

# CFA Career Event

## How to enhance your online presence

Thursday, October 24<sup>th</sup> 2024

Francine Hamelberg | Morningstar



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Hi, Welcome! Nice to meet you



Francine Hamelberg

- Digital Marketing Specialist
  - Social Media
  - Email Marketing
  - Marketing Automation

Before we start...

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## When is the last time you posted on LinkedIn?

- Never
- Last Year
- Last Month
- Last Week
- Yesterday

*What is the post about?*

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# When is the last time you update your profile on LinkedIn?

- Never
- Last Year
- Last Month
- Last Week
- Yesterday

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## What will be covered today?

- Benefits of Social Media
- Do's & Don'ts on Social Media Posts
- Building an effective LinkedIn profile

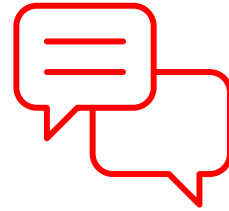
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# Benefits of Social Media

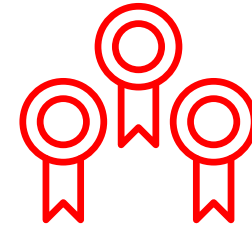


**Increase visibility**

(Internal & External)



**Networking Opportunity**



**Personal Branding**



**Learning & Professional  
Development**



**Research Tool**

# How to be successful on social?

## LinkedIn vs. Twitter (X)

Tips and tricks on best practices for social amplification on each platform

	LinkedIn	Twitter
<b>Posting frequency</b>	At least 3–5x per week (No more than <b>once per day</b> )	At least 2–4x per day
<b>Audience</b>	<ul style="list-style-type: none"><li>• Consider location</li><li>• Who is your target audience?</li><li>• What is the primary language of your intended audiences?</li><li>• Put content into your own voice</li></ul>	<ul style="list-style-type: none"><li>• Consider location</li><li>• Who is your target audience?</li><li>• What conversations are your audiences engaging in?</li><li>• Are you utilizing hashtags in your tweets?</li></ul>
<b>Content</b>	<ul style="list-style-type: none"><li>• Sharing a variety of content can help keep you relevant to your audiences.</li><li>• Use hashtags, tag companies and people, ADD VALUE!!</li></ul>	



# What is the proportion of my LinkedIn posts?

## The 5-3-2 Rule

- 50%**:Your unique perspective that informs, educates, and is useful to your audience.
- 30%** Engage your audience (asking a question, creating a poll)
- 20%** Promote your organization. (new announcements, events)

Samantha Lamas • 1st Senior Behavioral Researcher at Morningstar

Hope to see everybody at the Morningstar Investment Conference this year, especially at my session with the amazing Danielle Labotka! We'll be talking about the lifecycle of advice and all about converting prospects to lifelong clients. We've found ways that advisors can work with their clients to develop their business, like attracting new clients, retaining them, and actively avoiding losing them. Register today and see what we have in store! <https://lnkd.in/gTvWIFxJ>

Reconnected with two of my friends and Stephanie Lerdall

Great seeing so many new and old faces brimming with insights and great ideas!

Angelina Haynes and 35 others

3 reposts | 1 report on the matter: <https://lnkd.in/gnwAAE8U>

#investorbehavior #financialadvisor #investing #money

**THE TOP 5 FACTORS SHAPING CLIENT-ADVISOR DYNAMICS**

Investors' motivations for working with an advisor go beyond financial reasons, and are often influenced by emotions.

**REASONS FOR HIRING**

- 32% Discomfort handling finances
- 17% Behavioral coaching
- 12% Recommended by family or friends
- 10% Quality of relationship
- 32% Specific goals or needs

Emotional factors made up the largest share of total responses.

Here are 5 ways advisors can provide value to their clients and grow their practice:

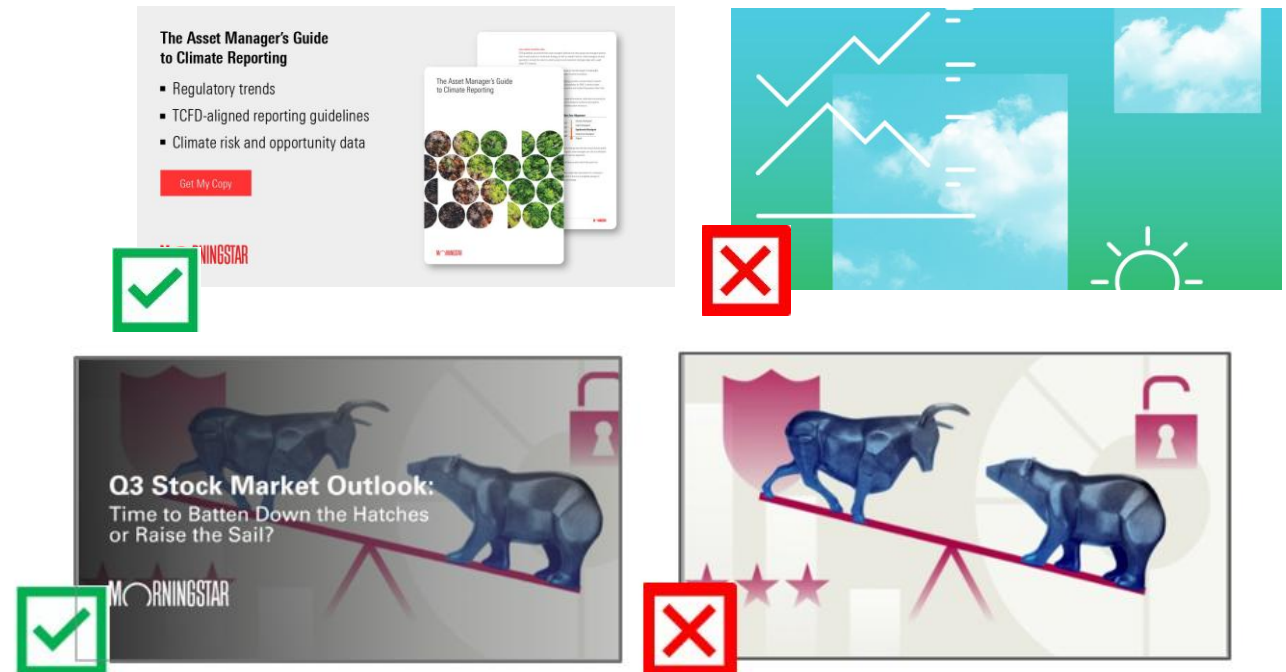
- 1 Address clients' emotional needs early on
- 2 Demonstrate how you can offer support
- 3 Use ordinary language
- 4 Provide education to help clients stay on track
- 5 Acknowledge that these are issues we all face

By addressing emotional factors, advisors can more effectively help clients navigate complex financial decisions.

# Do's and Don'ts when Creating Content

## Creative Formats:

- Image with text
- Photos of influential figures
- GIFs
- Quotes
- Short Video
- SlideShare
- Illustration or animation
- Carousels



# Use this checklist!

Some of the best practices for successful creatives on LinkedIn:



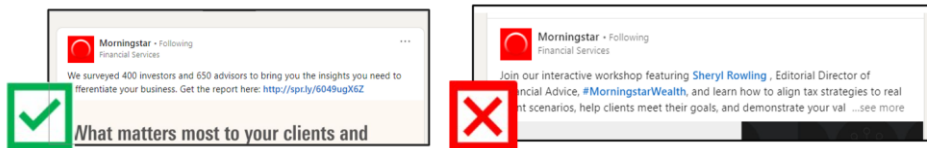
	LinkedIn Creative Best Practices
1.	Be concise
2.	Avoid stock imagery
3.	Use vibrant, unexpected or otherwise scroll-stopping visuals
4.	Include captions on videos
5.	Use distinct and consistent branding
6.	Ensure creative is relevant to your audience
7.	Treat your image as your headline
8.	Keep intro copy <150 characters
9.	Maximize the real estate available
10.	Keep # of pages for document ads <10

# Do's and Don'ts when Creating Content

## LinkedIn

### Copy

- Limit: 3000 characters maximum (Ideal: 200-250 characters)
  - Use a hook in the first sentence and keep links above the fold
- Integrate key phrases and words that will catch your audience's attention
- Tag important partnerships and relevant companies



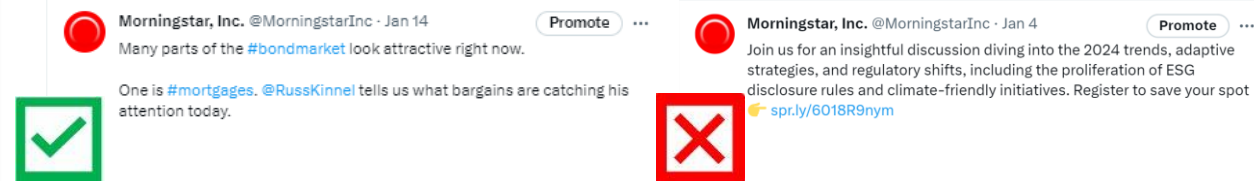
### Pro tips:

- Use **CTA (Call to action)** that is clear and concise on what actions you want the user to take
- Use **simple/familiar emojis** that create a self-explanatory story

## Twitter (X)

### Copy

- Limit: 280 Characters (Ideal: 240 –259)
- @Tag relevant profiles (Ideally no more than 2 per post)
- Use relevant #hashtags (3-5 per post)



### Pro tips:

- Use photos for additional Retweets & more engagement
- Use stats and charts to boost Retweets
- <110 characters get higher engagement

# Build an Effective Profile

- Always keep your profile updated (every 3 – 6 months)
- Include your title & company name in at least your bio
- Add in your location

The image shows a screenshot of a LinkedIn profile for Bill McDermott, with several blue arrows pointing to specific elements and text boxes providing instructions:

- Claim a custom URL**: Points to the URL bar at the top of the browser window.
- Add a cover photo that tells a visual story about you and/or Morningstar**: Points to the large banner image at the top of the profile.
- Add your pronouns if preferred**: Points to the profile name area.
- Ensure Creator Mode and related functions (e.g., 'Follower' button instead of 'Connect' button) are turned on**: Points to the 'Follow' button.
- Add Featured section to drive traffic to evergreen highlights from your career and life**: Points to the 'Featured' section containing three article cards.
- Ensure Experience & Education are updated to credential your background**: Points to the 'Experience' section.
- Use your About section to tell a story about your career and expertise**: Points to the 'About' section at the bottom.

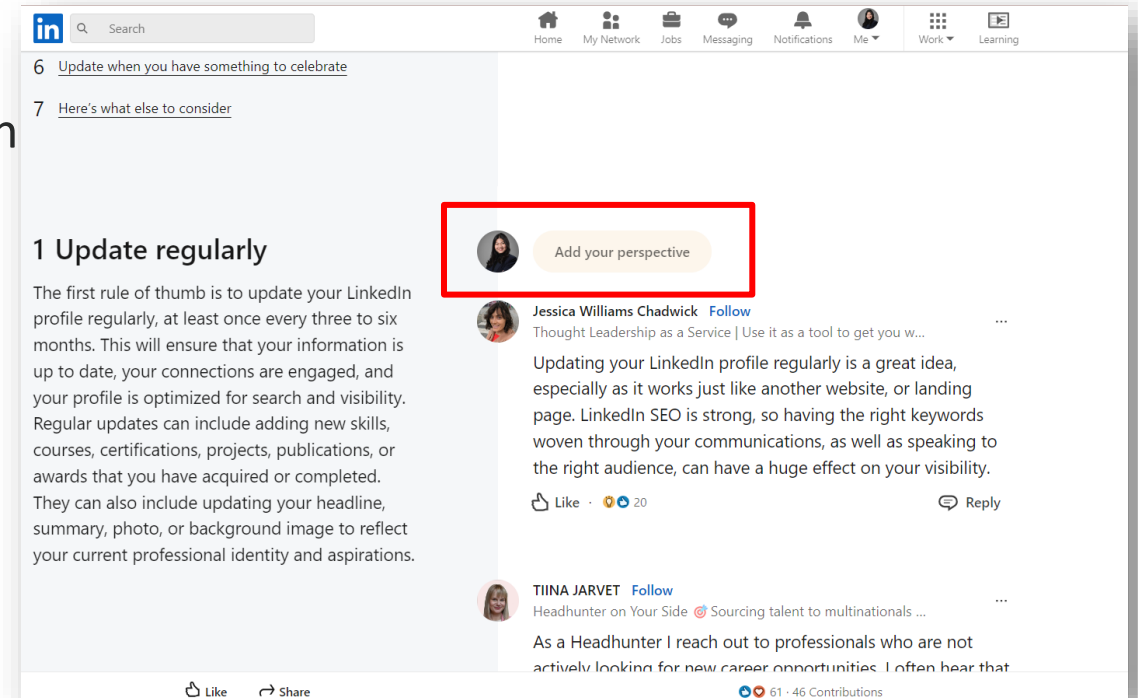
## Increase reach by 20% with Creator Mode

- Go to your profile and click on the "Me" icon.
- Click on "View Profile" and scroll down to the "Resources" section.
- Click on "Creator mode" and then click on "Turn on."

Turning on creator mode lets people know that your profile is a source for inspiring content, helping you gain followers

# What more can you do on LinkedIn?

- Start growing your network
- List your relevant skills (show you passion for learn
- Request recommendations and give endorsement
- Showcase your knowledge
  - Be a contributors & get a Badge
  - Add opinions and thoughts to the articles



# Top Analyst LinkedIn Posts at Morningstar

## Top performing content features:

- Gifs/Animation
- Use Quotes
- Use Stats
- Image/Video ft. People (untreated)
- Image/Video ft. Data viz
- Image ft. Text overlaid
- Video ft. Captions
- First 3 seconds of video has a hook
- Video ft. Speaker name/title overlay

**Dave Sekera**  
US Market Strategist at Morningstar Research Services  
2mo

It was my pleasure speaking with Joe Kernon on **CNBC** this morning.

With Growth & Tech stocks either fully- or overvalued, what's worked for past 1 ½ years won't be what will work for the rest of this year.

Time to start taking profits in stocks that have become overvalued & overextended and reinvest in more contrarian plays. Look for what's underperformed, unloved—and most importantly—undervalued.

What fits the bill? real estate, energy & utilities.

<https://lnkd.in/gssZ8e2f>



**Danielle Labotka (She/Her)** • 1st  
Behavioral Scientist  
1d •

Advisors shouldn't shrink away from using generative AI.

Gen AI provides advisors the opportunity to upskill things their clients value in working with a human, like strong communication. Read on to learn more about how Gen AI can help you communicate with clients better.

#financialadvisor #genAI

**Morningstar Australia**  
5,075 followers  
2d •

5 steps for using an #ai strategy in your practice as highlighted in this week's FS Advice newsletter with Morningstar's **Danielle Labotka**. Read it here: <https://mstar.me/3wXGC00>

IN THE PRESS

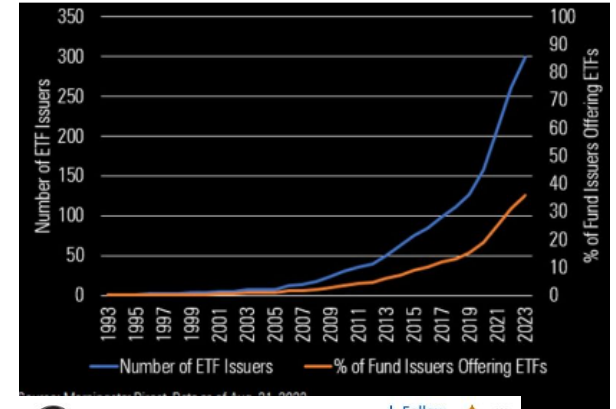
**"The job of financial planning is more human-centric than ever. If anything, generative AI can help make financial advisers better at their jobs"**

Danielle Labotka  
Morningstar

**Ben Johnson, CFA** • 2nd  
Head of Client Solutions, Asset Management  
4mo •

+ Follow

There are now nearly 300 brand names in the U.S. ETF space--representing ~35% of all the brands in the mutual funds and ETF business.



**Michael Field, CFA** • 2nd  
Equity Market Strategist at Morningstar  
2d •

+ Follow

It was great to take a short break during the MIC UK conference to speak on **Asset TV** about everything European equity markets.

**Asset TV UK**  
4,823 followers  
2w •

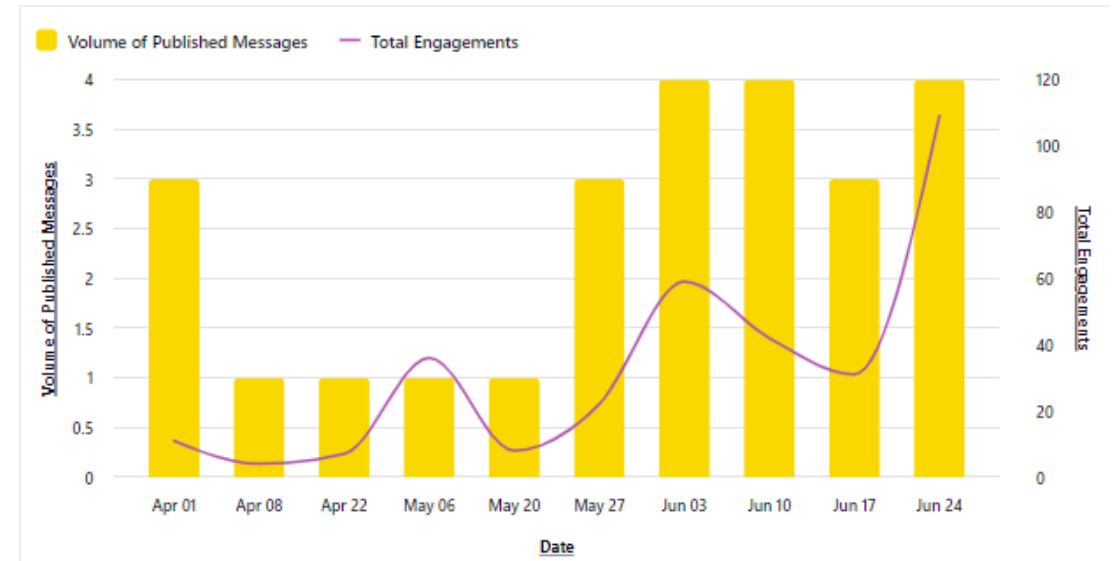
+ Follow

Watch as **Michael Field, CFA**, European Equity Market Strategist at **Morningstar**, joins us at the Morningstar Investment Conference UK 2024 to dissect surprises in #EarningsSeason [https://lnkd.in/d\\_PiPnpp](https://lnkd.in/d_PiPnpp)

Michael also assesses European market valuations, and discuss the potential impact of ECB rate cuts on sectors like consumer and financials.

# Request a private strategy session with your social media team

- Comprehensive audit of social media engagements
  - Review Y2023 and/or YTD to establish benchmarks and strategies.
  - Explore personalized strategies to surpass these benchmarks by EOY
- Key metrics from social media management platform
  - Volume of Published Messages
  - Total Engagement for each channel
  - Average Engagement per Channel
  - Overall Average Engagement





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## 5 Key Things

1. Always keep your profile up-to-date (every 3 – 6 months)
2. One post per day on LinkedIn
3. Keep the URL above the fold for visibility
4. Turn on LinkedIn Creator Mode
5. Use LinkedIn About section as your SEO Driver to your profile