

47 Financial Advisor
LinkedIn Messages
and
Sequences

*That Will NOT
Make You Look Stupid*



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Hello from Sara

Hello and thanks for reading my e-book. My name is Sara Grillo. I am a CFA® charterholder and I used to be a financial advisor.

I wrote this for financial advisors who want to be perceived as high-quality people on social media. This e-book contains 47 messages you can use on social media messenger to reach prospects, COIs, reporters, and other useful connections.

LinkedIn messaging is a delicate thing. You get one shot and if you mess up, the person is never going to trust you again. You have to know what you are doing and that is what this book is going to teach you.

This e-book is not fancy or highly decorated. True to my nature, this is a no BS, straight to the point piece of writing.

These messages serve to inspire your own thought about what to say to someone on social media. Please customize them to your tone and style; don't assume my words have to be used verbatim.

This is not a one-time read. I recommend you read this book over and over again.

Enjoy!

-Sara

LinkedIn messaging theory

Not everyone is going to respond to someone they meet on social media (especially if you are a financial advisor!), but there are certain things you can do to increase the likelihood of getting a response. Before you put to work the 47 messages I have created in this e-book, you should understand the philosophy of the messaging. Once you see what is behind a successful messaging approach, you will gain the ability to interact successfully on your own without even having to use my scripted messages.

Here are the foundations of a successful social media message:

- Two sentences only. Anything more and they have to scroll too much.
- First sentence is a statement and the second sentence is best a question or exclamation. Then shut up.
- Focus on one idea at a time.
- Don't give them too many options as for what you want them to do. There should be one clear call to action, and that's it.
- When appropriate, use emojis. 😊 Don't overdo it and be proper (no heart eye emojis, for example). It can lighten the conversation up and help you infuse more feeling into your words.
- Use the word "you" more often than the word "I."

The Golden Question

Before you click send, ask yourself the **Golden Question**:

If I were the person receiving this message, would I think this sounds too much like a financial advisor?

Any time you are sounding too much like a financial advisor, **delete the message** immediately. DO NOT click send. I don't want anyone reading this e-book going around saying crap like that anymore.

The Two Sentence Rule

I can't emphasize enough that **the message has to be two sentences long only**. It's not just about not making them scroll. The more important aspect of the **Two Sentence Rule** is that you want to avoid complex communications with someone you don't know.

- Make a simple point, and then wait for a response.
- Don't pitch
- Don't overcommunicate
- **Build the relationship one idea at a time, one interaction at a time.**

This is how communication over messaging apps is different from having a verbal conversation and it's important to grasp.

Don't be a washing machine salesperson

What is even more important than the words you use is your **intention** and sincerity. People want to feel spoken to like they are a living, breathing human being not just a digital page on the internet. **Your first intention is to understand the person.**

If you want to be seen as someone worthy of another person's trust, it is critical to avoid violating this rule:

Never ask for a meeting (or ask for anything, for that matter) without an understanding of why it would make sense for the person to meet with you. This cannot be assumed; interest **must be expressed directly by the person**. Don't get imaginative!

Remember that financial advisors who ask for a meeting before the prospect has expressed any need, desire, or curiosity to meet wind up looking like the washing machine salesperson.

The purpose of a LinkedIn message

Let's also go over what the purpose of a LinkedIn message is. **This is fundamental to your success in portraying yourself as a high-quality person on social media.**

It is to find out what specifically the person:

- Cares about
- May be curious about
- Has a problem with
- Or has an interest in knowing more about

Once you do that, you have a solid basis for getting the meeting set up. Without that, you are on shaky ground and the odds of you getting the meeting are lower.

Key point here:

The #1 point of a LinkedIn message is for the person to give you information about what they care about. The goal of being able to pitch, impress, get visibility, get a meeting, etc., is secondary to the #1 goal.

If you want to *close* a prospect on a meeting, it has to do with how you *open* the dialogue. The opening determines the closing, you see? But to get from the open to the close, the information has to flow freely over the messaging app. And when it does it'll be so natural that when you ask for the meeting, they'll say yes. Heck, they may even suggest it themselves.

Messages that allow information to flow freely between you and the prospect are:

- Thoughtful
- Curious
- Non assuming
- Sincere
- Reflective of your intrigue towards them
- Intelligent
- Surprising
- Brief
- Giving
- Reflective of information they already told you or that you read in their profile or elsewhere online

- Indicating a sincere intention to make their lives better without attachment to any self-serving particular outcome
- Making the prospect feel that you are different from the other washing machine salespeople posing as financial advisors, and that they have nothing to be afraid of

I know, I know. Why can't you just ask for the meeting and get the deal done? You need to eat, pay your mortgage, and send your kids to school, right!

Look, if you are going to form an image of yourself as being worthy of handling millions and millions of dollars of someone's money, you can't act like the washing machine salesperson.

Patience, people.

[Them not you](#)

I'll give you the specific words to say in a bit, but here are some ideas about ways you can engage someone you don't know instead of straight up asking for the meeting. All of the following methods are focused on THEM not on YOU.

Let me repeat that:

THEM NOT YOU

THEM NOT YOU

THEM nOt YoU

them not you

(them not you)

Ellos no tu (in spanish)

Loro no lei (in italian)

I mean, I really don't know how else I can express the idea of detaching from your agenda and focusing on theirs instead. In fact, they should feel like you are totally and utterly *intrigued* by them.

- Praise something **they** have said or done in their career or business
- Conjecture about something about **them**. “From army sergeant (first class) to history professor? Intriguing!”
- Describe something you see **them** doing. “I saw that you liked an update about my favorite singer from Kazakhstan...”
- Tell them you enjoyed something **they** posted, “I loved seeing...”

Still convinced you want to swoop in with the coffee meeting message like the SWAT team?

Don't do it.

I don't want anyone who took the time to read my stuff looking like a washing machine salesperson.

If you are in dire need of developing new business in a flash, pursue *more* prospects instead of trying to rush the ones you have. However, be careful not to sacrifice thoughtfulness and quality. If you increase volume of messages, you have to increase the time invested.

List of 20

You should have a **List of 20** people you are messaging at any given point. You're only messaging 20 people at a time and sending each person one message a week. Quality not quantity here.

Even 20 people is a challenge; you may have to start with just 10. I mean, do you know how hard it is to get to know 20 people? How many of you have 20 close friends? The only birthdays I can remember are my own, my mom, dad, brother, best friend, and kids' birthdays. I have even forgotten Antonio's birthday and he's the father of my four kids, for heaven's sake.

Whooooooooooooops! Did I say that?

Shame on me!

Sorry, Antonio.

The point is that you don't need a million people, you only need to know the right ones. **Don't waste your time sending meaningless messaging to anyone who looks like they have a dime; instead put forth well thought out, logical messages to no more than 20 people at any one time.**

This list is not static; it is dynamic. If somebody does not respond after three messages, then you should get them off the list. You can still come back to these unsold deals later (let's say six months from now). But for now, get someone *else* on the list in their place.

And then press the reset button!

Sequences

Create groups of three messages that lead from one to the other naturally. This is called a **sequence**. The goal of the sequence is to get the prospect to reveal enough information to eventually form the basis for a meeting to happen.

Focus on one sequence at a time. Messaging sequences should be like this:

- #1 message: two sentences and then shut up
- #2 message: two sentences and then shut up
- #3 message: two sentences and then shut up

Once you get a signal that the person has an interest, only then do have the right to ask for their time. Otherwise you risk getting ghosted on.

I said this in the last section, but I'll repeat it verbatim.

Never ask for a meeting without an understanding of why it would make sense for the person to meet with you. This cannot be assumed; interest **must be expressed directly by the person**. Don't get imaginative!

Keep track of all the messages you send. Intelligent and high-quality people remember what you said in the last conversation they had with you. It's no use firing out messages that don't make sense from one to the next, are repetitive, or reflect that the information you gained in the last interaction was not incorporated into the next one. This can make the conversation stilted and they'll ghost on you.

Summary of key points

Remember one false move and you're dead on LinkedIn messenger! It just takes one screwed up message for them to say "adios."

Advanced messaging tips:

- After three nonresponses, get them off list and find someone else
- Sequences should consist of two transition messages and then ask for the meeting if there is expressed interest
- If no interest is expressed after three messages, you have to do another sequence of three messages, but this time go in a different direction.

If you have to move into another sequence, do not send three more of the same type of message about the same thing. There was something you missed in the first sequence; don't miss it again.

Summary points:

- Group messages by three's into sequences
- Message once a week for three weeks
- No more than two sentences per message
- After three nonresponses from the same person, move them off your List of 20 and replace them with a better prospect.

Now - on to the messages!

Almost there. Before we jump into the messages, I want to remind you that each situation requires a different message.

- You want to connect with them but haven't
- You just connected with them
- You messaged a bit and they stalled
- They rejected you
- They connected but are totally silent
- They are a reporter
- They are a CPA
- They are a podcast host
- The market is in a crisis

I have different messages for all these scenarios. Financial advisors ask me what the “good” messages are to say on social media. This question reflects a crude understanding of human psychology. There is no one magic message that works on everyone. Every prospect is different and every situation is different.

47 financial advisor LinkedIn messages that won't make you look stupid

In the last section, I told you about the philosophy behind LinkedIn messages, and now I am going to give you the words to say.

Response to someone who asks you to connect

Often people will ask you to connect without a note or reason why. Always send them a message and find out why they did that. Why?

- If the person has put no thought into it, you want to know that.
- If they heard about you from a mutual connection, a talk you gave, or perhaps a COI who sent them your way, there is some credibility and possible interest.

Look at everyone's page after they ask you to connect. It will take you five seconds at most. You just never know what you'll see or what may be there for you to grab onto and start conversing about. Even if they don't seem the best prospect, it's worth it to just see what they are about. They may know somebody who is.

Isn't that the point of networking?

The idea of someone not "looking like they have money" from their LinkedIn profile is a ridiculous assumption. People don't usually disclose the whole story on their profile pages (on purpose). I mean, think about it. Who is going to write something on their LinkedIn profile like:

- Yesterday I inherited \$5MM from my father-in-law.
- I'm about to sell my business to Yahoo for 25 million dollars.
- My wife is threatening to divorce me if I don't appointment someone to take over our portfolio, because I lost half our money in the last market crash.
- I am personally in touch on a daily basis with half of the Fortune 500 executives in the United States.
- I just unexpectedly got a six-figure bonus and have no clue what to do with it.

Nobody does. So then how to you find out?

Starting a conversation with them will allow them to trust you more and if it goes well then eventually the truth will emerge.

I can't tell you how many times I wound up having something awesome happen for my business and it started from someone who appeared to have **absolutely no potential** to help me in any way. Sometimes it is a matter of them being giving people, other times it is because you took the time to get to know them and they grew to like you.

I am not telling you to sit there all day talking to people who have nothing to offer. Initiate the conversation when someone asks you to connect, see how it goes, and then move away if it seems to be going nowhere.

Advisors always say that the only people who want to talk to them on LinkedIn are vendors. Don't count them *all* out! Many of them are valuable gems!

Successful salespeople have fabulous networks, by the way, and they are some of the most generous, action-driven, and personable people I have known. Politely make it known that you are not interested in what they are offering but would like to remain a networking partner. The high-quality salespeople are great relationship developers and may still add value to your business. Just make sure you don't spend all day talking to them.

So, here you are and somebody has asked you to connect, and you have no idea why. Try these messages.

#1 The casual "Um, who are you?"

- Thanks for inviting me to connect. Did you find me through a mutual connection or was there something in my profile that happened to strike your interest?
- Thanks for inviting me to connect. Did you find me through a mutual connection or was it perhaps a talk I gave (an article I wrote, a post I shared, etc.)

#2 The blunt "Um, who are you?"

This is a bit more direct. Use this if you really don't see any real value in the connection and don't mind taking a risk being blunt to find out.

"Great to be in the network. What was your interest in connecting, if I may please ask?"

#3 When you have no clue

Use this if there isn't much information on the person's profile page.

"Hello (name) and thanks for asking me to join your network. What's new at (company name)?"

"Hello (name) and thanks for asking me to join your network. How can I help you with what you are trying to achieve professionally?"

Should you accept the connection from everyone who asks? Judge based upon if they included a sincere note. If they didn't include a note but are potentially a good contact anyways, or potentially have influence over a market you care about, consider accepting.

Should you accept a connection from other financial advisors? If your connections are hidden there is less risk of them trying to search through and steal your clients. If you are going to accept connections from other advisors you don't know, I would advise hiding your connections. Also consider that if you are going to connect with the competition, you are allowing them to spy on you, your posted ideas, and your news announcements.

My seventh-grade science teacher taught me this rule when we were selecting partners for the rock and mineral project:

In any partnership, the dumber person always benefits more.

In short, I wouldn't spend all day talking to other financial advisors. I would be selective and pay attention only to those you wish to emulate. It's most valuable to connect with other advisors if they have succeeded at something that you have not (yet desire to do so).

What if you start conversing and you find out they are not cool? Then you simply:

- Disconnect by removing them as a connection (use this if they are rude or unprofessional)
- Gradually let the convo fade by responding back with vague or bland responses
- Totally ghost and not respond at all

Connection requests

Before you can do any messaging back and forth, you've got to connect with the person.

Actually, you could use LinkedIn's InMail function to send messages without being connected, but you'd have to upgrade to be a premium member for that. Assuming you are not, here are some messages to send that will prompt the person to be more likely to accept your connection request.

By the way, after you send someone a connection request and they accept, it's a good idea to wait two days before you message them. Some people don't care but others may feel put off by getting huge attention from you right away.

#4 Casual acquaintance you already met

"Great to see you at the Chamber meeting yesterday and would love to be in the network."

"As per Jerome's introduction yesterday, it would be great to connect."

Right to the point and don't blab. If they liked you, they will accept without you having to dress it all up.

#5 If you have some common affiliation.

"I'm looking to connect with people who share a passion for the Bay Area startup scene, and it seems from your profile like this is an interest of yours. Would love to connect and compare notes."

Or

"I'm inspired by people who share a passion for the Bay Area startup scene, and it seems from your profile like this is an interest of yours. Would love to connect and compare notes."

Or

“Saw your post shared by a respected colleague of mine and would like to connect.” -Sara

This one is a good line because it creates just enough curiosity. Make sure there actually *is* a respected colleague who posted, like you said.

And in general, it’s good advice to not lie. Be genuine with these messages. If you’re not, it always shows in the long run.

#6 If you have no affiliation but they are a target prospect

“Every Tuesday, I publish news feed content about retirement for Delta employees that may be relevant to you. If you would like to receive my updates, it would be great to become connected.”

#7 If they are a COI

“I am looking to expand my roster of CPAs that could possibly help my clients. Would love to learn more about how you work with business owners (the niche I serve as well) in our local Memphis community.”

#8 If they are reading your newsletter

By the way, are you checking your opens and clicks when you send a newsletter?

If not, you should be.

It gives you valuable information about what is relevant to your audience. **Pay close attention if someone is consistently clicking on the links about one particular subject.**

Use this data to customize a message to them and get them following you on social media. Let’s say that you notice someone consistently clicking on the articles you write about Medicaid.

Example:

“Jeremy, I wanted to connect here on LinkedIn as my news feed content on the upcoming Medicaid changes may be useful to you. -Sara”

Transition Messages

You've made the initial connection request and the prospect is silent or near silent. They at least connected with you. That's a starting point. But where do you go from here?

Use these transition messages to get the conversation started. The more humorous you can be, the better. Be tactful with your jokes and stay away from the no-no's. Emojis are good to use here as they reflect a lighthearted tone.

Remember my earlier point about THEM not YOU:

- Praise something **they** have said or done in their career or business
- Conjecture about something about **them**. "From army sergeant (first class) to history professor? That's intriguing."
- Describe something you see **them** doing. "I saw that you liked an update about my favorite singer from Kazakhstan..."
- Tell them you enjoyed something **they** posted, "I loved seeing..."

Whatever you do, do NOT launch into some four-paragraph soliloquy about how you have worked for 20 years with clients like them, you are a fiduciary, and you would love to sit down for coffee and offer them a second set of eyes on their portfolio. These transition messages should leave them with the feeling that you are totally intrigued by the person. Remember the focus is THEM not YOU.

#9

"Wow, I just read your whole profile page: Chamber of Commerce, president of a company, United Way volunteering. Ever sleep?"

#10

"Whoa, I just read your whole profile page: Chamber of Commerce, president of a company, United Way volunteering. Ever take lunch?"

#11

Make a funny joke on yourself. To a fashion executive, for example, who runs a fashion networking group.

“Hey Anthony, where’s your fashion group for people who have NO fashion sense? Can I be the first member?”

#12

“WOW, just noticed you’ve been with Kraft Foods for 22 years. That’s a shocker in the ‘disposable job’ era - congratulations!”

#13

“Javiera, I’m doing some research on highly successful female executives and Social Security for an upcoming blog. What questions, if any, would a higher achieve (like you) have on this?”

#14

“Olivia, I was very touched by your posting on the Navy Seals last week. I work with a ton of military veterans and your point about their sacrifices was totally on point!”

#15

“Mikhail, I saw you are connected with my friend Sylvester with whom I went to high school. Are you also a Purdue alum or is it just random (insert goofy smile emoji)?”

Gentle (but direct) messages

Let's say you've messaged a bit, but still haven't been able to broach the topic of what you do for a living. These messages are a bit more direct, but the tone is humble and low key. Speak gently with people and whatever you do, no asking for coffee.

Remember that one false move and you're ghosted on social media.

#16 Prospect message

"I saw you work at Mazda. Before I send you a random blog post...Is there anything in the realm of what I do (financial advice for auto employees) that you are curious or puzzled by?"

#17 For a stalled prospect

Do this when you know the person is somewhat interested in the topic but for some reason doesn't seem to want to meet with you.

"Hi Bruce, I'm having a webinar tomorrow at 1 PM exclusively for my clients and wanted to know if you'd like to join as my guest."

The exclusivity – this is for your clients not just the average person – gives this message power.

#18 For a new prospect that you do not know a lot about.

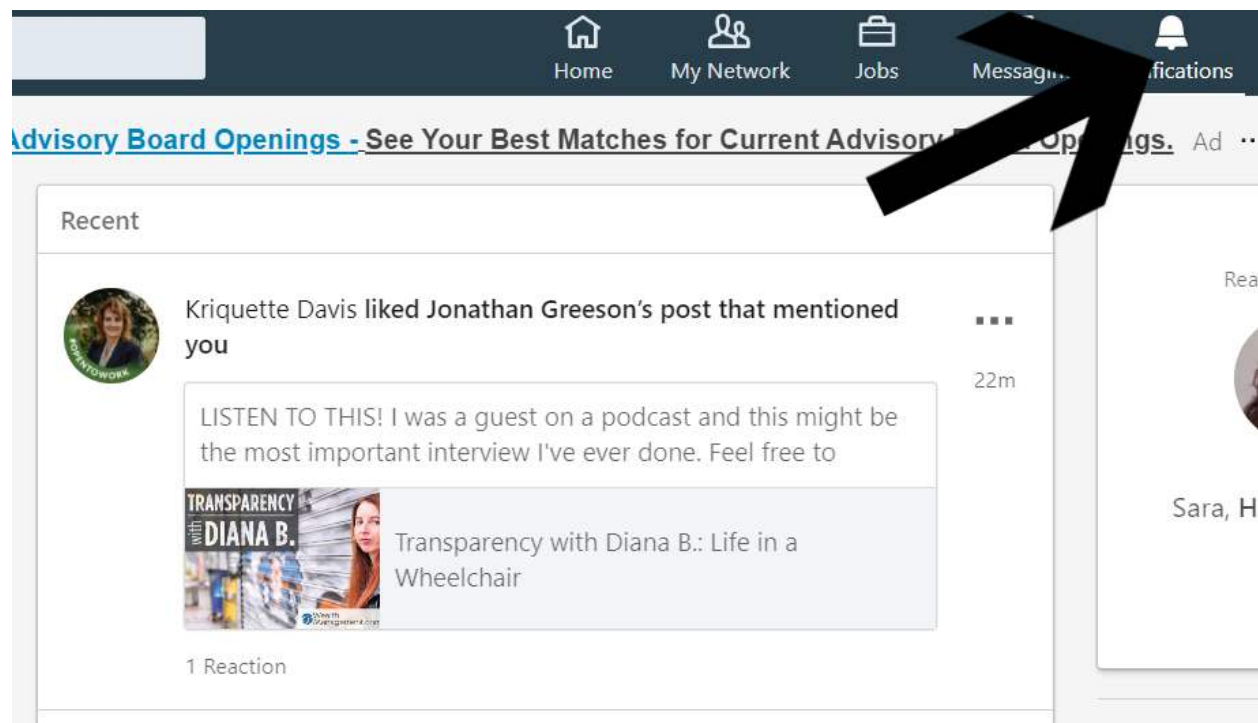
"Hi Jane, this may be useful to someone you know...wanted to pass it on. (insert blog post link about a topic likely to be relevant to them)"

#19 When you have other clients who work at their company and you know about their benefits package

"Reba, I heard the 401k plan guide for Betsy's Diamond company is written in Swahili (or was it Sanskrit). (smiley face emoji). Agree?"

Responding to notifications

This is a technique to use with the people who are your first-degree connections on LinkedIn. You have probably seen these notifications pop up in the right-hand corner of your screen, near the bell.



This means that someone in your network has had some kind of event like a promotion, birthday, etc. And what comes with that? Emotions do. Your messaging here should carry **high emotional value**.

Before I tell you what to say, I'm going to tell you what NOT to do:

- Do not behave like a typical financial advisor on social media.
- Don't pitch to meet about the IRA rollover once you see the notification come up that the person got a new job. Um, do I know you?
- Do not click the auto-respond message that LinkedIn inserts, like "Congratulations!" Oh, please. Everyone else is going to use those words, and you'll just look lazy.

Below are some creative messages to use. Maybe you don't want to use these exact words but the guidance is to use humor, be lighthearted and sincere, and keep it to two sentences or less. Emojis work great for these types of messages as they carry **emotional value** and the person is most likely excited about their event.

#20 Promotion

“Name, congratulations. What’s next on the agenda? Running for President?” (smiley face emoji)

#21 Work anniversary

“Name, congratulations on succeeding for another year at Boeing. Did they at least give you a cupcake at lunch?” (smiley face emoji)

#22 Birthday

“Name, happy birthday! What are you doing to celebrate – maybe taking a long lunch break (for the first time)?” (smiley face emoji)

#23 New Job

“Name, congratulations on your new job. So how long until you are running the place?” (smiley face emoji)

Bold messages to heat up a tough cookie

These messages are for the stubbornly silent prospect that you are a step away from abandoning. These are for cases in which you have had zero or little interaction in the past, and the person has put up a brick wall.

They are highly guarded because they:

- Think you are going to try to hard sell them
- Don't like financial advisors in general and ruled you out from the jump
- Already have a financial advisor but accepted your connection request because they see you as a distant back up plan
- Are DIYers who want to see your free content and make sure they aren't missing out on anything
- Have next to zero free time and can't pay attention to much else than their work

Whatever it is, match fire with fire. Use bold, blunt messages when dealing with a tough cookie.

The blunt tone of the messages has a very valuable purpose. In a sense, you are calling them out for ignoring you. Many of these tough cookies respect the chutzpah, and this can bring the walls down.

Some of the messages I recommend involve **taking the deal off the table** (temporarily) so that the prospect can feel more comfortable engaging. Remember one thing: **if you say the deal is off the table, you have to accept the fact the deal is off the table.** Let's say you get them to talk with you on the premise that you aren't going to ask the person for coffee at the end (as in the first message, for example). You *cannot* ask them for coffee no matter how tempted you may be.

Once you take the deal off the table, you are going to have to start from ground zero, literally from zero, just getting to know them as a person with no business agenda attached. You have

to temporarily detach from the idea of getting them to work with you. The hope is that in the long term they eventually come around.

There are cases where I've seen it go something like this.

- If they think you're cool when you talk, they may start following your posts.
- Maybe they'll throw you a "like" on a post here or there.
- You do the same back.
- You talk again in three months.
- Then a month later you invite them to a local charity event you're going to.
- Or you sign up for their newsletter and throw them a comment on it every few weeks.
- In a year they randomly reach out to ask you a question on something you wrote in your newsletter

Now you have a little back and forth going on and this interplay becomes the basis for your professional relationship. Make it so they **gradually** become aware of you and **slowly** start to open up to you. You'll have to be extremely patient and recognize that this may take a while. I've found that tough cookies are worth the effort. Remember that most of the high value people on LinkedIn are constantly pummeled by vendor messages, they're fed up, and you have to play the long game.

Here's why it pays off:

Someone who is highly guarded with *you* is the same way with *everyone else* (including your competition). These are usually highly loyal people. And that's why tough cookies make great clients!

The tough cookie messages are below.

Note: these messages are a bit dynamic and may provoke an emotional response. Remember, **you only use these as the last resort** when you have attempted several humble messages and they have not worked.

#24

This is a great one for taking the deal off the table.

“If I were to promise not to talk about what I do for a living, would you be open to having a five-minute phone conversation or am I totally written off because I’m a financial advisor?” (smiley laughing face emoji)

#25

“True or false: You currently have a financial advisor but accepted my connection request because you were curious if I have anything new/cool to say.” (thinking face emoji)

#26

“I don't want to be a nuisance. Would you be interested in spending five minutes talking if I promise to hold the meeting in the ‘no sales pitch zone’?” (smiley laughing face emoji)

#27

This one is really bold and may provoke an emotional response. However, due to the highly charged nature of this message, you are likely to get their attention.

“Forgive me for being so blunt, but I am sincerely curious what you see as the purpose of being connected to me here on LinkedIn?” (thinking face emoji)

#28 If there has been some communication in the past but they’ve gone totally radio silent

“I don't want to be a nuisance. We've messaged about your IRA...would you like to talk or should I just quit bugging you?” (smiley laughing face emoji)

#29

“True or false...99% of the messages you’ve gotten on LinkedIn this week have been from financial advisors trying to sell you something.” (smiley laughing face emoji)

Business owner messages

Business owners tend to be visible on social media and are great targets. Before you approach them, be sure to know everything about their company. Do a Google search, visit their website, check out their Twitter feed. Get obsessed; they will love it. Their company is often a source of pride to them and especially if they founded it, it's close to their heart.

#30

"Clarissa, love that team pic by the Rio Grande river. So nice to see what El Paso Wireless Goats is doing for our community."

#31

"Hi Betty, I was wondering if you'd like to be a guest on my podcast (blog, newsletter, speak at a seminar for my clients, etc.) sometime. My followers would love to hear the story about your road to fame as the #1 origami swan producer in the world."

#32 This one is a *gooooood* one.

"Elsa, I loved the article about your company in the *Journal* last week. Just giving you the heads up that I shared it with my networking group here in XYZ county."

#33

"Wanted to drop you a line to say I'm really enjoying your company's newsletter on turtles and tortoises in Nevada's river system. Tell me, do you write them yourself?"

#34 To a company founder

"Just wanted to say I'm fascinated by what you and the team are doing at Sheila Holiday Wine company. Would love to hear your founder story sometime."

#35

“I am figuring out my 401k webinar content for this quarter and would highly value your insight. What is the #1 thing your employees ask you about their benefits?”

Notice I avoided the term “wanted to pick your brain.” Do you know how unpleasant that sounds? I mean, who thought up this phrase and why did it become a part of our lexicon?

#36

“Lestor, are there any introductions you’re looking for? I encounter a fairly good amount of folks from our area in my travels and would be happy to support the growth of Lestor’s Sewing Machine Company.”

Influencer messages

Send these to an influencer (COI) such as an attorney, CPA, head of a trade organization, conference organizer, podcaster, or any online influencer with a following that you want to get in front of. Notice these messages are in the spirit of **understanding** them and **giving** them something that will help make *them* more successful with the group they are influencing.

THEM NOT YOU

Remember?

But before we get into it, a note about how to approach media influencers.

Here's the summary of what I am going to say: **do not pitch some idea to an influencer before you know anything about how they operate.**

Reporters, authors, podcasters, and media influencers with a good following get pitched to all day long. Trust me, I know. They hate blind pitches that reflect zero understanding of their work. **But they *love* to hear from a dedicated follower who genuinely appreciates and praises their content.**

Reporters also love it when someone offers to be a resource to them. They operate under tight deadlines and are pressed to find good people to quote.

Don't look at it as most people do:

- You want the reporter to quote you on what you want to talk about
- You want to be quoted right now, point blank, period
- You want the reporter to make you famous so you can buy yourself a green Lambo

Instead, adopt the attitude that **you want to make the reporter more successful** by being there as an awesome resource whenever *they* need you.

THEM NOT YOU.

#37 Reporter message

“I’m a long-term follower of your writings and especially enjoyed the piece about NYC construction law changes. Please consider me a resource if you need information from my realm (finance for construction workers) to support any of your articles.”

#38 Conference planner messages

“I’ve always loved the Baby Billy Bathtub annual conference. Before I send you over some speech pitch that may or may not be relevant or welcome, is there any topic that you are looking for someone to speak about this year, but just can’t seem to find the right person?”

#39 Podcast host message

“I’m a long-term follower of your show and loved your episode about the parallels between the top *Miami Vice* episodes and healthcare reform. Before I send you over some podcast pitch that may or may not be relevant, let me ask you if you are open to hearing a topic I think may work for your show?”

#40 CPA message

“Laura, I see that you’re a person of influence in the accounting space and was curious if you were open to a few comments on your latest newsletter.”

#41 Podcast host or influential blogger

“Hi Vadim, I just listened to your awesome podcast about entrepreneurship finance. Would you be open to a few ideas that you might want to include in future shows?”

#42 Youtuber

“Hans, I loved the last YouTube video on the legal implications of divorcing during a pandemic. Would it be okay with you if I shared a few thoughts that came to mind as I watched?”

Crisis Messages

I wrote this in March 2020 when the market was crashing; these messages can be used any time there is high market volatility or any destabilizing event.

#43 To a business owner

“So, let me guess...you and your team are about to OD under pressure right now? (stressed out emoji) If you think it would be helpful, I’m having a webinar on Wednesday about how to handle market instability (without losing your mind).”

#44 To a prospect

“I was curious...what do you see as the biggest financial issue to result from this crisis (that people aren’t really talking about in the news)?

#45 To a prospect

“Uncertain markets are often a good opportunity for people to rethink their financial plan. Has this crossed your mind at all or have you buried the statements under the mattress?” (laughing emoji)”

#46 To a prospect

“Curious, did this market crash cause you to throw your financial plan out the window? Or did you just merely put it through the shredder...” (laughing emoji)

#47 To a reporter

“Loved your recent article on people going bankrupt in retirement due to market volatility. Did you know that (insert some jaw dropping fact)?

#48 To a prospect or COI

The power of this message is the power of exclusivity – you mention that this is restricted to your clients.

“I’m having a webinar on market volatility this Tuesday for my clients. Would you care to join as my guest?”

#49 To a CPA or other COI

“If I had to guess, I would imagine that your phone is blowing up from worried clients right now. Would you have 20 minutes to discuss what you are hearing and the best ways to respond?”

Rebuttals

Financial advisors, as an industry, have made a terrible reputation for themselves with the population at large. When someone rejects you over LinkedIn, it's safe to say that it probably has *less* to do with them not wanting to do business with *you*. It probably has more to do with them being annoyed at the constant barrage of financial advisor messages they get on the regular.

Rejection over LinkedIn is often the prospect's **instinct**. It is based upon feeling, not logic.

The problem is essentially that you appear **valueless** in their eyes because they don't know you. They will reject you without thinking twice because they don't see you as **different and better**. It's **up to you** to prove that you're not like the financial advisor who contacted them yesterday and you aren't like the one who will contact them tomorrow.

What is the objective of a rebuttal?

The objective of a rebuttal is to give them the chance to realize that you are different. It's not to get the meeting. It's not to get the sale. It's not to win them over. It's to **give them information that gets them to think twice about rejecting you** and to doubt that they made the correct choice.

Rebuttals do not always work. But I see far too many good financial advisors letting the right prospects slip away just because they don't know how to stick up for themselves and ask for the chance to show their value.

You ask for the meeting or merely just try to start up a conversation with them. They say "no" or provide some wishy-washy response back.

Use these rebuttals.

#50

Here you are trying to get information about whether it is just the wrong time, or if they have a real objection to being in touch with you.

“Understood. Is it okay if I contact you again in 5-6 months or should I mark this dialogue as ‘inactive?’”

They say: Stay in touch

Great! When I reach back out, which type of information would be of highest value—retirement, investments, financial planning, or something else?

They say: Inactive

“Done! But before I go, any feedback about what caused you to feel this way?”

With the following messages, you are trying to make the prospect think about why they are rejecting you. By causing the prospect to justify their response you are trying to make them see that it really doesn't make sense. Many times, by asking for feedback in a constructive way, the prospect ends up coming back around.

#51

“If I may ask, would you be so kind as to provide me with any feedback as to why you feel this way? It would really help me in the future.”

#52

“If I may ask, is it because it's somewhat uncomfortable to talk about finances with someone you just met online...Or is it perhaps another reason?”

#53

“If I may ask, is that because you already have a financial advisor you are happy with, or is there another reason you feel this way?”

#54

This rebuttal is bold. You’re essentially calling out the fact that you haven’t been given a real chance to establish value in their eyes. This is to be used when you are confident that you can actually add value to the particular person you are talking about.

“I totally understand you not wanting to engage at this point - we haven’t even had a real conversation. How about we talk for five minutes to get a sense for whether or not anything I do could actually be of any value to you, and then reassess?” (thinking face emoji)

Sequences

As discussed in the “LinkedIn messaging theory” section of this e-book, you organize your messages into groups of three messages that lead from one to the other naturally. This is called a sequence. You’ll need to make your own sequences; here are two examples.

Sequence #1: Content offering

“Name, every Tuesday I publish content on finance for IBM executives and thought it may be useful to you. If you feel the same way then let’s connect.”

(They accept – wait two days)

“Name, thought you might enjoy watching my upcoming video series on IBM. Would you like me to add your email to the list?”

They say: Yes

“Done. Can you please give me a heads up on which aspects of your benefits you'd be most curious to learn more about (401k, deferred comp, ESPP, etc.)?”

They tell you what they want to know more about.

“I can send you a blog that clarifies the really tricky parts of XYZ, but to most it appears to be written in ancient Sanskrit. It may be better to talk for a few.”

They say: Just send it

“Great, what’s your best email address?”

They say: Let’s talk.

“Great. Are you free Tuesday or is Thursday better at 10 AM ET?”

Or -

“Name, thought you might enjoy watching my upcoming video series on IBM. Would you like me to add your email to the list?”

They say: No

“Gotcha. Is it okay to contact you again in 5-6 months or would you like me to mark this dialogue as ‘inactive’?”

They say: Stay in touch

“Great! When I reach back out, which type of information would be of highest value—retirement, investments, financial planning, or something else?”

They say: Inactive

“Done! But before I go, any feedback about what caused you to feel this way?”

Sequence #2: Noticed on your profile

“Name, every Tuesday I publish content on finance for Mazda executives and thought it may be useful. Let’s connect.”

(They accept – wait two days)

“Name, I noticed that you have been with the company for ten years. What do you like about Mazda that has made you stay for so long?”

(They respond with something meaningful.)

You say: “Funny you should say that because most of the Mazda people I know say (something similar, different, whatever). They also tell me that the Deferred Compensation Guide is written in Swahili – agree? (laughing emoji).”

They say: I’m good. I already have it covered.

You say: “I wrote an article that clarifies the really tricky and lesser known aspects of the Mazda DCP such as (say something they **for sure** don’t know, like an esoteric tax term). Would you want to check it out just in case?”

They say: Yes.

“I can send you the blog, but to most it appears to be written in ancient Sanskrit. It may be better to talk for a few.”

They say: Just send it

“Great, what’s your best email address?”

They say: Let’s talk.

“Great. Are you free Tuesday or is Thursday better at 10 AM ET?”

Or-

You say: “Funny you should say that because most of the Mazda people I know say (something similar, different, whatever). They also tell me that the Deferred Compensation Guide is written in Swahili – agree? (laughing emoji).

They say: Yes, it is confusing/I don’t know what the DCP guide is/Never read it

You say: “I wrote an article that clarifies the really tricky and lesser known aspects of the Mazda DCP. Would you like to check it out?”

They say: Yes

Use the “yes” response from above.

They say: No/I am not interested.

“Gotcha. Is it okay to contact you again in 5-6 months, or would you like me to mark this dialogue as ‘inactive’?”

They say: Stay in touch

“Great! When I reach back out, which type of information would be of highest value– retirement, investments, financial planning, or something else?”

They say: Inactive

“Done! But before I go, any feedback about what caused you to feel this way?”

Conclusion

Whoops...I gave you 54 messages instead of 47 (as per the title). No extra charge for the extra seven messages.

Which message did you like the best? Message me on LinkedIn and let me know. Just make sure you keep it to two sentences!

-Sara



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