

## Social Media for Sales Set Up Step-by-Step

*This document will help you set-up Twitter, LinkedIn and Facebook accounts for professional use. This accompanies the webinar Social Media for Sales Setup found at the [Chubb Education site](#) under the Webcasts tab.*

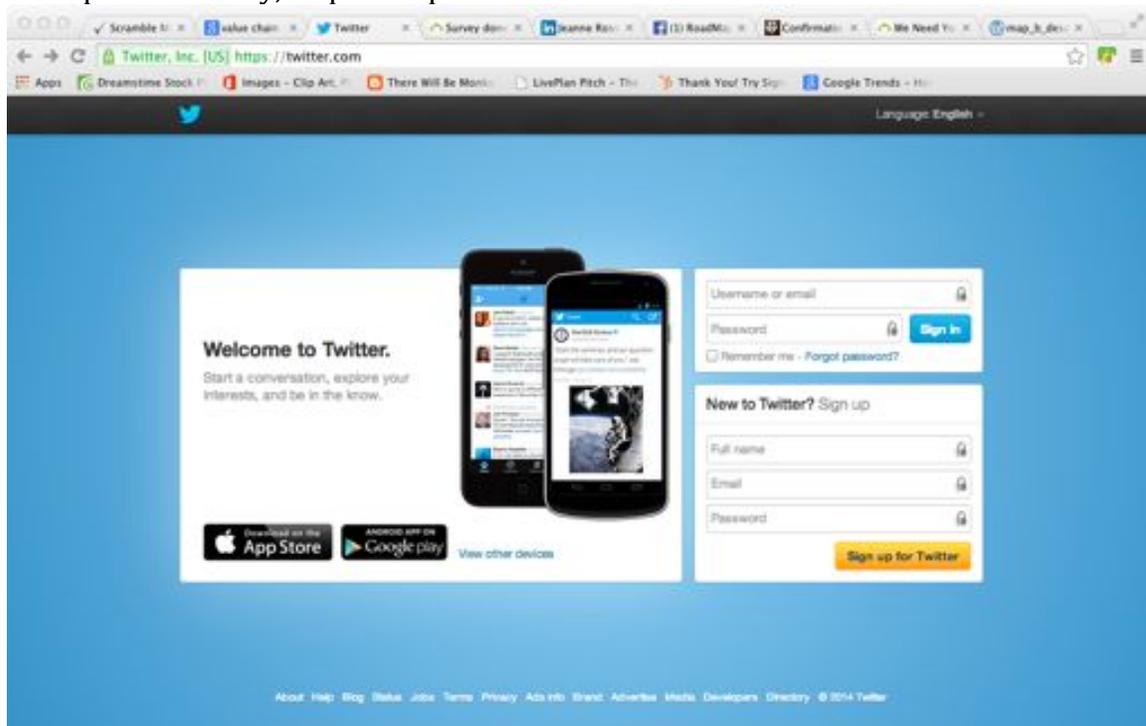
Before you start:

**Do you already have Facebook or Twitter personal accounts?** Personal networks are used for social connections and entertainment. People want to unwind, be distracted and have fun. Professional networks used for aspiration and achievement. People want to learn information and connect with resources that will help them professionally. If you are using social media extensively for personal communications, set up a separate account for business. This guide will show you how.

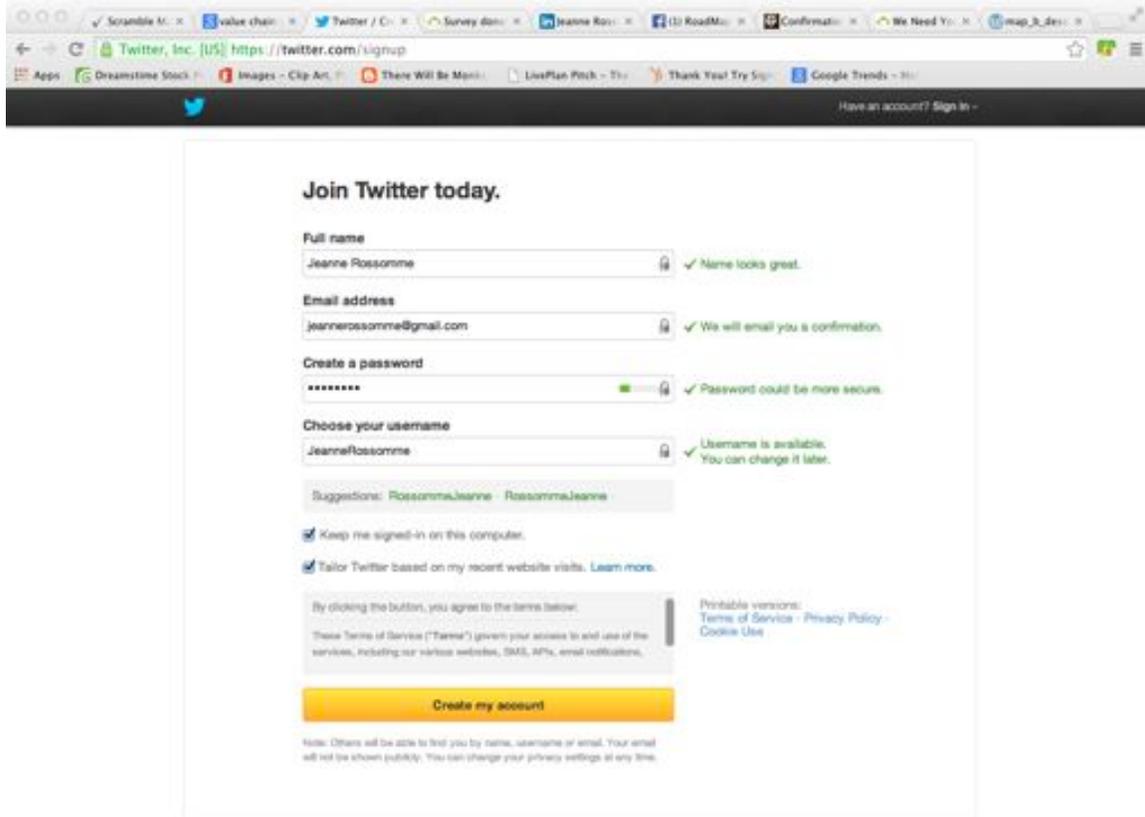
**Your Photo:** Keep it professional! This means a simple headshot of just you. You do not have to wear a suit but you want to appear friendly, yet trustworthy. Options are wearing your company's polo shirt or standing in front of its logo. Recommended dimensions of 1252x626 pixels and maximum file size of 5MB.

### Twitter:

Do you already have a Twitter account? If you already have an account and want to use it professionally, skip to step 6.



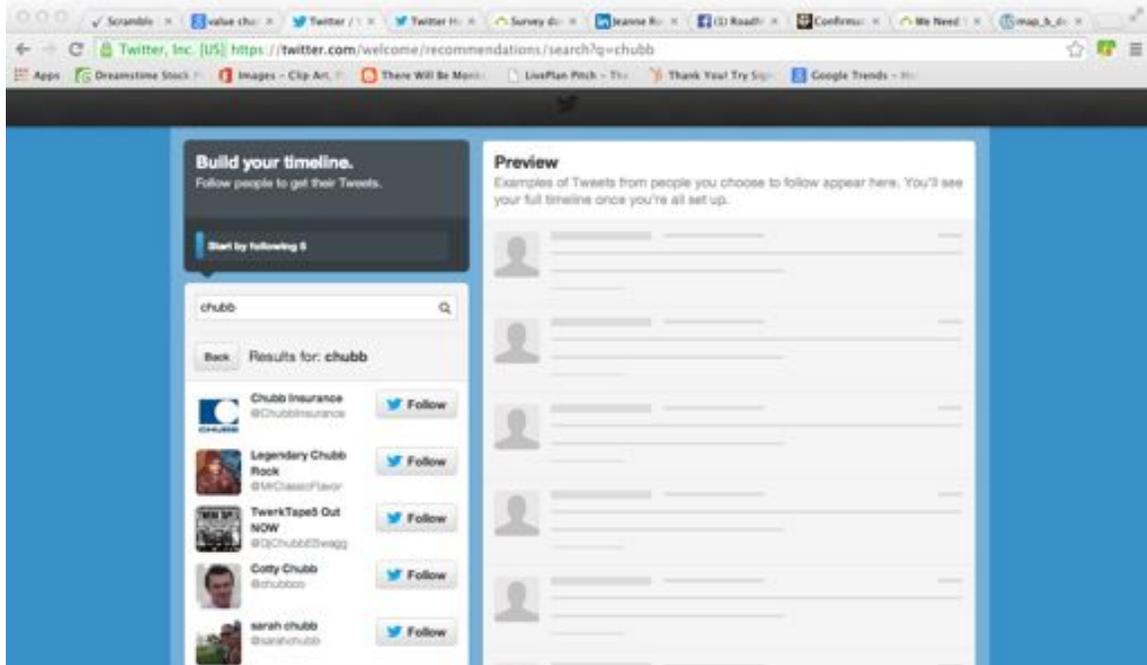
1. **Welcome to Twitter.** Go to <https://twitter.com/> Enter the name you are known by professionally (even if it is a nickname) and your work email address (so others can find you). Click Sign up for Twitter.



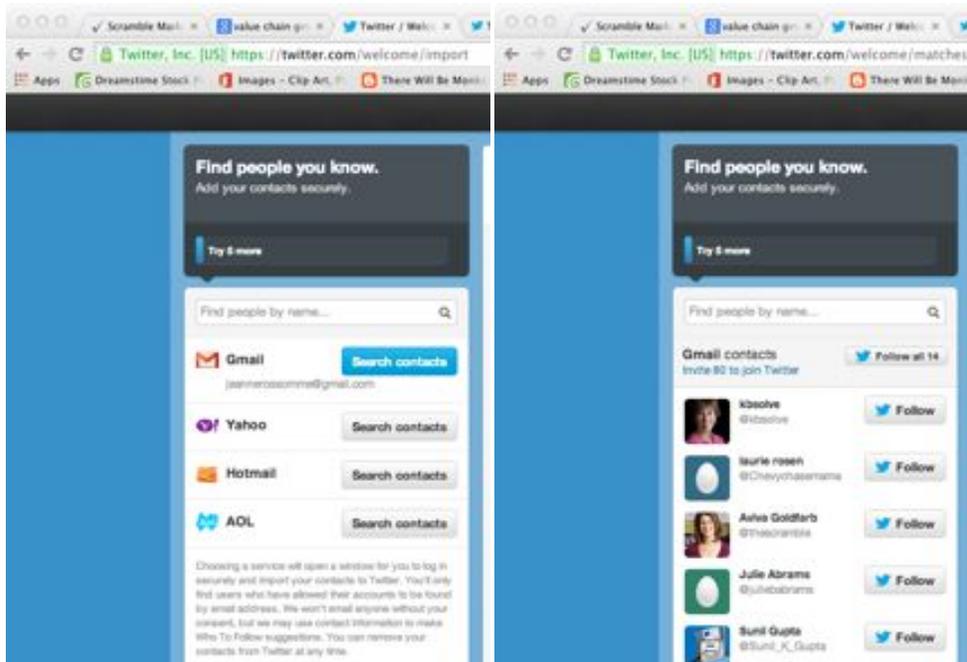
**2. Choose your username.** This is a 15-character name that others will see when you tweet. While you can change it at any time, it's best to choose one that you'll be happy with for the long term, as you don't want to confuse your followers. Normally this should be related to your name or company so people can easily remember you and tag you in their tweets. If your name is taken, try using your name with your company or your area of specialty like Nick\_Chubb or JohnSmithChubb or Casualty\_Jeanne. (Note: Avoid using a number like JohnSmith 27 – it will be difficult to remember or distinguish you.) **Click Create my account.**



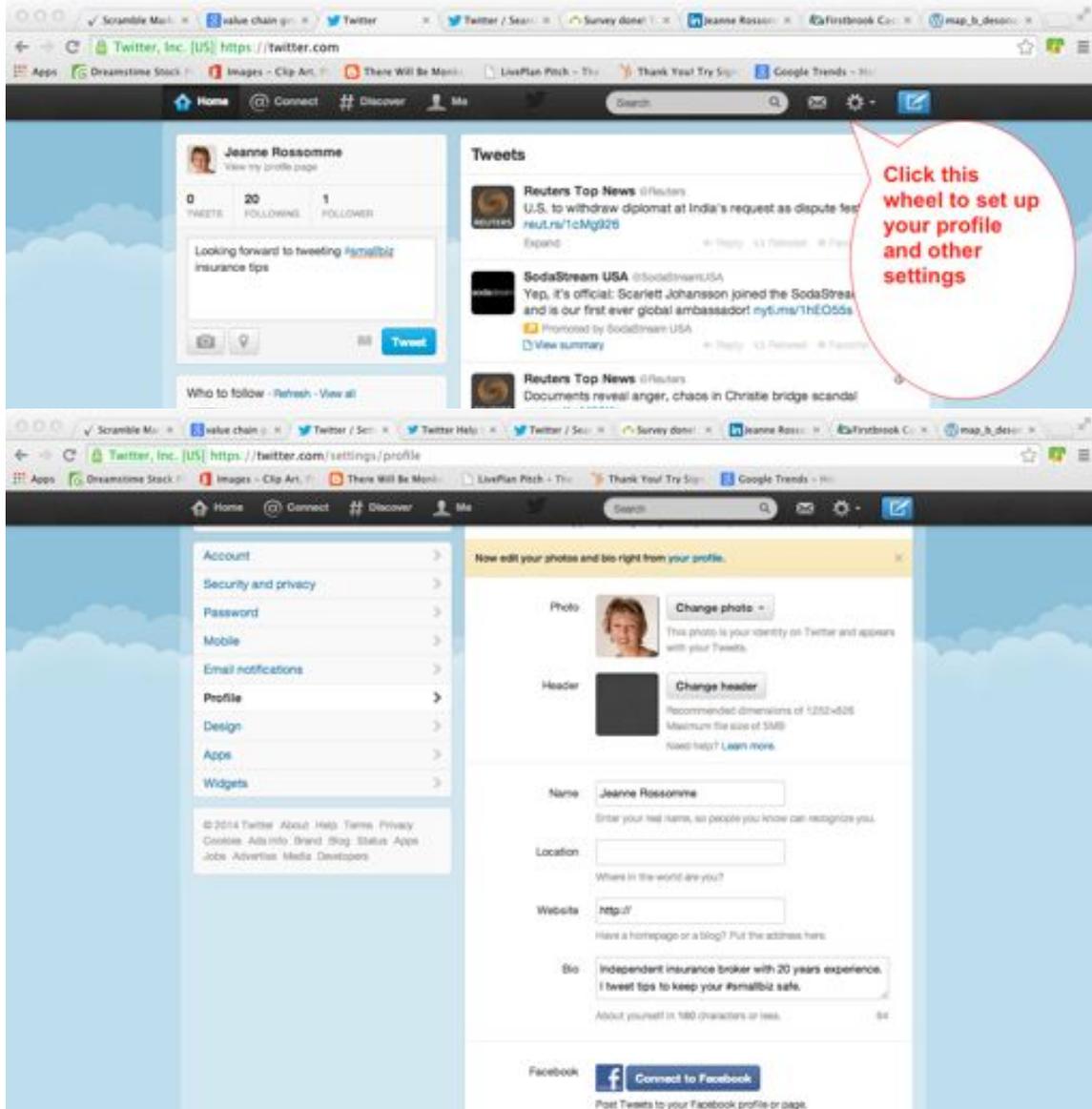
**3. Get Started in less than 60 seconds. Click Next.**



4. **Build your timeline.** Contrary to the label, this is not a timeline but a prompt to set up at least 5 followers. In the search bar, type in topics of interest and specialty such as Insurance, Property and Casualty, etc. **Click Follow on those of interest to get started.** Following someone on Twitter just means that you will see their updates or tweets on your page so don't worry. Just choose 5 names to get started.



5. **Find people you know.** Here Twitter may suggest people based on your email directory. This is a quick way of importing the Twitter names of your contacts. You can then choose to follow all or a selection of your contacts. (You can always change your choices.) **If you wish to do this later, you can skip this step.**



**6. Create Your Profile** (click on the wheel in the top right corner):

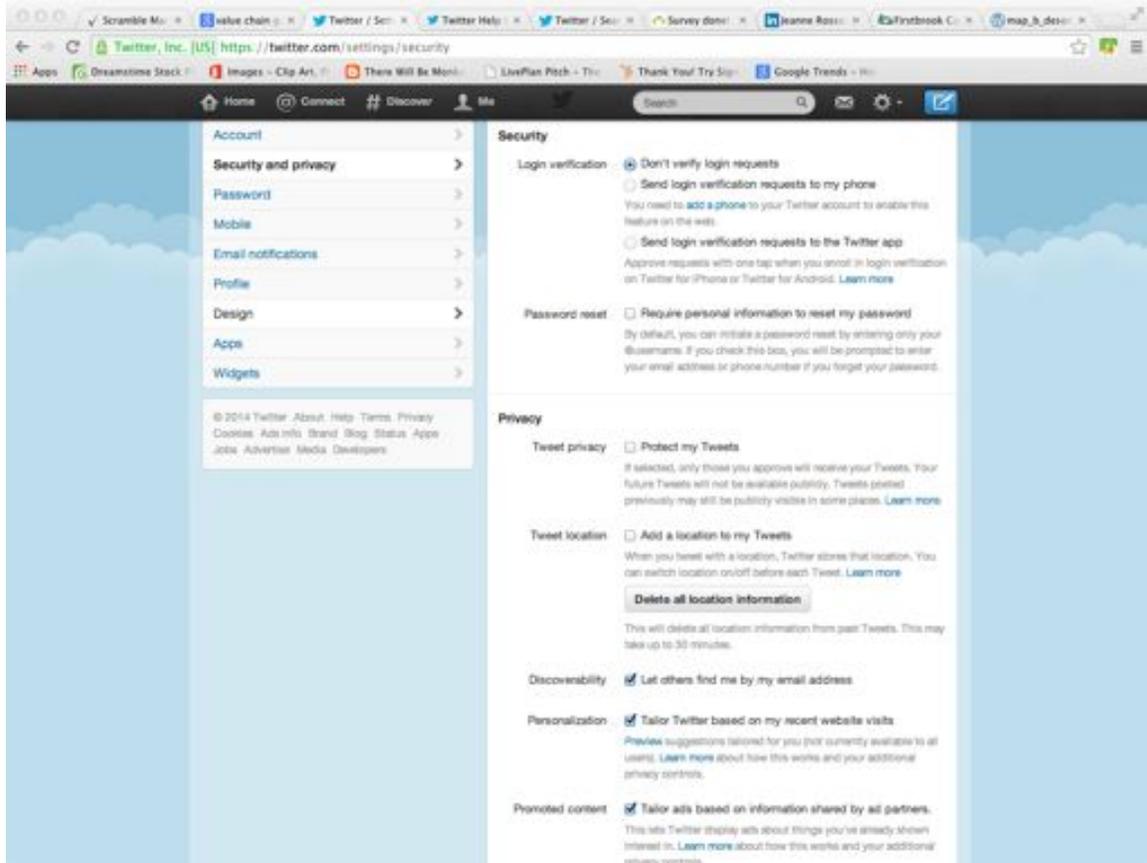
**Name:** Use your real name (with your nickname if you are known by that).

**Location:** Work location City, State

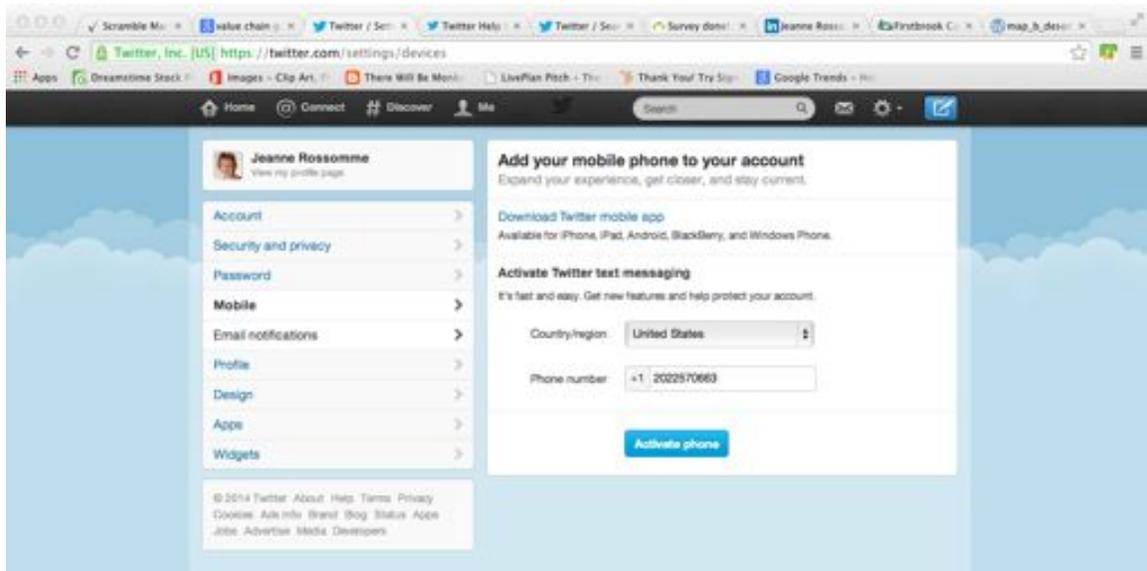
**Website:** Link to your professional page, company website or LinkedIn profile.

**Bio:** Use the 160-character Twitter bio to help your target audience understand how you can help them rather than just describing yourself or company. Don't give job titles but instead "what am I passionate about learning and sharing with others?" or "How can I help? Twitter has a more whimsical feel so you can be more creative, less formal than LinkedIn.

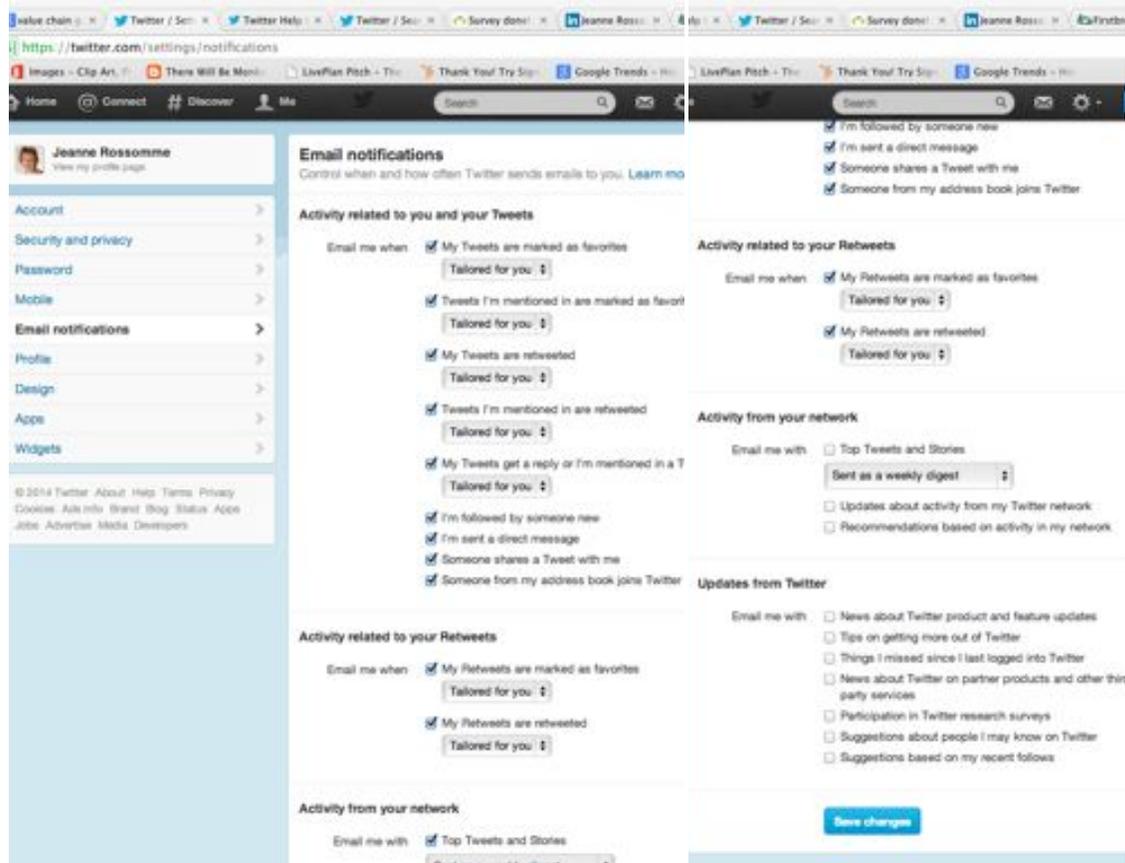
**Connect to Facebook?** Generally it is best practice to keep these separate and not automatically post so don't click on this link. **Click Save changes.**



7. Security and Privacy: Generally follow the defaults suggested by Twitter.



8. Mobile: Since Twitter is an “in-the-moment” medium, have alerts sent to your cell phone so you can be easily contacted.



**9. Email notifications:** Follow Twitter suggestions but Uncheck the options under Activity from your network and Updates from Twitter.

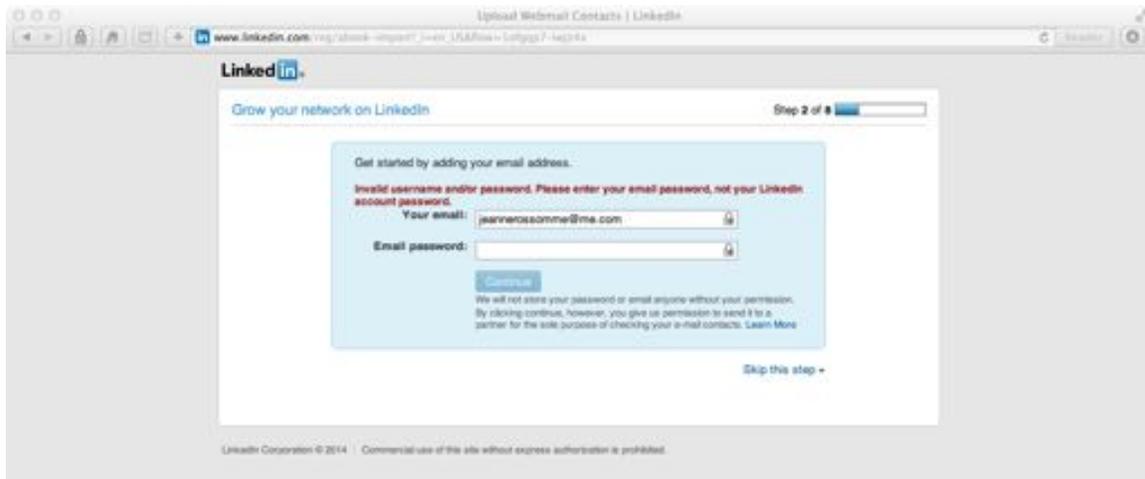
# LinkedIn

The screenshot shows the LinkedIn homepage with the registration form. At the top, there is a navigation bar with the LinkedIn logo and a search bar. Below the navigation bar, the main heading reads "Connect, share ideas, and discover opportunities." To the left of the registration form is a grid of six diverse people's faces. To the right, the text says "Get started – it's free. Registration takes less than 2 minutes." Below this text are four input fields: "First name", "Last name", "Email address", and "Password (6 or more characters)". A yellow "Join now" button is positioned below the password field. At the bottom of the registration form, there is a link to the "User Agreement, Privacy Policy and Cookie Policy". Below the registration form is a search bar for finding colleagues, with a "Search" button. At the very bottom, there is a footer with various links such as "Help Center", "About", "Press", "Blog", "Careers", "Advertising", "Talent Solutions", "Tools", "Mobile", "Developers", "Publishers", "Language", "Sidelinks", "LinkedIn Updates", "LinkedIn Influencers", "LinkedIn Jobs", "Jobs Directory", "Pulse Directory", "Company Directory", "Groups Directory", and "Title Directory".

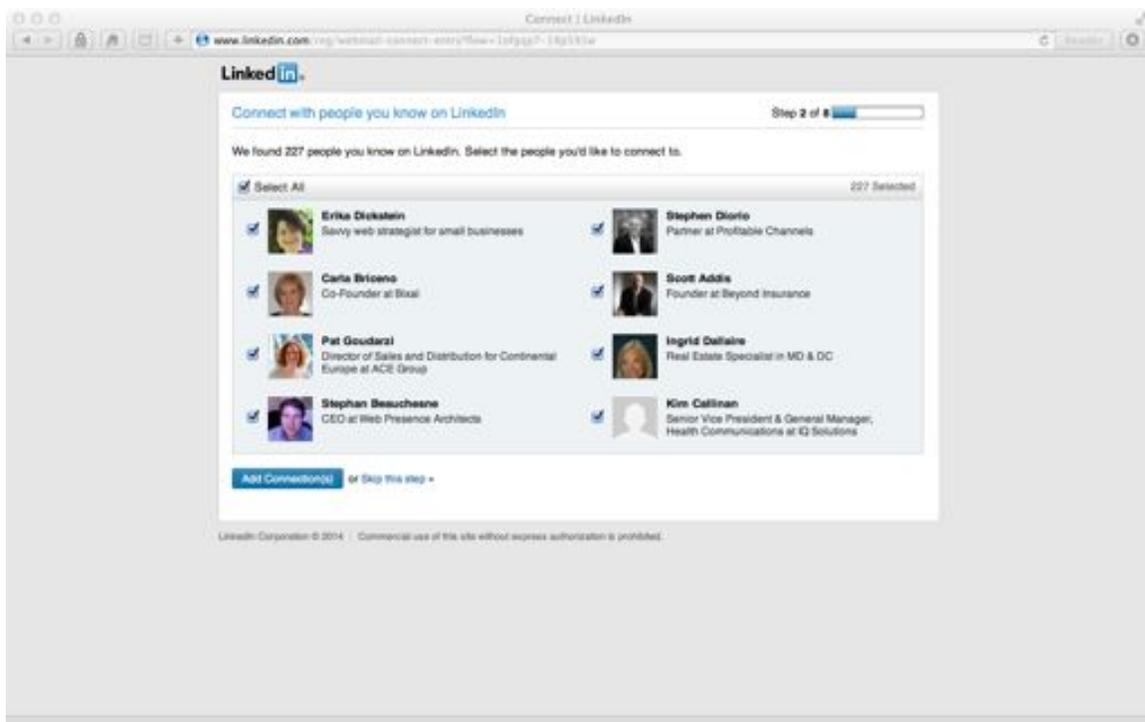
1. **Start.** Go to <https://www.linkedin.com/>. Enter your name and your work email address (so others can find you). Click **Join now**.

The screenshot shows the LinkedIn "Build Your Profile" form. The page title is "Build Your Profile | LinkedIn". The main heading reads "Jeanne, let's start creating your professional profile". The form contains several fields: "Country" (set to "United States"), "ZIP Code" (with an example "e.g. 94043"), "I am currently:" (with radio buttons for "Employed", "Job Seeker", and "Student", where "Employed" is selected), "Job title", "Company", and "I am self-employed" (checkbox). A blue "Create my profile" button is at the bottom of the form. To the right of the form, there is a section titled "A LinkedIn profile helps you..." with three bullet points: "Showcase your skills and experience", "Be found for new opportunities", and "Stay in touch with colleagues and friends". At the bottom of the page, there is a footer with the text "LinkedIn Corporation © 2014. Commercial use of this site without express authorization is prohibited."

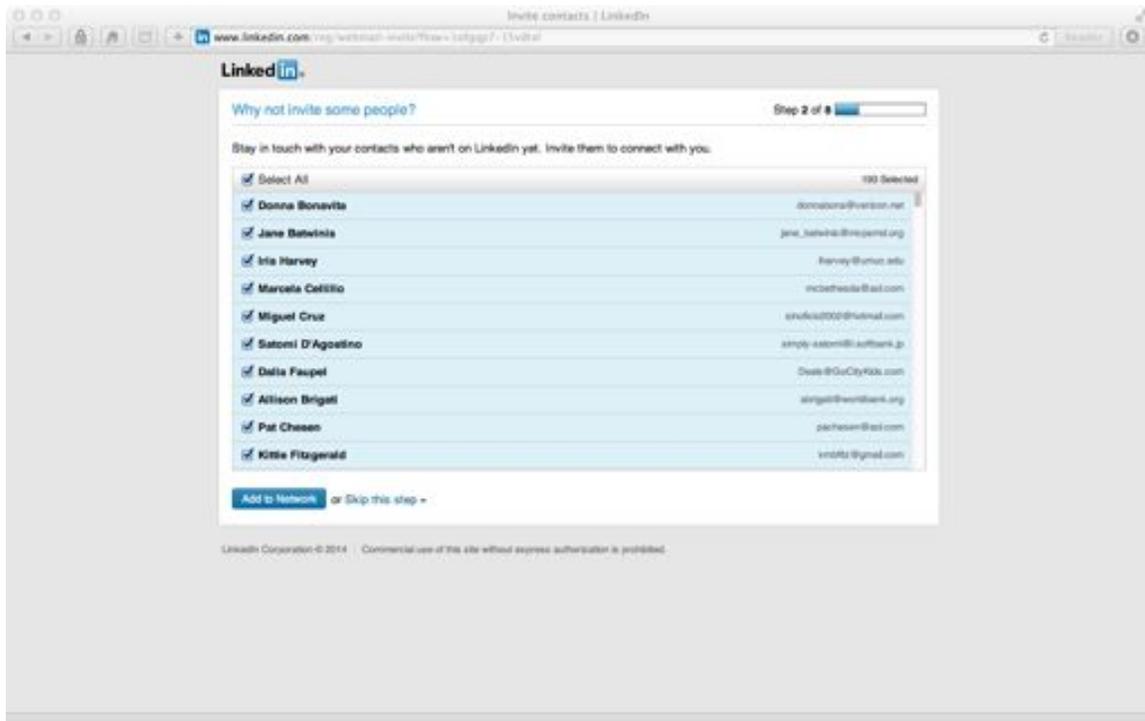
2. **Start creating your professional profile.** Enter your work location, Job Title and Company. Click **Create my profile**.



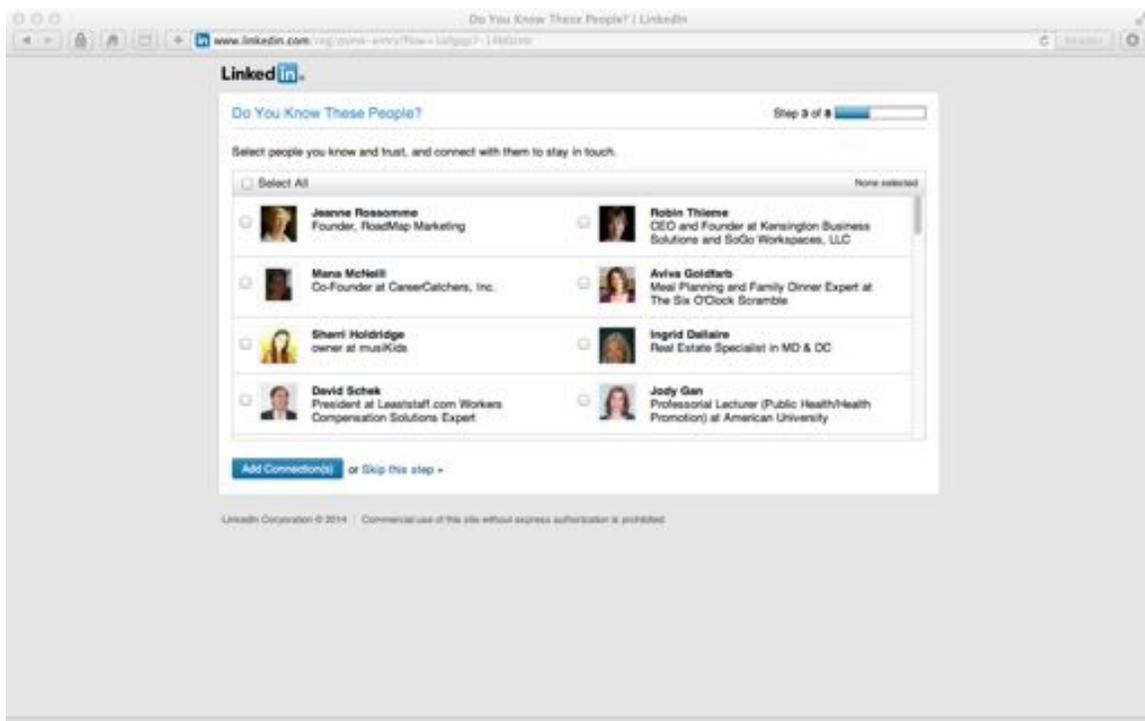
**3. Grow your network.** Here you are prompted to enter your email and email password. LinkedIn will use this as permission to scan your email contacts for building your contact list. This can be a big time saver and you will have the ability to select contacts. If you do not feel comfortable, click Skip this step. You will also be sent an email to your email address. Click on the confirmation link in the email to activate your account.



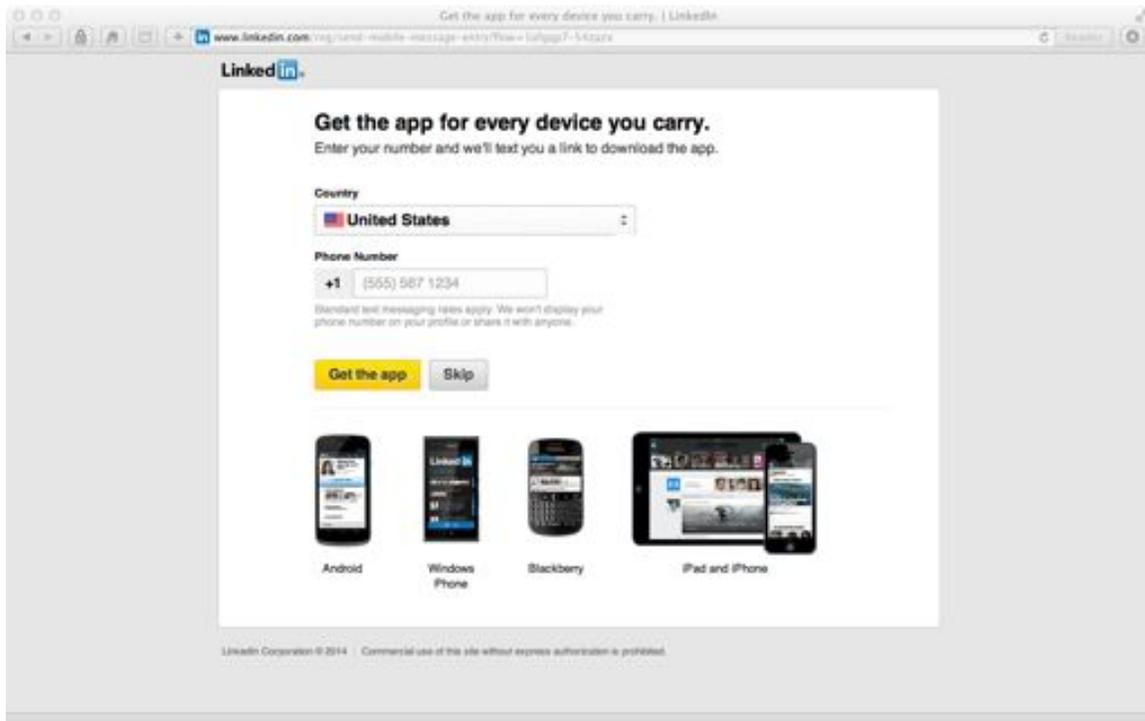
**4. Connect with people you know.** Here you can check or uncheck any contacts that you wish to add to your LinkedIn network from your contact list. Otherwise you can uncheck the Select All box or click Skip this step.



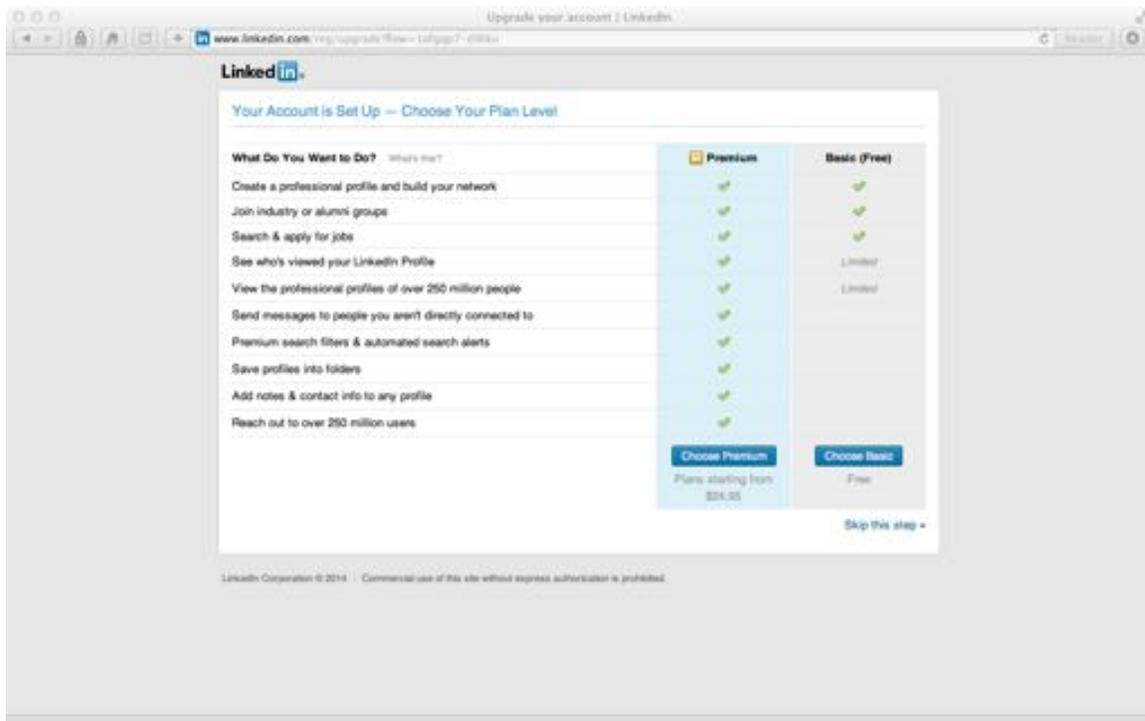
5. **Invite others.** Here you can send an invite (via email) to those people in your contact list who are not currently on LinkedIn by leaving a check next to names. Otherwise Select Skip this step.



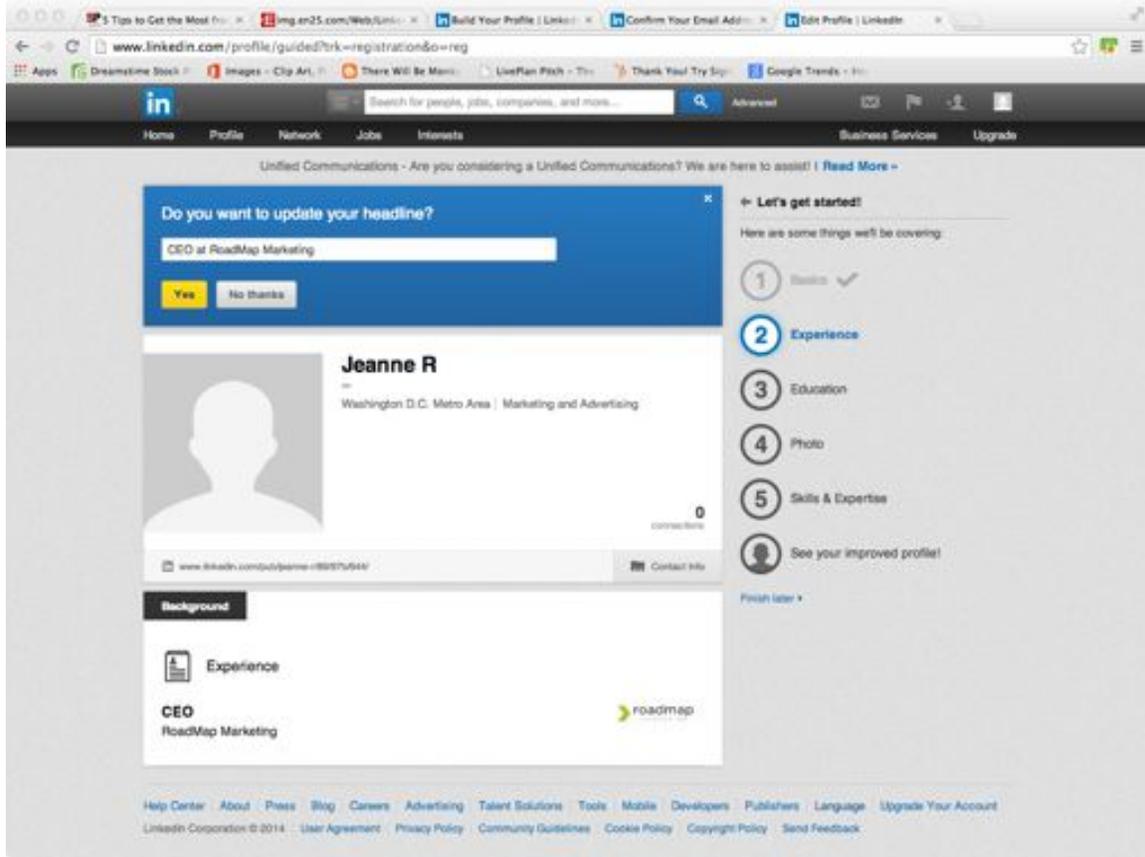
6. **Do you know these people?** LinkedIn selects people you may know based on the information they have thus far. LinkedIn may select co-workers at your current company or connections of people in your address book. If you wish to add connections, select those of interest. Otherwise, select skip this step.



7. **Get the app.** This feature allows you to easily access LinkedIn from your mobile device if interested.



8. **Plan Level.** In starting out it is best to go with the Basic (Free) level and get comfortable with the use. For now select **Choose Basic.**

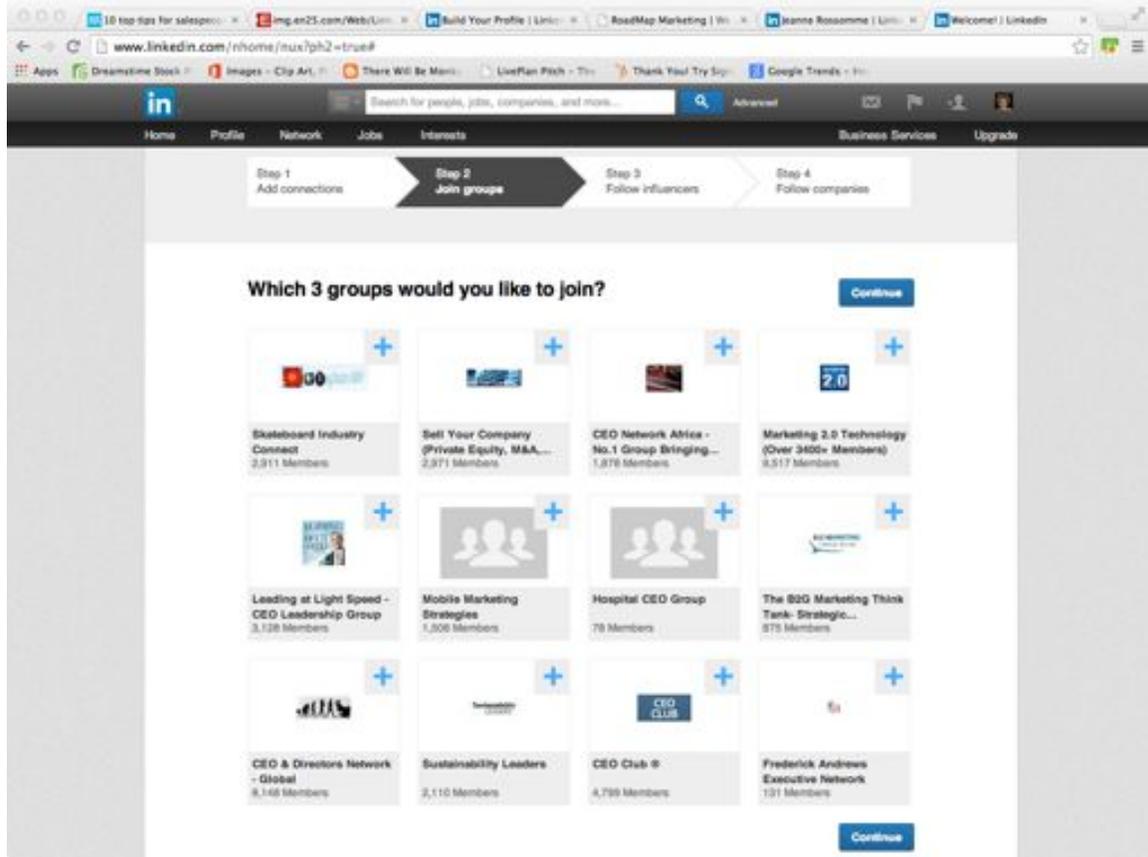


**9. Your Profile:** LinkedIn will guide you through all the details of your past experience, education, etc. Ideally fill out as much of your profile as possible - as you would a resume. Include not only your current organization, but also companies you've worked for in the past, as well as education, military service, affiliations, and activities. That way, you increase the chances your name will come up in a search. Provide complete descriptions of your current and past positions with an eye to what prospects would be interested in: What results did you achieve for clients/employers? What expertise do you have?

**Headline:** Your headline is very important and will display in any search. Create a compelling description, rather than just a title, on how you deliver value to your clients. For example, "insurance agent with 20 years experience helping owners protect their businesses and families".

**Summary:** This is one of the first things that a potential client will see. Include here why people do business with you. Be sure to include keywords that prospects use (industry and layman terms) for finding you.

**Skills:** Here you should select from any list of specific Insurance specialties: Health insurance, General insurance, Commercial insurance, Life insurance, Property & casualty insurance, disability insurance, umbrella insurance, term life insurance, insurance law.



10. **Join Groups.** Here you can search for professional groups to join. Or you can skip this step for now.

## Facebook

With Facebook, you first need to create a personal profile and then a Business-only page. This allows you to more cleanly separate your personal versus professional communications. If you already have a personal Facebook account, skip to step 4.



1. Sign Up. Fill out your name, email, password, birthday and gender. Click Sign Up.



2. These pages are for finding friends and interests for your personal page. You can Skip these steps.

### 3 Update your profile so friends can find you.

High School	<input type="text" value="High School Name"/>	
College/University	<input type="text" value="College or University Name"/>	
Employer	<input type="text" value="Company Name"/>	
Current City	<input type="text" value="Current City"/>	
Hometown	<input type="text" value="Hometown"/>	

[Save Profile Info](#)



Step 1 Find your friends   Step 2 Choose interests   **Step 3 Add Profile Pic**

#### Set your profile picture



Remove Your Picture

**Upload a Photo**  
From your computer

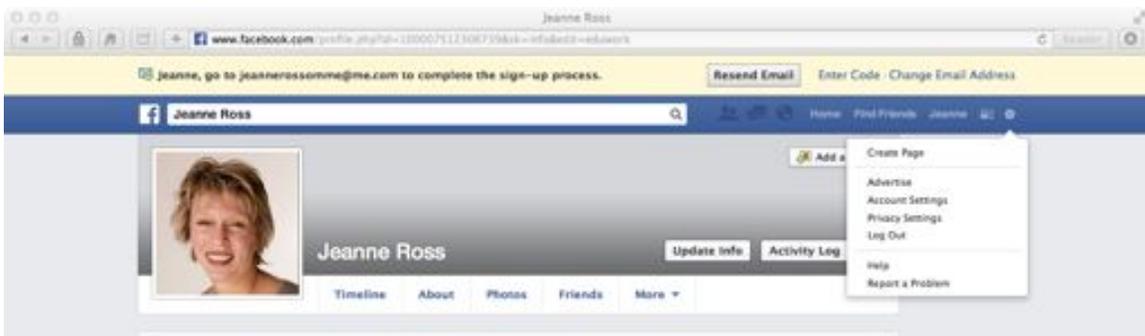
OR

**Take a Photo**  
With your webcam

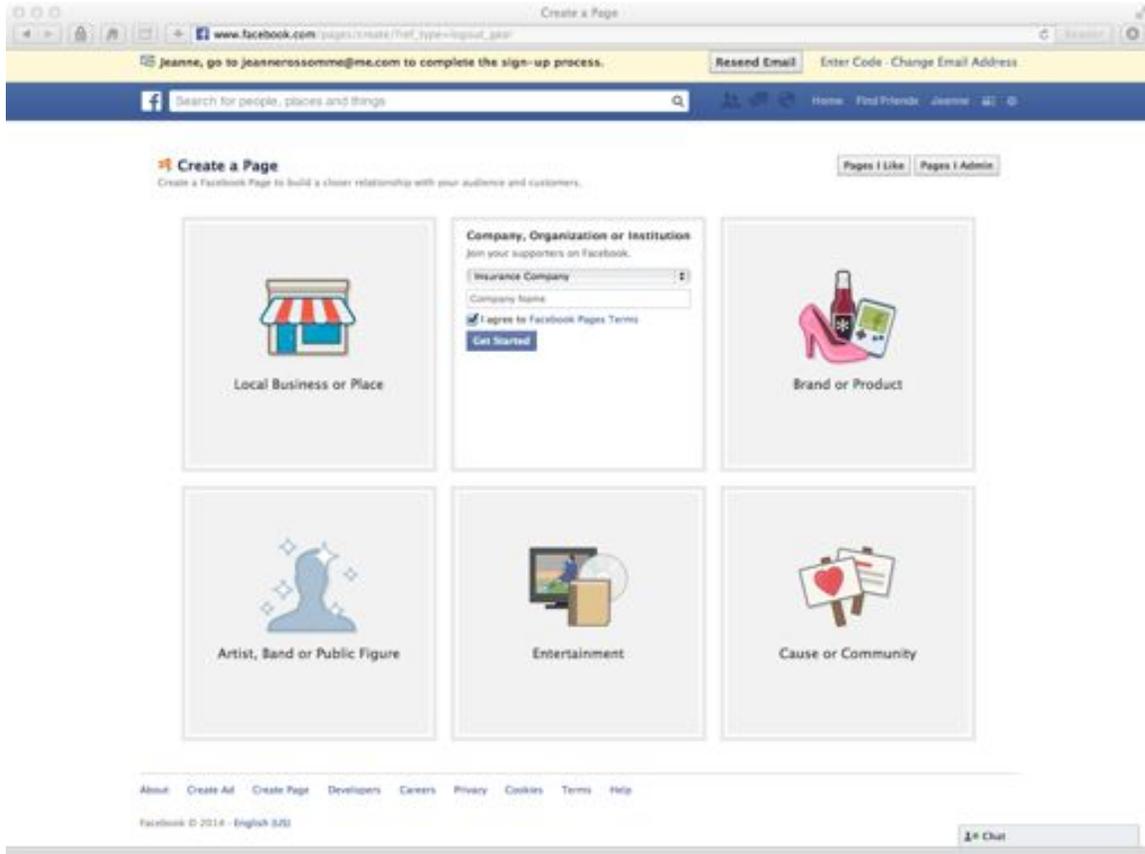
[Back](#) [Save & Continue](#)

Profile pictures and cover photos are public. You can control the audience for other photos you upload to Facebook.

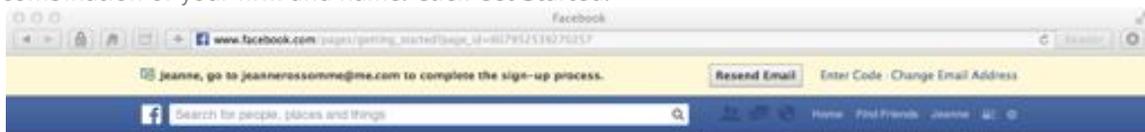
**3. Add profile info.** Upload your photo. You can also enter in some basic profile info so friends can find your personal page if you wish. Link your personal profile to your business page under the “Employers” section.



**4. Create your Business Page.** It will be “tied” to your personal profile, but they are completely separate and no one can see your personal information from your page. Click the wheel in the top right corner and select Create Page.



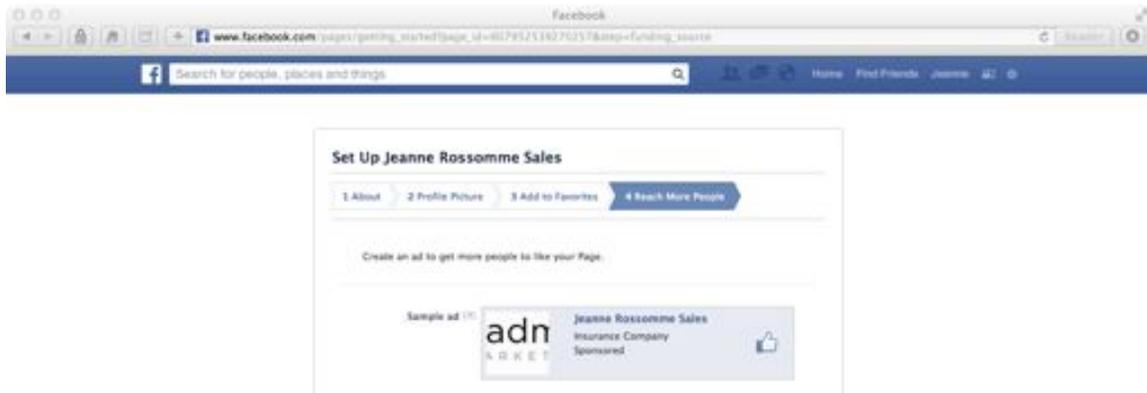
5. **Create Page.** Select Company, Organization or Institution and select your Industry (Insurance). The name you type in under Company name will be your page name. You can use your name or a combination of your firm and name. Click Get Started.



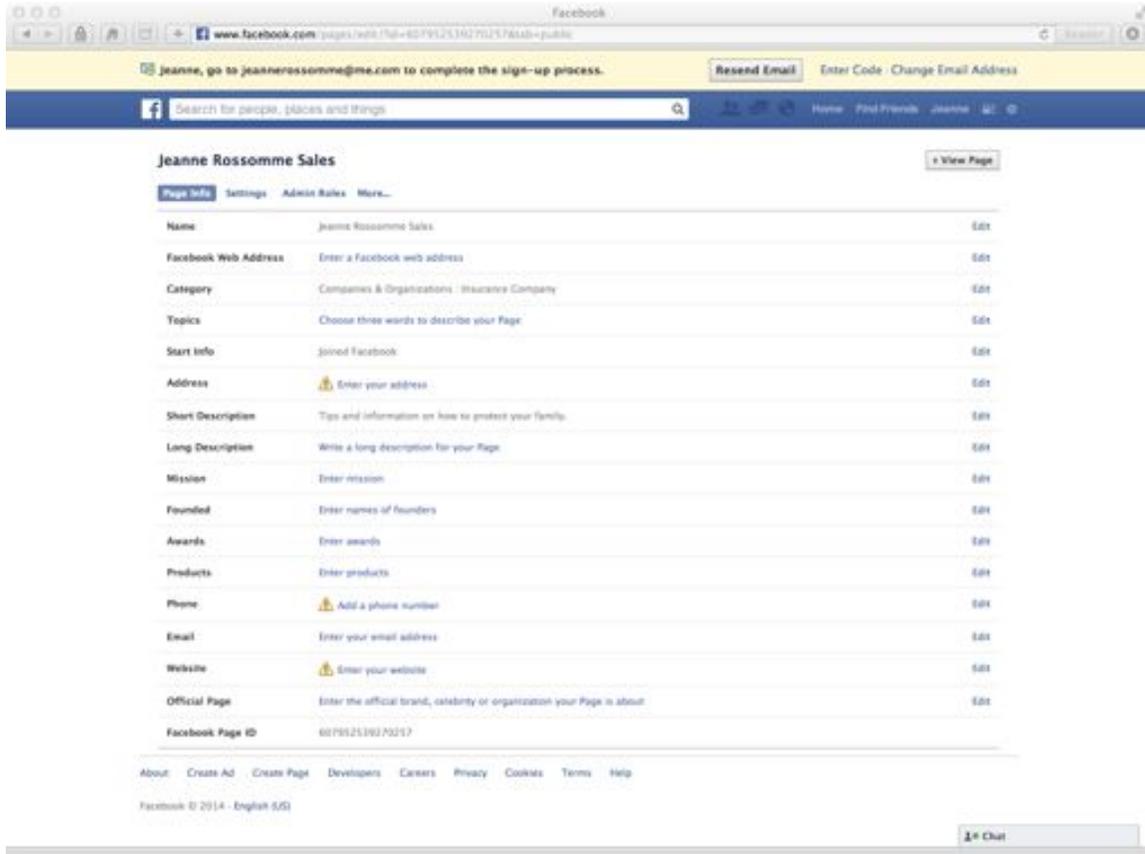
6. **Set Up Business Page.** In the **About** section, your description will appear directly on your timeline so use the 155 characters to describe your added value to those that “like” you professionally. In the **Contact** section, include links to your LinkedIn and Twitter accounts.



7. Add your page to your favorites so it shows up in your personal timeline.



8. Skip the Create an ad section.



9. **Page Info.** Here you can add additional professional information and contacts.

Congratulations! You have now created professional accounts for Twitter, LinkedIn and Facebook!

Want to learn more about how to use Social Media to connect with more sales prospects? Contact Chubb Education about scheduling the live three-hour workshop [“Social Media for Sales Producers”](#) at your location.