

Best Practices for Achieving Your Social Media Goals

Goal	What to do	Why to do it
Become a thought-leader/influencer	Add to discussions about timely topics that are relevant to your area of expertise by sharing a thoughtful opinion or insight	Engaging with others can help to get your opinions heard and sought out
	Publish insightful content on a regular basis	Posting several engaging posts over the course of a month will have a better ROI than posting daily just to make an appearance
Position yourself and build your brand	When sharing posts and articles, write and include your own caption	By putting the post in context for your followers, you can reinforce your core messages and positioning
	Post consistently (with a regular cadence)	Nothing damages a brand like not meeting expectations. Better to post on a regular cadence, even if that's less frequently than you can sometimes manage, than to start out posting every day and then drop off when you get busy
	Be judicious about what you post, like and share. Approach the process just as strategically as you would for a paid campaign	Everything you post on social media plays into your audience's perception about you and your brand. Posting on social media is considered marketing from a regulatory perspective, and the same rules apply: non-compliant social media can lead to fines
	Share posts that reflect your firm's values	Connect more deeply (on a human level) with clients and prospective clients. For examples, if creating a supportive work environment is important to your firm, post about your employee appreciation day. If you value giving back to the community, share where your team volunteers. If financial literacy is a priority, share events or resources that support financial literacy education
	Align your social media plan with your firm's content calendar	You can plan ahead, including writing captions in advance, and get time-sensitive posts up in a timely manner?

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	Avoid sharing other people’s posts that are not in keeping with your positioning and brand message	Including posts that do not support your core messages can undermine your efforts at positioning
Increase engagement with your posts	Periodically include a call-to-action or question in your posts	Posts that invite responses encourages comment and interactions
	Always doublecheck that you are tagging the right person	People may have similar names or handles and it's easy to mix up. Note: If the right person doesn't appear in the drop-down suggestion list when you enter the @ sign, enter the person's name in the main search bar while the suggestion list is open
	Get personal: include pictures and personal stories	Posts that feel more human typically receive higher levels of engagement
	When posting about other individuals or sharing an article, tag the relevant people and organizations. That includes any employees mentioned, article authors, and news outlets	People, including reporters, are more likely to engage with posts they or their organizations are tagged in
	Engage with and comment on other people’s posts, including people you don’t know	Adding your voice to a discussion can lead people to connect with you directly to continue the conversation, building relationships
Grow Your Audience	Add two to three relevant hashtags to the end of your post. As a rule of thumb, use two broad (i.e. general topic/popular) hashtag and one specific or niche hashtag (e.g. the name of a content series, or a brand name) per post	Hashtags allow for better searchability and can create more impressions for your post, but including too many may trigger spam filters that block your post from being seen
	Send LinkedIn invitations with a personal note to people you’ve recently met at conferences and events and to people who post about your area of expertise	People are more likely to accept your invitation and share your posts in the future if they feel a personal connection