sense of what you're like to work with.
8. Include a **link to your website**. When including the link, instead of selecting *Company Website*, scroll down and select *Other*. You can then name your website either with your firm name or with a short enticing sentence to encourage click-throughs – such as 'Conveyancing Toolkit'.

**Websites:**

9. If you Tweet regularly (for business purposes) add a **link to your Twitter account**.
10. Include some information in the **Interests section** - people want to connect with like-minded individuals, because 'people like people like themselves'. A common interest is a good conversation opener.
11. Put your basic **contact information in both the *Personal Information* section and the *Contact Settings* section** - this will ensure people who find you through both LinkedIn and Google (or another search engine) can contact you.

In order to get found before your competitors, you will need to optimise your profile by incorporating relevant keywords throughout. You can use free tools such as Google Adwords to find out the best keywords to use.

Once your profile is complete and you are happy with it, you can begin to connect with others.

## Examples of good LinkedIn profiles:



Brad Golchin - <http://nz.linkedin.com/in/bradgolchin>



Callum Sinclair – <http://uk.linkedin.com/in/callumsinclair>



Jessie Foley – <http://nz.linkedin.com/in/jessiefoley1>



Angus Ogilvie – <http://nz.linkedin.com/in/angusogilvie>



Tom Skotidas - <http://au.linkedin.com/in/tomskotidas>

## Setting up your LinkedIn company profile

While LinkedIn is primarily set up for individuals to engage with one another, it has put a lot of effort into developing its company and showcase pages. I recommend you set these up for your firm as, over time, other LinkedIn users can choose to follow you.

There will be some overlap with your website but it's no longer safe to assume that people will go to your website. If people are on LinkedIn, make it easy for them to find all the information they need to know about your business within that platform.

**Not convinced?** Take a look at your company profile and see how many followers you already have. These people have chosen to follow your firm and will see any status updates you share. Look at who they are and, if they're people you want to engage, think about how you will do this. Otherwise it's a missed opportunity. Some of the big international law firms have well over 5,000 followers on LinkedIn but have not made anywhere near full use of their company pages.

Showcase pages are a relatively new addition. They are related to but separate from your company page and replace the old 'Products & Services' section. LinkedIn allows firms to set up 10 Showcase pages (if you want to set up more, you'll need to contact LinkedIn). Showcase pages are designed to

showcase a particular aspect of your practice and to allow members to follow those parts of your business of interest to them. From a 'follower' perspective they're great as you can cut through the clutter but from a firm's perspective they create a lot more work. Each showcase page will need to be managed in much the same way as the Company page so you'll need to ensure you have the necessary resources to manage these prior to setting them up. If you do, then definitely look to set these up for key industry sectors and practice groups.

Learn how to set up a Showcase page here: [https://www.youtube.com/watch?v=cA\\_HFK5clWc](https://www.youtube.com/watch?v=cA_HFK5clWc)

When you post to your company page or showcase page, you'll have the option to sponsor the update. This means you can pay for it to appear in the newsfeeds of a defined audience. There's also the ability to directly post sponsored content without it appearing on your company or showcase page. Imagine there's an upcoming RFP. You could pay for relevant content to appear in the newsfeed of specific people within the tendering organisation; giving you another way to position your firm before the RFP's even been issued.

## Phase 2: Connecting with others

### Why grow your connections?

When using LinkedIn search (on the free account) you enjoy full name access to all connections within your 1<sup>st</sup> and 2<sup>nd</sup> degree network, plus those in your groups.

You have limited access to your 3<sup>rd</sup> degree network.

Establishing more 1<sup>st</sup> degree connections means you grow your total network.

A larger total network means you enjoy more 'full name' access to more prospects through LinkedIn's Advanced Search feature.

#### You have 3 options:

1. Connect with more people so that you see richer information in the search results (limited to 100 results)
2. Upgrade to a paid LinkedIn account
3. X-ray search into LinkedIn through Google

### 6 ways to find those you wish to connect with on LinkedIn

1. **Import or sync contacts** – you can import or sync desktop email contacts (or webmail contacts) to LinkedIn. Click the 'Connections' button on the LinkedIn toolbar and select 'Add Connections' then follow the prompts (I advise against syncing as LinkedIn pulls in recent email conversations with that person, which could breach client confidentiality).

If you import contacts a list will pop up with all your contacts, letting you know which of them is on LinkedIn and how long they have been a member. All boxes are ticked so be sure to uncheck those you DON'T want to invite to connect and then click *Send Invitations* (n.b. you may be better inviting people individually so you can tailor your invite).

If you are just exploring this feature and do NOT wish to invite people to connect, hit the 'Back' button on your browser. In 2010, I had a look at the feature using my husband's Gmail account and inadvertently invited 150 of his contacts to connect with me. Interestingly, over half accepted my invite despite me not knowing many of them! Two professionals I've spoken to recently have made this same mistake.

2. **2<sup>nd</sup> degree connections** – provided your contacts have their connections on display, you can look through and see who you know. You can then invite them to connect.
3. **People you may know** – this box appears on the right hand side of the Home page. It can be useful, once in a while, to click on the See more button in that box and have a quick look through to see if there are any other people that you know who you would like to add to your network. This list typically suggests people who are second degree connections of yours (i.e. those people who are directly connected to your connections).

You may wish to invite people individually as, if you invite them from this screen you don't have the ability to customise your invite.

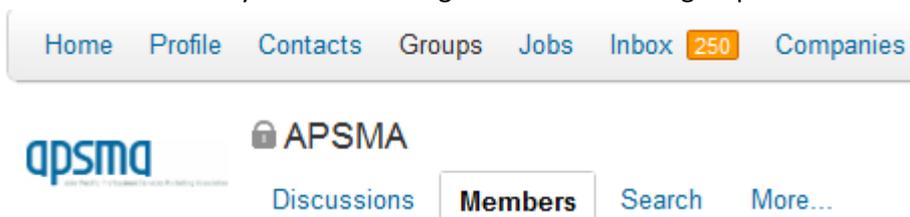
4. **Search** – you can use the 'Search' feature at the top of each LinkedIn screen to search for specific people.
5. **Advanced search** - This function is particularly useful if you are doing any planning at a practice group, industry sector, key client or personal level.

You'll find the Advanced search feature on the right-hand side of the search box within your LinkedIn header. Click the 'Advanced' button and this will take you through to the Advanced Search screen.

You can search by a range of criteria (and combine criteria to narrow down your search).

6. **Groups** - You can directly connect with anyone with whom you share a group.

In order to connect you will need to go into the relevant group and select 'Members'.



This will pull up a list of all members in the group, sorted by their relationship to you. First-degree connections will appear first, followed by second and then all others.

You can search for specific people using the 'Search members' box.

### When connecting with others:

- Tailor your invite. Even if they're someone you know really well you have the opportunity to start a conversation.
- If it's someone you don't know well (or at all) think about why they should connect with you – what's in it for them?

### 5 ways to invite people you don't know to connect

1. Do you know any people in common? If so, you could ask for an introduction or mention this person/these people when connecting.
2. Are you both members of a particular LinkedIn group? If you share groups with someone you can mention this (and the common interest you share) when connecting.
3. Are you both going to be at the same event? If you're both speaking at, or attending, an event, you can use this as a reason to connect.

4. Do you share similar interests? If you search someone's name in Google you may be able to find an article, blog post, video or presentation they've put together that you can reference in your invite.
5. Is the person on Twitter? If so you may wish to follow them there. You can retweet their content and strike up a conversation. You can then extend the relationship to LinkedIn.

### Phase 3: Engaging on LinkedIn

This is a key component of leveraging LinkedIn and any other social network. If you are on LinkedIn but do not engage with others, you are highly unlikely to generate new work.

The beauty of social networks is that they promote dialogue - so they enable you to begin to demonstrate your expertise and to position yourself without overtly 'selling'. This means you can have the conversations you would like to with the people you would like to talk to.

The key things to remember are to be authentic. Be yourself. Let your personality come through. Ask questions and be curious. Focus on helping others rather than how they can help you. Be clear about the types of conversations you want to be involved in (this will ensure you don't waste time online) and the people or types of people you wish to engage.

There are a number of LinkedIn features you can use to engage others. These include:

- Status updates – which appear in the updates stream of all those people to whom you are directly connected.
- LinkedIn email – which you can use to send emails to any of your connections, second degree connections, and members of your groups.
- Inmail (paid emails via LinkedIn) – these allow you to email anyone who is on LinkedIn.
- Groups – by searching for and joining those groups to which your ideal contacts belong, you can look to converse with them here.
- Advanced Search (to identify those with whom you wish to engage) – you can use this feature to identify prospects in specific industry sectors, or with certain job titles.
- Pulse – this is essentially LinkedIn's newspaper. It is a good source of information that you can share with those in your network or with your clients and contacts who aren't on LinkedIn.
- Ads (including the new video ads). You can pay to advertise on LinkedIn and can get quite specific in your targeting. You can produce up to 15 versions of your ad so you can test what works well and what works less well.
- Sponsored updates and direct sponsored updates – you can pay for your updates to appear in a specific demographic's newsfeed. Provided you share content useful to them this could

be a really valuable feature that could get you noticed by those outside of your direct network.

It is at this stage that you begin to turn the traditional business development process on its head. Rather than meeting people offline and then connecting with them on LinkedIn, you meet people on LinkedIn, converse with them there and then take the relationship offline.

### How can you use status updates?

- To talk to your connections
- To position yourself and overcome pigeon-holing by sharing relevant content
- To promote your connections' work (by re-sharing, commenting on or liking their content)
- To generate qualified leads (e.g. by encouraging click throughs to your website or landing page)

### What makes a good status update?

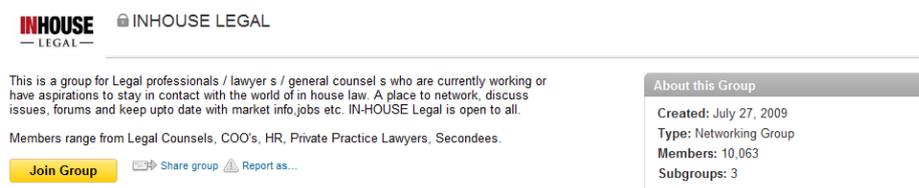
- Timely content
- A good introduction e.g. who should read it and why
- Content that helps to position you (i.e. that reflects your brand)

### How to find relevant Groups

The easiest way to find appropriate groups is to look at the groups to which those you want to learn from, or engage, belong. To do this, simply go to a person's profile and scroll to the bottom for the list of their group memberships. You can then click on a group to find out more about it and determine if you want to join too.

The LinkedIn search function is the other key way of finding appropriate groups. Either select groups from the drop-down list to the left of the search box and then type in your keyword or just type in the keyword and you'll see groups about half way down the search results. You can either click on a group you're interested in or click on the magnifying glass and then select 'Groups' for more info.

Clicking on a group title will take you through to the group discussions (if it's an open group) or to a screen with more details about the group, including the Group Statistics and who in your network (first- and second-degree connections) is a member (if it's a closed group).



The screenshot shows the LinkedIn profile for the 'INHOUSE LEGAL' group. The group description states: 'This is a group for Legal professionals / lawyer s / general counsel s who are currently working or have aspirations to stay in contact with the world of in house law. A place to network, discuss issues, forums and keep upto date with market info.jobs etc. IN-HOUSE Legal is open to all.' Below the description, it lists 'Members range from Legal Counsels, COO's, HR, Private Practice Lawyers, Secondees.' There are three buttons: 'Join Group' (yellow), 'Share group', and 'Report as...'. On the right, the 'About this Group' box shows: 'Created: July 27, 2009', 'Type: Networking Group', 'Members: 10,063', and 'Subgroups: 3'.

Group Statistics is a great tool that allows you to see at a glance the composition of each group – the members' seniority, function, location and industry. You can also view the group's growth and activity, and the number of members.

This will give you a good idea about whether or not you should join a particular group.

### 10 Tips for starting and running Groups

1. Have a really clear purpose and aim to attract people with common issues
2. Check the groups directory first to ensure you're not duplicating another group
3. Use keywords in the group name so that those you wish to join will easily be able to find it using the group search feature.
4. Add clear group rules and enforce them
5. Preload 2-3 discussions and ask a couple of your contacts to join the group and comment on these or to post discussions of their own
6. Use your allocation of moderators (9 plus the manager)
7. Personalise your invitations
8. Invite clients and contacts and use LinkedIn's Advanced Search function to identify others you'd like to join.
9. Make use of the Group announcement feature on a monthly basis.
10. Leverage group discussions (e.g. by turning them into blog posts).

### Phase 4: Taking relationships offline

You are very unlikely to get new business simply by being on LinkedIn. Sharing valuable content and starting to build relationships with others via LinkedIn all help to build credibility and trust. However, if you really want to benefit from your online conversations and win new business, you need to take the relationship offline.

Some ways you might transition from online to in-person include:

- Follow up a discussion via LinkedIn email and suggest a meeting or phone conversation.
- Invite a LinkedIn contact or someone in your group to an event that they would benefit from attending. Let them know why they should come. You may even want to ask one of your contacts or a fellow group member to speak at your event.
- If someone who is an ideal contact has looked at your LinkedIn profile, email them introducing yourself and asking if you can help. One Barrister I spoke to does this and has generated new work as a result.
- If someone has shared something that you'd like to find out more about ask them if they'd mind talking to you further about it. I have done this with a number of people and they've always been happy to chat. I've got some great information and contacts as a result.

- Send someone something related to the topic you've been discussing, and ask for their opinion, advice or feedback because you'd genuinely value their input.
- Ask a person you admire or who is a subject matter expert if they would like to write an article for your newsletter, blog or website.
- Set up a coffee meeting with one of your LinkedIn connections each week or fortnight.

## Phase 5: Measuring your efforts

There are three stages to measuring and reviewing your social media activity:

1. Actively listening
2. Measuring what matters
3. Interpreting and reporting measures

### Actively listening

An important component of measurement is actively listening. One objection I hear from professionals about using social media is 'what if someone says something bad about me or us?' My answer: 'they may already be doing so, wouldn't you want to know about it so you can determine whether and how to respond?' I know I would.

People may also be saying positive things about you. Either way, if you know about it, you can respond (if appropriate) with a simple thank you or an 'I'm sorry you had a bad experience, I'll call you now to discuss how I can put things right'. The benefit is that others who see the comments will also see that you have responded and that you are someone who listens to, and cares about, others.

Another benefit of actively listening to social channels is that you may uncover opportunities. For example, there are often people looking for a lawyer on Twitter. If they're looking for someone with your skills you can respond. You may even pick up a new client.

### Measuring what matters

What you measure will really depend on why you're using LinkedIn. Any measures need to be tied to this. Measuring things that have little bearing on your business or marketing objectives is pointless. My advice is to pick a few key measures and focus on these (looking at trends over time) rather than trying to measure everything.

Remember that LinkedIn is the means to an end rather than the end itself so you will want to measure the success of specific activities in conjunction with offline activities. As such, you may want to measure things such as growth in media requests, growth in attendee numbers at your events, growth in requests to speak at industry conferences and workshops, or growth in number of inbound enquiries.

There are a number of monitoring and measuring tools out there both free and paid. A comprehensive list of measurement tools can be found at: <http://wiki.kenburbery.com/social-media-monitoring-wiki>

As mentioned earlier, good free tools that do the basics are Google Alerts - <http://www.google.com/alerts> and Social Mention Alerts - <http://www.socialmention.com/>

## Interpreting and reporting measures

For those of you in larger organisations, it's important that you analyse and interpret your measures and report these to your Managing Partner, Board or other interested parties in a way that will appeal to them. Getting new work via LinkedIn isn't typically something that happens overnight and that you need to have realistic expectations. However, there are indicators you can measure to establish if you are on the right track. If referrals from LinkedIn to your website grow over time or if more of those in your target audience are signing up to your newsletters, seminars or blog, then you are seeing traction. If not, you may want to test and measure new ways of doing things. The beauty of these tools is that the same thing won't work for everyone so you can be creative and try new things. You'll know very quickly whether or not they're successful.

By interpreting the data you can regularly assess what is/isn't working and tweak things accordingly.

The book *Social Media ROI* by Olivier Blanchard is a fantastic resource for those thinking about what and how to measure their efforts.

## Integrating social media – in action

Social media is one weapon in your marketing arsenal. To be effective it needs to be integrated with everything else you are doing. The following 3 scenarios set out how social media can improve the success of existing initiatives:

### Scenario 1: Running an event

If you are going to run an event you might want to use social networks to find a good speaker or to find information you can use in your presentation. Twitter and LinkedIn are both great sources of this type of content. Once you are ready to promote your event you could share it on Twitter, Facebook and LinkedIn with a link to your sign-up page. You could ask your colleagues to do the same. You might also want to send a private message to one or more of your contacts on each of these platforms.

If the event is large, you could set up a Twitter hashtag so that those attending can live tweet from it, and organise to meet other attendees, while those who aren't can follow along on Twitter.

Post event you may want to share your presentation slides via these channels, offer them to people in a LinkedIn group, or adapt them to a blog post, article, video etc. (or series of posts, articles, videos) which you can again promote via social networks.

### Scenario 2: Preparing for a new business meeting or RFP response

If you're like most professionals, you'll likely attend new business meetings or be required to respond to RFPs occasionally. Using social networks for research and planning purposes could make the difference between winning the work and not doing so.

Prior to a new business meeting you could perform a Google search on the person/people you will be meeting. You may find some social media profiles turn up in the results. Take a look at these – the person may be tweeting in which case you can have a look at the content they share to ascertain their interests. You may want to retweet (i.e. share) one of their tweets with your followers. This is a good way to get on a person's radar. They'll see you've done this and will likely thank you for doing so. This is a good way to initiate a conversation. If the person/people are on LinkedIn have a look at their profile and their recent activity. Again this will provide you with some insights you may be able to use during the meeting. When looking at the person's profile see which LinkedIn groups they belong to. You may want to consider joining one or more of these and contributing to discussions so that you've already begun to showcase your knowledge and expertise before the meeting.

You may also want to see if the organisation you are meeting with has a twitter account, a Facebook page, a Google+ account and a LinkedIn company profile. If so, take a look at these and follow/like them. You can then keep up to date with what's happening within that organisation. This may assist you to better prepare for meetings and RFP responses.

If you follow or connect with others on social networks they are likely to follow you back. This means they will see any updates you share. This gives you another opportunity to share information they will find valuable and to position yourself in your area(s) of expertise.

Some (typically larger) professional services firms strategically post content prior to tenders coming out in order to position themselves as an authority in the areas of interest to that client. They then point to this content in their RFP response. This is a good tactic and one that could work for all sizes of organisation. But it does require a bit of time and effort.

### **Scenario 3: Positioning yourself as a go-to specialist in your field**

There are some professionals who work hard to build their profiles. They speak at conferences. They write books and articles. They run seminars. They comment in the media. Leveraging social media can help you to create more of these opportunities.

For example, I recently spoke to some legal and business journalists who said they use LinkedIn and Twitter to source stories and commentary. They follow or connect with professionals in their areas of interest and look through LinkedIn group discussions to see if there are any potential stories there. If you want to be quoted in the media then initiating and contributing to LinkedIn group discussions is a great way to attract journalists' attention. You may also want to follow selected journalists on Twitter (they may then follow you back) and connect with them on LinkedIn. If you then tweet or share status updates on topical issues the journalists may see these.

The journalists I spoke to said they are always looking for new sources and don't like to keep going back to the same firms. However, large firms tend to have a corporate affairs person who responds in a timely manner. This highlights the need to respond promptly to journalists if you are contacted by one through LinkedIn or Twitter – even if it's to say you can't help this time. Not doing so means they are unlikely to contact you again.

Sharing valuable content (both that you have created and that others have produced) via social networks increases the chances of conference organisers, publishers and prospective clients contacting you. As a result of sharing a free guide in a LinkedIn group, I was asked by a leading professional services marketing magazine if they could reproduce one section in their magazine. I

also received over 400 requests for the guide, have connected with many of these people, and have generated new work as a result.

## Summary

To realise the benefits of social media you need to be active – consistently so.

Whether you use LinkedIn and/or other channels such as Twitter or Facebook to reconnect with dormant clients or former colleagues and to rebuild the relationship from there, or you harness their power to strengthen existing client relationships and to find and help prospective clients, the principles are the same: **focus on the other person and their needs, be yourself and build relationships one at a time. If you do this you'll reap the rewards.**

Good luck. I look forward to hearing about your social media success story.

Kirsten Hodgson

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