

Fall Webinar Series

Building Better Banking Relationships

vertical IQ[®]



Save time, boost your confidence and sales, and develop stronger client relationships with Vertical IQ.

Kevin McNamara, President
kmcnamara@verticaliq.com

Increase Your Sales Performance by Leveraging LinkedIn



*Jack Hubbard,
Chairman,
Chief Sales Officer,
St. Meyer & Hubbard*

Building Better Banking Relationships

vertical IQ[®] 



Becoming LinkedIn-Licious...

The Little Things

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St. Meyer
& Hubbard 



LinkedIn Fast Facts

- 450 million members – 128 million in the US
- 37% - the percentage of the US population reached by LinkedIn
- 41% - the percentage of millionaires on LinkedIn
- 13% - the percentage of US daily users (1.7 million)
- 130,000 – the average number of posts published weekly
- 4 million – the number of business home pages on LinkedIn
- 2.2 million – the number of LinkedIn Groups
- 930 – the average number of connections CEOs have



Little Ideas, Big LinkedIn-Licious Results

- How do I know I am successful on LinkedIn?
 - We can keep score
- How look able is my profile?
 - Eye popping background
 - Unique headline and professional photo
 - Custom URL
 - Outward feeling summary (Less that 25% have)
 - Skills/interests moved under Summary
- Am I connecting to the right people?
 - Connections customized (from your laptop)
 - Thank new connections
 - Connections to conversations
 - Tags to segment them



Little Ideas, Big LinkedIn-Licious Results

- What Groups have I joined?
 - National, regional, local, banking
 - Active
 - Messaging
- How often am I sharing, posting and publishing?
 - Building Mind Share
- What companies am I following?
 - Your bank, competitors, clients, prospects, COIs
- Have I invested in myself with Premium or Sales Navigator
- What is my LinkedIn rhythm?
- What is my LinkedIn philosophy – why am I there?





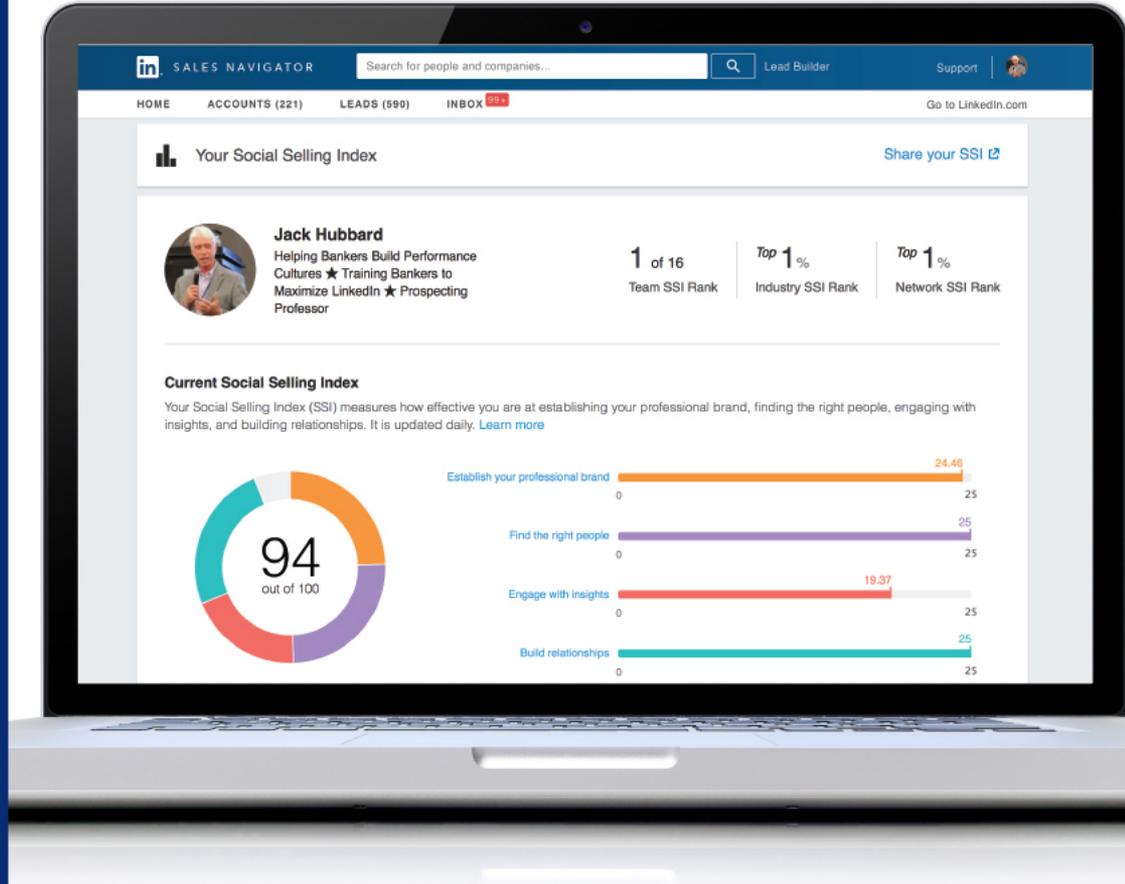
It Starts with Your Social Media Policy

- Confidentiality
- Privacy
- Honesty
- Disclaimers
- Respect
- Protect
- Ambassadorship



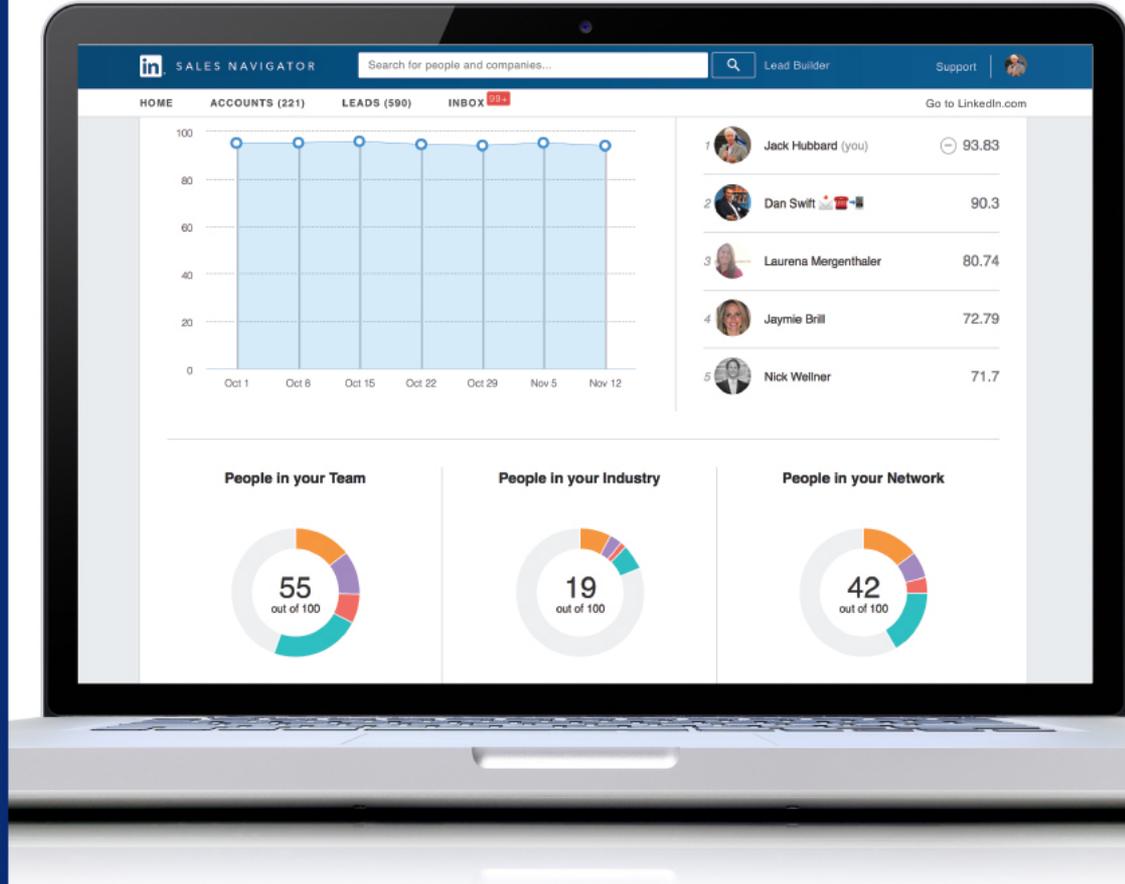
Social Selling Index – Behavioral Success

www.linkedin.com/sales/ssi



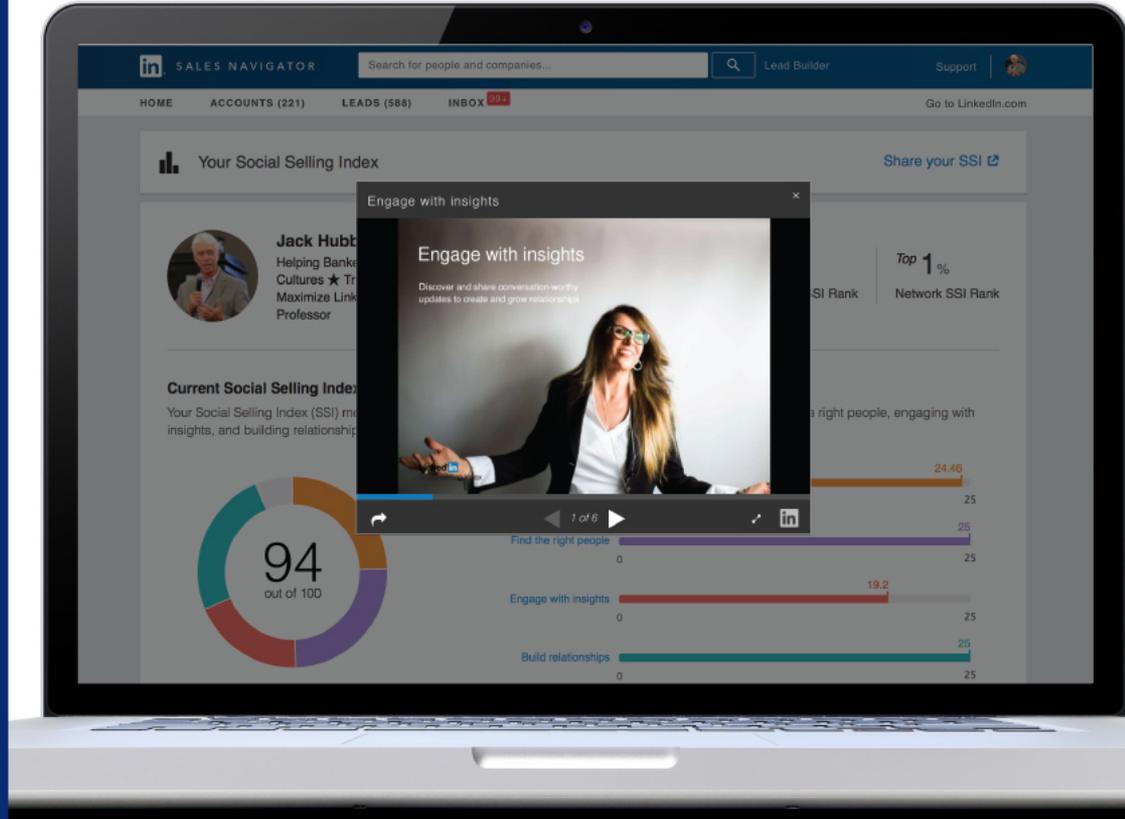
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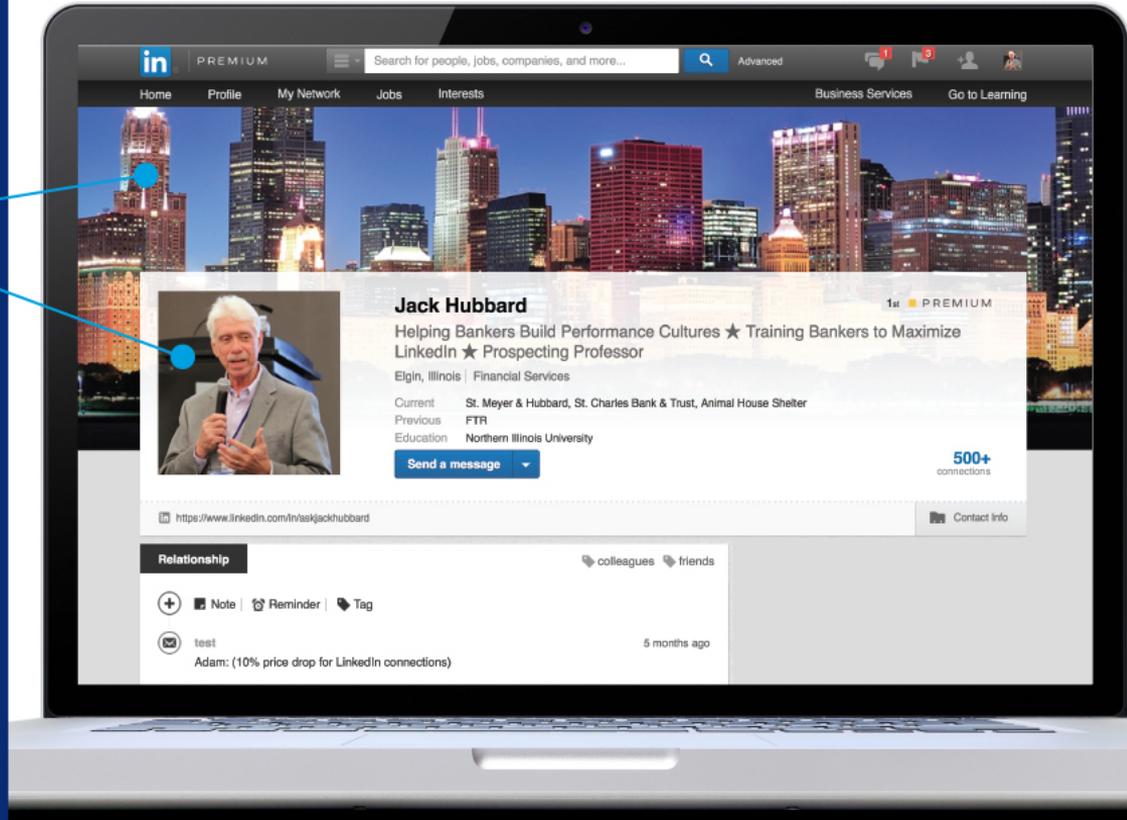
Maximize Your Profile

- Become an All-Star
 1. Add a profile photo
 2. List two or more positions you've held, with role descriptions
 3. Have five or more skills on your profile
 4. Write a summary about yourself
 5. Fill out your industry and postal/zip code
 6. Add where you went to school
 7. Have 50 or more connections
- Background photo makes you pop
- Photo, headline, URL
- Use 3-2-1- Summary approach with call to action
- Move Endorsements under Summary
- Make Interests More Visible



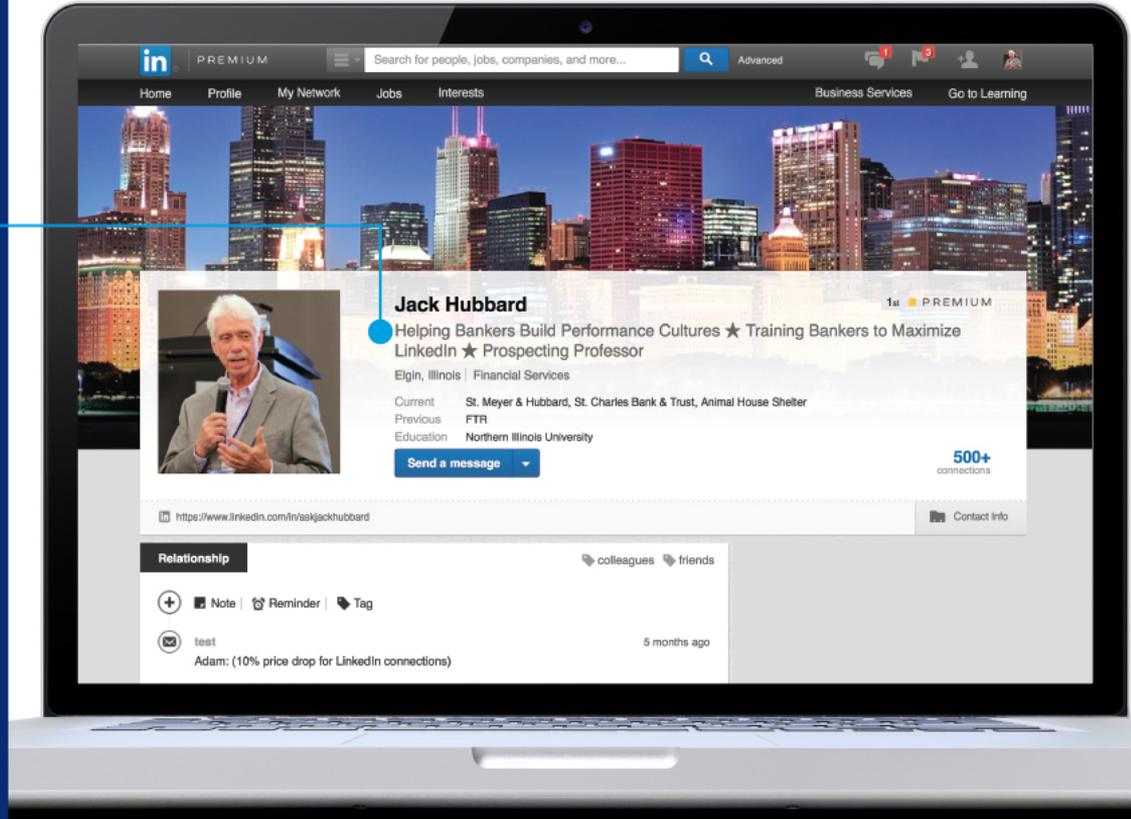
Photo, Headline, URL

Profile Photo



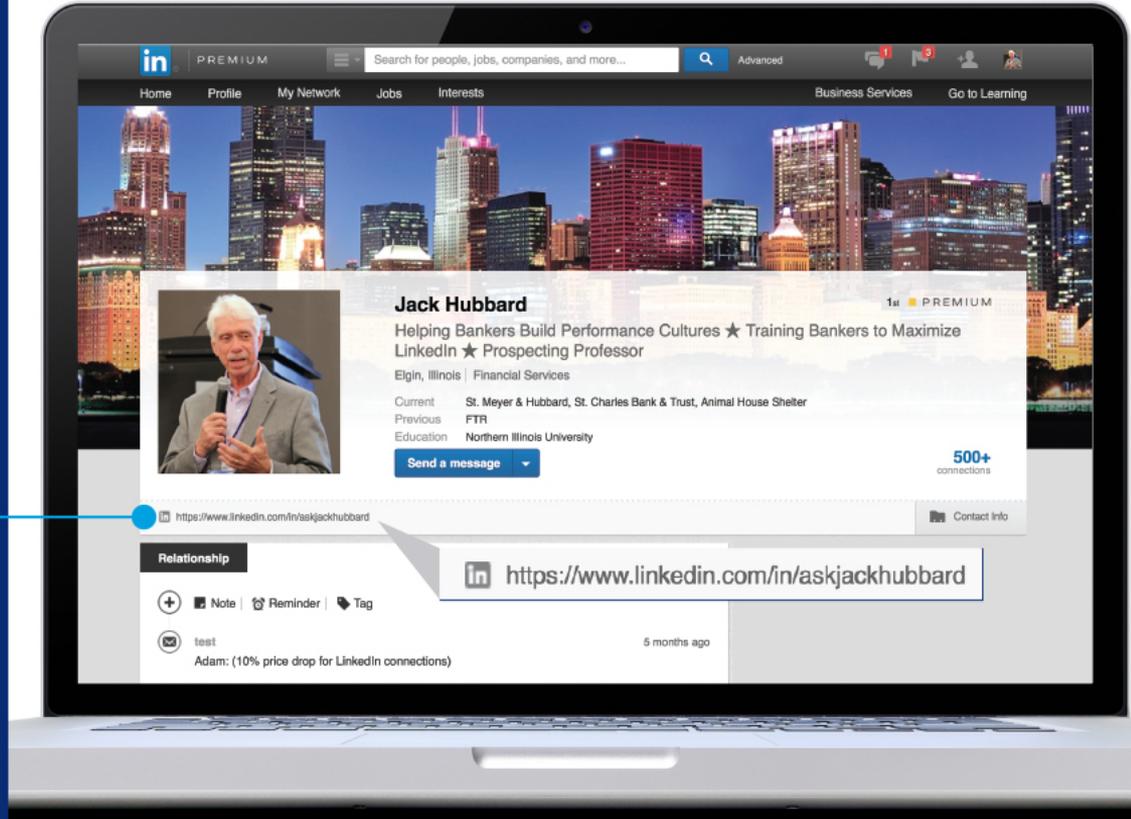
Photo, Headline, URL

Headline



Photo, Headline, URL

Personal URL



Unicode & Emojis

The screenshot shows the 'Unicode@ character table' website. At the top left is the 'UT' logo. To its right is the text 'Unicode@ character table'. Further right is a search bar with the placeholder text 'Character search' and a magnifying glass icon. Below the search bar is an example: 'Example: hammer and sickle'. Below the search bar is a section titled 'Most popular characters' which contains a horizontal row of 15 icons: a heart, a checkmark, a sun, a star, an umbrella, a bird, a yin-yang symbol, a scythe, a skull, a Euro symbol, a telephone, an infinity symbol, a snowflake, a musical note, and a Euro symbol. Below this row is a large grid of various emojis and symbols, including faces with different expressions, animals, food, and objects.



Summary – Use the 2,000 Characters



Summary

When I was six, my parents gave me a great gift that has made a lasting difference – a reel to reel tape recorder. That, and a passion for sports began my life's quest to be the play-by-play voice of the Chicago Cubs. Bad news; guys named Brickhouse and Caray got there first. Good news; I found my way to community banking and that tape recorder was just the tool I needed to help launch a career where I would personally train and coach more than 68,000 bankers in 49 states since 1973.

"Hire him...hire him now. Jack Hubbard helped us increase loans and deposits by more than 250% in eight months. His outside the box thinking and his energy are contagious. He is the best sales trainer I've ever experienced—practical, helpful, a true partner."
Executive Vice President, Regional Bank

I returned in 2016 for my 31st year at ABA's School of Bank Marketing and Management and my 16th at ABA's Stonier Graduate School of Banking. I'll also be back at Pennsylvania School of Commercial Banking, Perry School of Banking and Graduate School of Banking in Madison, WI too.

"Jack was by far the best teacher this week. Amazing takeaways - I couldn't write fast enough. How he kept this huge room engaged for three hours is beyond me. The time flew by."
Banking school student

I am committed to help bankers migrate to a Resource Management mindset - a proactive, value-based approach that turns customers into lifetime disciples.

My articles also appear in: "RAINToday," "Financial Brand," "RMA Journal" and others. I wrote "Conversations with Prospects", the book that has become the standard for bank prospecting strategies.

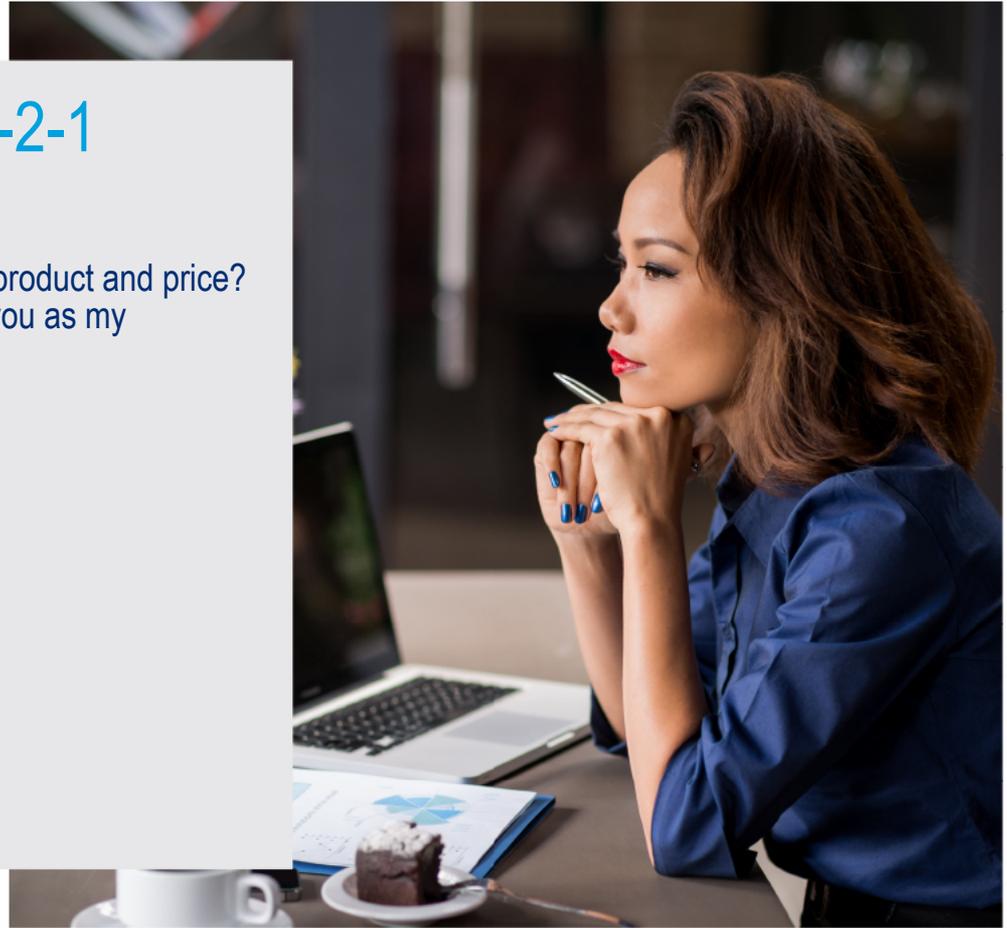
I am a member of the Board of Directors of St. Charles Bank & Trust, and serve on the Board of Directors of Animal House Rescue in Huntley, Illinois.

Need a one day sales program about prospecting, using LinkedIn more effectively or Becoming a Resource Manager? Call me at 847-717-4328 or reach out at jhubbard@smandh.com.



Outside In Summary Using 3-2-1

- Ask your top three clients:
 - Why did you choose me and my bank?
 - What value do I bring to the table beyond product and price?
 - What would you tell someone who called you as my reference?
- Ask your boss/manager:
 - Why did you hire me?
 - Why did you promote me?
- Ask your spouse/significant other:
 - What are my personal strengths?
- Use these bullet points and:
 - You write your summary
 - Your marketing department writes it
 - You pay someone to write it





Skills/Endorsements

- First level connections can endorse
- LinkedIn assigns them – you customize them
- You can have 50
- Move them to prominence – under your Summary

Move Them Up



Skills

Top Skills

22	Resource Management	+	
19	LinkedIn Training for...	+	
10	Prospecting Professor	+	
27	Sales Prospecting	+	
32	Public Speaking	+	
99+	Commercial Banking	+	
99+	Banking	+	
99+	Sales	+	
99+	Sales Management	+	
91	Training	+	



Customize Them

Skills and Endorsements Settings

I want to be endorsed Yes No

- Include me in endorsement suggestions to my connections
- Show me suggestions to endorse my connections
- Send me notifications via email when my connections endorse me

Add & Remove | **Manage Endorsements**

What are your areas of expertise?

You can still add: 22

- 22 Resource Management X
- 19 LinkedIn Training for bankers X
- 10 Prospecting Professor X
- 27 Sales Prospecting X
- 32 Public Speaking X
- 99+ Commercial Banking X
- 99+ Banking X
- 99+ Sales X
- 99+ Sales Management X
- 91 Training X
- 99+ CRM X
- 99+ Commercial Lending X
- 83 Retail Banking X
- 99+ Strategy X
- 81 Business Development X
- 99+ Leadership X
- 23 Selling Skills X
- 53 Relationship Management X





Join Groups

- Open and private types
- 100 opportunities to find and be found
- Group members are clients, pre-clients, COIs, etc.
- Lots of ideas and success practices
- Creates mind share and thought leadership
- Send 15 free 1:1 messages to group members monthly



Your Groups

The screenshot displays the LinkedIn 'My Groups' interface. At the top, navigation links include Home, Profile, My Network, Learning, Jobs, Interests, Business Services, and Go to Sales Navigator. Below the navigation bar, the page title 'My Groups' is accompanied by a 'Discover' button and a settings gear icon. The main heading reads 'Today's highlights' with the subtitle 'A personalized selection of conversations from your groups'. The primary content is a post from the 'Sales Best Practices' group, dated 3 days ago. The post title is '"Forecasting" top of mind? Forecast Accuracy is where nothing can hide'. The text of the post states: 'I've been pinged on this topic frequently as of late (probably FY2017 planning) so I thought it could be helpful to revenue leaders. If valuable, please like+share. gogogo, Mitch'. The author is identified as Mitch Morando, CEO @ Whalr, with the bio 'Moneyball for SaaS Sales'. Below the text is a video thumbnail showing a man speaking. The video caption reads: '"Forecasting" in quotation marks because you're doing it wrong. FORECAST ACCURACY is the correct KPI. Attn: Chief Revenue Officers, CEOs, COOs, VP Sales Sales Wound #74: "Forecasting" vs Forecast Accuracy The "Forecasting" methodolog...'. To the right of the post, a section titled 'YOUR MOST ACTIVE GROUPS' lists several groups with their respective conversation counts for the day: Innovative Marketing, PR, Sales & Soci (140), Social Media Today (79), Insurance Professionals (46), Sales Management Executives (38), and Banking & FinTech Connect (30).



Your Groups

Home Profile My Network Learning Jobs Interests Business Services Go to Sales Navigator

Groups Order and Display

Choose the order in which groups are displayed on your profile. To change your settings for a particular group, click "Member Settings" for that group below.

Groups (63)

Order	Group Name	
1	Business Banking Network	Manager Settings Member Settings
2	Core Banking Experts (Pending)	
3	Financial Social Media Marketing (Pending)	
4	American Banker Discussion Group	Member Settings
5	American Bankers Association (ABA)	Member Settings
6	ATD Sales Enablement Community	Member Settings
7	B2B Financial Services Content Marketing	Member Settings
8	BAI	Member Settings
9	Bank and Financial Services Marketing	Member Settings
10	Bank Director	Member Settings
11	Bank Managers	Member Settings
12	Bank professionals	Member Settings
13	Bank Training Network	Member Settings
14	Banking & FinTech Connect	Member Settings
15	Best Friends Animal Society	Member Settings
16	Banking and Financial Services Professionals	Member Settings



Share, Post, Publish

- Find a article to share daily with your groups
- Find one article a week to post on your home page
- Write one relevant article monthly to publish

This

- Creates personal brand awareness
- Improves thought leadership stature
- Enhances Google presence
- Adds deposits to your Content Bank Account



Share

Home Profile My Network Learning Jobs Interests Business Services Go to Sales Navigator

My Groups Discover Search

 American Bankers Association
Building Success. Together

American Bankers Association (ABA)

68,386 members Member

 Start a conversation with your group

Enter a conversation title...

[Conversations](#) [Jobs](#)

 **Jack Hubbard** 2d
Helping Bankers Build Performance Cultures ★ Training Bankers to Ma...

A precursor to coaching

Great coaching always has a starting point. Observations are critical as are collegial one on ones. This is a very practical article on how to conduct them for all levels of your organization.

 How to Make Your One-on-Ones with Employees More

MEMBERS 68,386 members

 Invite others



Post

in Search for people, jobs, companies, and more... Advanced 996+ 1

Home Profile My Network Learning Jobs Interests Business Services Go to Sales Navigator

Jack Hubbard Helping Bankers Build Performance Cultures ★ Training Bankers to Maximize LinkedIn ★ Prospecting Professor 6,847 followers

Recent Activity (176) Published (8) Drafts Followers (6,847)

Jack Hubbard Helping Bankers Build Performance Cultures ★ Training Bankers to Maximize Lin... 2h

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Great coaching always has a starting point. Observations are critical as are collegial one on ones. This is a very practical article on how to conduct them for all levels of your organization. <http://bit.ly/2fLnRnA>

How to Make Your One-on-Ones with Employees More Productive
hbr.org • They shouldn't be hurried or disorganized.

Like • Comment • Share • 7

Jack Hubbard started a group discussion 2h

Community Bank Group Member

How top sales bankers can mirror world class brands
Seven great ideas, one outstanding book and a pinch of evangelism in this must read HBR article.

Like • Comment



Publish

Posts

Published by Jack
See more ▶

6,847
followers



What Taylor Can Teach Us About LinkedIn

November 2, 2016



One Bank's Approach to a Happy New Year

October 12, 2016



What Did You Do on Your Summer Vacation?

September 22, 2016

Background



Summary

When I was six, my parents gave me a great gift that has made a lasting difference – a reel to reel tape recorder. That, and a passion for sports began my life's quest to be the play-by-play voice of the Chicago



Creating and Using Tags

- Tags are simple keywords that organize your first level connections in LinkedIn.
- You can create up to 200 Tag categories.
- Tag your connections that fall into a specific category and label that category. For example:
 - Clients
 - COIs
 - Industries
 - Alumni
 - Accountants
 - Prospects
 - Internal Partners
 - Associations
 - Attorneys
 - Insurance Agents
- One contact can be “tagged” into more than one category. For example, you may tag someone as a “client” and as an “attorney.”
- To “tag” a contact, click “Connections” under “My Network.” Hover over your contact’s name, then select “Tag” below their information. The tag drop down box will appear. Click the appropriate tag or tags and your selections are automatically saved.



Tagging – the Unique 200

The screenshot shows the LinkedIn tagging interface for a user named Jane Banker. The interface is divided into a left sidebar with a list of tags and a main area with a list of tagged contacts.

Left Sidebar (Tag List):

- Association Partner
- Attorney
- Author
- Business Banking
- Consultant
- Executive Management
- Finance
- Human Resources
- IT
- Insurance
- Marketing
- Mortgage
- Operations
- Platinum
- Public invitee
- Reference
- Retail Banking
- Sales
- Saved_Contacts
- Training
- Treasury Management
- Wealth Management
- [+ Add New Tags](#)
- [Manage Tags](#)

Main Area (Tagged Contacts):

- Jane Banker** (VP Branch Sales & Customer Service at ABC Bank, Schaumburg, Illinois)
Public invitee Retail Banking Sales
Tag Message Remove
- Associations Coordinator at Community Bank**
- County Bank**
- Company**
- THY MARKETING GROUP**
- First Federal**
- Mortgage**



Why Sales Navigator

		LINKEDIN FREE	PREMIUM BUSINESS PLUS	SALES NAVIGATOR PROFESSIONAL	SALES NAVIGATOR TEAM
See when prospects check you out	Who's Viewed My Profile	Last 5 people	Last 90 days	Last 90 days	Last 90 days
Reach prospects directly	InMails (per month)	-	15	15	30
Find the right leads and accounts	Extended LinkedIn Network Access	-	√	√	√
	Advanced Sales-Specific Search Tools	-	-	√	√
	Automatic Lead & Account Recommendations	-	-	√	√
	Territory Preferences	-	-	√	√
Stay organized and up-to-date on leads & accounts you're interested in	Job Change Alerts	-	-	√	√
	Prospect & Company News Alerts	-	-	√	√
	Notes & Tags	-	-	√	√
Training and education	Learning Center	-	-	√	√
Leverage LinkedIn wherever you work	Dedicated Mobile App	-	-	√	√
	Salesforce and Microsoft Dynamics Widgets	-	-	-	√
	Salesforce Import & Sync	-	-	-	√
Access the entire LinkedIn network	Out-of-Network Unlocks (per month)	-	-	-	25
Unlock the power of your company's social graph	Warm Introductions through TeamLink	-	-	-	√
Enterprise Capabilities	Seat Management	-	-	-	√
	Usage Reporting	-	-	-	√
Billing and Support	Volume and Multi-Year Discounts	-	-	-	√
	Invoicing	-	-	-	√
	Dedicated Relationship Manager	-	-	-	√



What Taylor Teaches Us About Routines

Daily

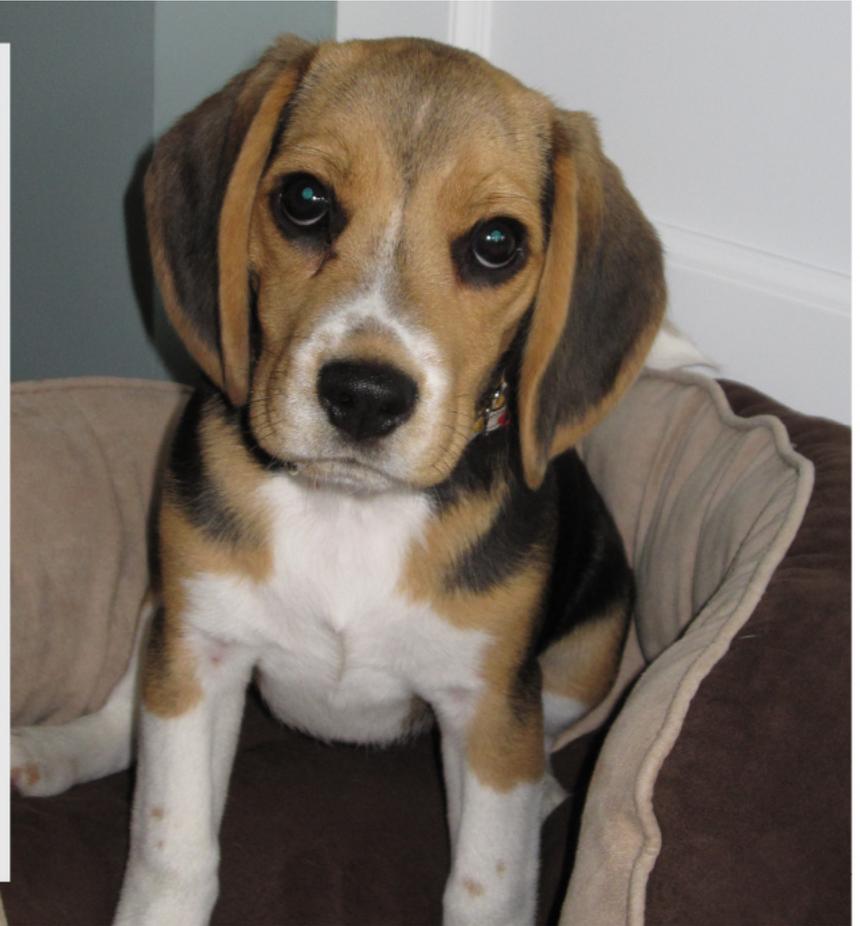
- Review SSI score
- Review Keep in Touch (Skip, Like, Message, Personal Message)
- Review who has seen my profile (click on theirs depending on my criteria)
- Review key metrics on Sales Navigator
- Check Pending invitation requests (Accept or Reject)
- Send personal message to accepted connection requests
- Bring up three articles (sales, leadership, marketing) to share during the day
- Connect with three new people



What Taylor Teaches Us About Routines

Weekly

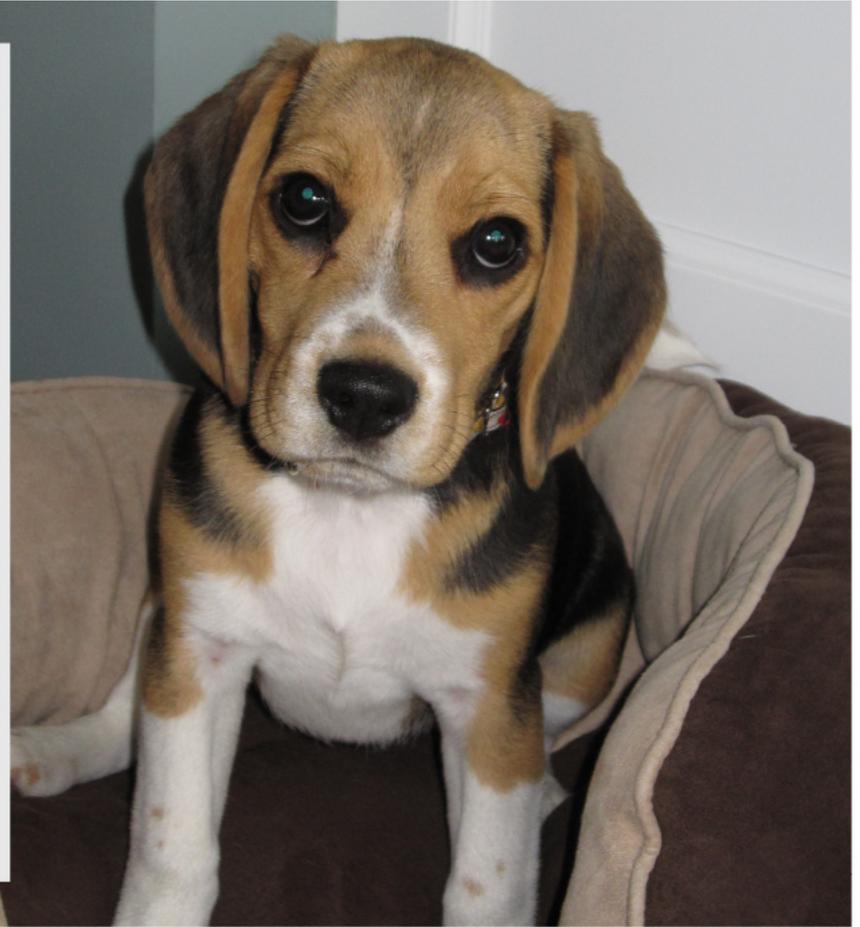
- Find an article to post (three days weekly)
- Tag new connections for the week



What Taylor Teaches Us About Routines

Monthly

- Update key areas of profile
- Publish article





Time to be LinkedIn-Licious...

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Build Better Relationships

Try Out Vertical IQ
One Month Free Trial

Kevin McNamara, President
kmcnamara@verticaliq.com

The Bar is Low, the Opportunity is High: Myths and Realities about a Trusted Advisor Strategy



*Nick Miller, President
Clarity Advantage
Corporation*

*Tuesday, November 29
12 p.m. Eastern, 9 a.m. Pacific*

Building Better Banking Relationships

vertical IQ[®] 

Thank You for attending
Building Better Banking Relationships

Kevin McNamara, President

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