

Marketing with LinkedIn: Create Your Own Group

October 20, 2009

by Kristen Luke

Advisor Perspectives welcomes guest contributions. The views presented here do not necessarily represent those of Advisor Perspectives



LinkedIn is an effective tool for connecting with existing contacts and facilitating introductions to new contacts. Moreover, the site offers opportunities for advisors to market to their target market and centers of influence through LinkedIn groups.

Participating in various groups is one way you can utilize LinkedIn as a marketing tool, but for the more ambitious marketers, having your own group offers even greater opportunities. Creating and administering your own group is a time-consuming tactic, but it increases your exposure to your target market and allows direct access to your group members via LinkedIn email.

Other Articles by Kristen Luke

- Convert Prospects to Clients through Drip Marketing
- Five Marketing Lessons from Schwab IMPACT
- Five Ways to Cultivate Professional Referral Relationships
- How to Setup a Facebook Business Page
- Make the Most of your Networking after the Event
- Social Media Marketing for the Everyday Advisor
- Social Networking is Still Networking
- The \$3,000 Marketing Plan
- Three Ways to Market Your Business Using Facebook
- Touch Your Clients 24 Times a Year without Breaking a Sweat
- Twitter Your Way to New Clients, Part One
- Twitter Your Way to New Clients, Part Two
- Which Social Media Tool is Right for You?

Before you start your own LinkedIn group, consider who your target market is. Is there a large enough pool of people in your niche on LinkedIn to warrant a specialized group? If not, don't waste your time. This strategy is a numbers game, so if you don't have a large enough pool to start with, it won't work. But if you specialize in a large niche industry, this could be a very productive way to spend your time. In other words, use this strategy to reach employees in the oil and energy industry. Don't use it to find air conditioning repair people in Nome, Alaska.

Create a group

To start a group, go to the Groups page and "Create a Group." Fill out all of the profile information requested. When creating a summary and description, make sure you include keywords that your target market would likely search when looking for groups to join. For example, if you work with employees in the healthcare industry, you may want your summary to say, "This group is specifically created for past and present employees in the healthcare industry looking for information about their retirement benefits including employees of HCA, UHS and Kaiser Permanente" (keywords have been underlined). After all of the information has been submitted, your group is live and ready for content and members.

Add content

Before inviting people to join your group, start by adding content so that new members will have something to read when they first join. The first thing you should add is a discussion item which states the purpose of the group and how members should use it. Mark the "Make this discussion featured" box so that it will appear at the top of the discussion list, making it the first thing members see when arriving at your page.

The next step is to post articles in the news section of the group. This can include posts from your blog or articles featured on your website. If you have a blog, go to the "Manage" tab and select "Manage News Feed." You can add your RSS feed

so that all posts from your blog automatically post to your LinkedIn group. You can also include feeds from other news sources you think are relevant to the group. Be sure that all of the content you are including is relevant to the group, so that your area of expertise is clear to members.

Invite group members

Now that you have a new LinkedIn group rich in content, you need to find people to join your group. The first place to start is to go to the group “Manage” tab and “Send Invitations.” This will enable you to invite your existing LinkedIn connections to join your group. If you have a large number of connections in your target market, you will quickly grow your group this way.

Next invite people from your CRM system or database. Go to the group “Manage” tab and “Send Invitations.” Click the “Upload File” link under the Connections box and follow the instructions. You will be able to upload a .CSV file with your contacts’ first name, last name and email address. Some of the people you are inviting may not have a LinkedIn account. So for those non-members, explain LinkedIn, the purpose of the group and include a link to join in the Welcome Message. You can find the “Group Join Link” at the bottom right hand corner of the page.

These first two methods allow you to invite your existing contacts to your group. If you want to invite people you don’t know, you’ll need to take another approach. First, you will need to find out which groups people in your target market already have joined. For example, if you are specializing in the healthcare industry, you will want to research which groups these professionals typically join. You can do this by searching using keywords in the “Search Groups” box or by looking at the groups your current connections have joined. Whenever possible, join groups with members in your target market. Sometimes a group has membership requirements precluding you from joining, but other times no one is monitoring membership.

The more groups you join the better. as you will soon discover.

Once you have thoroughly researched potential groups and have been accepted into as many as possible, the next step is to find people to invite to your group. LinkedIn allows you to contact group members directly without an upgraded account. The more groups you belong to, the more people you will be able to directly access and invite. You may want to send an invitation to every member of the other groups you have joined.

However, you may end up with people that don’t fit your target market this way, so here is a different tactic. If members of your target market tend to work for similar companies, use the “Companies” page to search for current employees. You won’t be able to see everyone who works for the company you searched, but you will be able to see those who are first, second or third connections or are members of a group that you belong to. (A first connection is someone to whom you are linked; a second connect is someone to whom they are linked; and a third connection is someone to whom that person is linked.)

By now, you should have invited your first connections to your group and you won’t be able to invite your second or third connections without an upgraded account, so ignore those people. The people you will want to invite are the group members. You can send an invitation to everyone with “group” next to their name. Do this by clicking “Send a message.” Briefly describe why you are inviting them, state the purpose of the group and include a link for them to join. Since you will have to invite each person separately, this can take hours to complete. I recommend you have an administrative assistant or intern do this for you. Continue to do this with different companies until you have either exhausted all of the possible invitees or have a solid membership base. From there you can rely on the LinkedIn group directory to continue to organically grow your group membership.

Weekly maintenance

A group needs regular activity to be successful. Monitor the group discussions and answer any questions you can – either publicly or privately. Discussions and news articles will eventually disappear if there is no activity, so make sure that there is at least one new discussion or news article each week. Eventually, group members will begin participating on their own, which will provide for richer content and will spur more participation.

In the meantime, it is up to you to keep the group alive.

If you have something particularly important to share with your group, such as a new study or white paper, use the “Send an Announcement” feature to email the entire group. This provides another outlet to contact your target market. Use this feature sparingly since you don’t want to be perceived as spamming your members.

A final word of advice

This is an advanced LinkedIn marketing tactic. Make sure you are comfortable with LinkedIn before initiating this tactic, or seek assistance to ensure that it is done correctly. Be clear as to the purpose of your group, who you are targeting and focus your communication to meet their needs. Let your group know that you are available to answer any questions they may have and provide them the opportunity to contact you so you can measure your results.

Kristen Luke is the Principal of Wealth Management Marketing, a firm dedicated to providing marketing strategies and support for financial advisors. Kristen works with independent advisors to develop effective marketing plans and provides the back office support required to implement the strategies. For more information visit www.wealthmanagementmarketing.net.