



YARDSTICK



CHECKLIST SERIES

Checklist #16: A step by step guide to creating the perfect LinkedIn profile

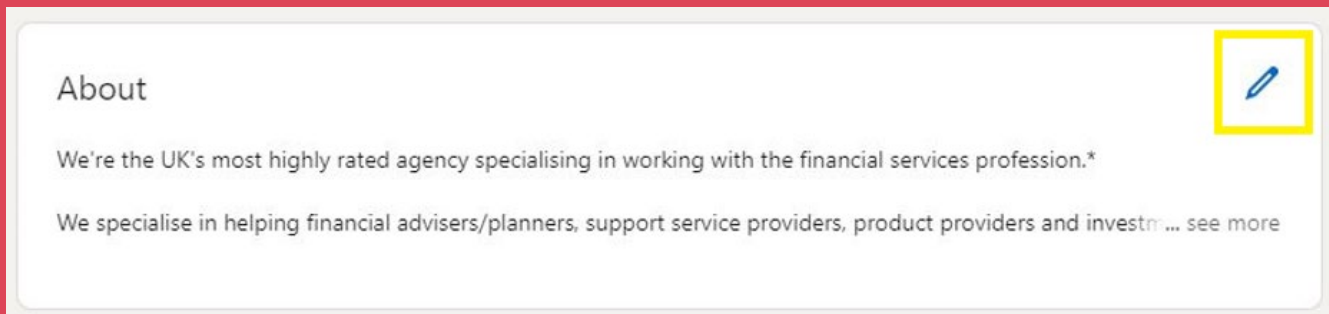
Your LinkedIn profile is far more extensive than other social media platforms. It's effectively a mini-website all about you. Consequently, building a great profile takes more time and effort than say Facebook or Twitter.

So, to help we've created this step by step guide which explains everything you need to know and do to create the perfect profile. We've also developed a handy checklist, which you can use to make sure you don't miss anything.

The key parts of a LinkedIn profile

Your LinkedIn profile is made up of several sections which we'll deal with broadly in the order they appear.

Each of these sections can be amended by clicking on the small edit icon as shown in the image below:



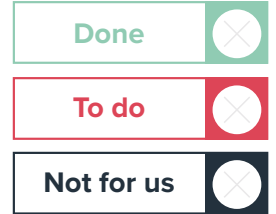
Your profile URL

Customising your URL is a quick and easy way to differentiate you from other LinkedIn users, boost your credibility and look more elegant when sharing it with others.

To customise your URL:

- Sign in to LinkedIn
- Click: Me
- Click: View Profile
- Click: Edit public profile & URL in the top right-hand corner of the page
- Click: The blue edit icon to the right of your existing URL and type in your preferred URL to see if it's available when you find one that is, click 'Save'

The URL can include letters and numbers and be up to 30 characters in length. Although, you can't use spaces, special characters or emojis. Ideally, you should use a combination of your name and your business name.



1

Banner image

The banner is the section at the top of your profile and its prime online real estate seen by everyone who visits your LinkedIn profile. However, it's often overlooked and blank, or, includes an ineffective if attractive image.

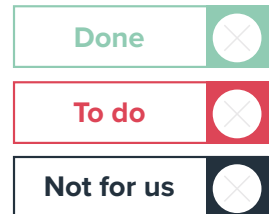
Instead, we recommend putting it to work by including the following in your banner:

- Your logo
- Social proof; for example, an award, client testimonial, VouchedFor rating and so on
- Contact details
- Website address

To change your banner image:

- Sign in to LinkedIn
- Click: Me
- Click: View Profile
- Click: Click on the edit button in the top right-hand corner of the banner image
- Follow the steps from there

If you're struggling to design an eye-catching banner, we can help. Simply email hi@theyardstickagency.co.uk and we'll be in touch.



2

3

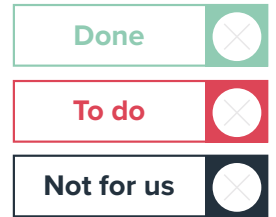
Picture

According to LinkedIn, profiles with a photo get up to 21 times more views than those without.

Ideally, your photo should be professional and clear. Remember too that it's small and round so make sure your face fills most of it.

To add a new image:

- Sign in to LinkedIn
- Click on your photo
- Follow the steps from there



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Headline

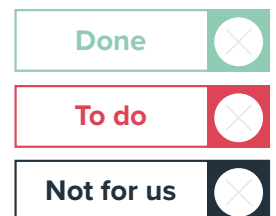
Your headline is prominently displayed below your image, it's therefore important you get it right.

Instead of simply including your job title, you've got 120 characters to be more creative by including your job title e.g. Financial Planner, then explain three key things using terms and keywords potential clients might search for:

- What you do
- Who you do it for
- Why people work with you

To change your headline:

- Sign in to LinkedIn
- Click: The edit icon next to 'More', below the banner image
- Scroll down: Complete your headline
- Click: Save



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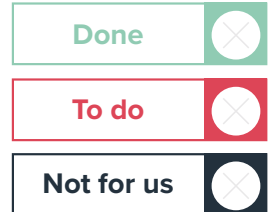
Contact info

The contact details on your profile can include:

- Your website address (you can add multiple websites, so include links to pages where clients can engage with your social proof, for example, the client stories page on your website or your VouchedFor profile)
- Telephone number
- Office address
- Email address
- Links to other social media channels
- Your birthday (which always encourages messages from connections and potential clients)

To edit your contact details:

- Sign in to LinkedIn
- Click: Me
- Click: View Profile
- Click: The edit icon next to 'More', below the banner image
- Scroll down: Click the edit icon next to 'Contact info'
- Click: Apply
- Click: Save



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About

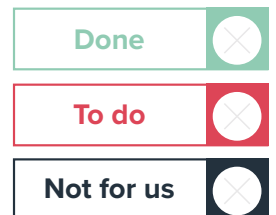
This section should include information about:

- Who you work with
- Your differentiators (there are no USPs in financial services)
- The benefits of working with you (ideally including social proof)

Use sub-headings to highlight key information. Then, make your sub-headings stand out even further by:

- Highlighting them in bold: There is no formatting functionality in this section of LinkedIn, however, you can copy and paste headlines in bold or italics by using YayText (available here: <https://yaytext.com/bold-italic/>)
- Adding icons or graphics: It's also possible to cut and paste icons and graphics into your 'About' description to make the sub-headings stand out. You can source these by visiting: <https://emojipedia.org/>

These tools and techniques mean visitors to your profile will take away key information even if they just skim read this section.



Featured

This is often overlooked but it's incredibly important as it allows you to showcase your work to people who visit your profile.

You can add:

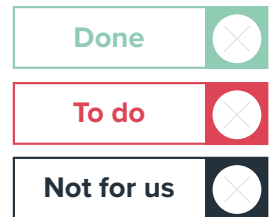
- Your latest or best LinkedIn posts
- Articles that you've written and published on LinkedIn
- Links to your website, perhaps to an important page or your latest blog
- Media including images, documents and presentations
- Videos; it's the perfect place to show off your client videos and demonstrate the value of financial planning. We've not seen any financial planners do this, so if you've got client videos now's the time to add them and stand out!

To add to the 'Featured' section:

- Sign in to LinkedIn
- Click: Me
- Click: View Profile
- Scroll down to the 'Featured' section
- Click: The Plus icon (+)
- Select: Either Posts, Articles, Links, Media and follow the instructions

To remove or reorder items in the 'Featured' section:

- Sign in to LinkedIn
- Click: Me
- Click: View Profile
- Scroll down to the 'Featured' section
- Click: The edit icon
- To reorder items: Use the drag and drop functionality by hovering over the three lines and moving items
- To remove items: Click 'Remove from featured' and confirm your choice



Experience

This section of your profile is where you list current and previous roles. Keep it relevant though to potential clients who might view your profile and use the section to highlight key achievements in those roles.

Use the same tools and techniques that you did in the 'About' section of your profile to make key points stand out for those people who skim your profile.

To make changes:

- Sign in to LinkedIn
- Click: Me
- Click: View Profile'
- Scroll down to the 'Experience' section
- Click the edit icon
- Complete the sections as required

This section also allows you to add links to documents, photos, sites, videos, and presentations, which can be useful to showcase the work you've done or things you've achieved in a particular role. It's also a great place to add client videos you might have produced to show the benefits of working with you.

Before clicking 'Save' you can choose whether or not to notify your network about the changes you've made. If you're making basic tweaks to your profile, we'd recommend turning this off. However, if you're changing jobs then leave it on. Just be careful with the timing though, you don't want to announce your new role too early!



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Education

This is an important section for financial advisers and planners to complete.

Again, we need to keep it relevant, but it's a great place to highlight higher level accreditations such as being Chartered, a Fellow or Accredited.

To make additions:

- Sign in to LinkedIn
- Click: Me
- Click: View Profile
- Scroll: Down to the Education section
- Click: The plus (+) icon
- Complete the sections as required

You can even add links to your certificates in this section. Again, you can decide whether or not to alert your network to changes. The same rules apply; if you're making small amends, they probably aren't worth announcing. If you're adding your newly achieved Chartered or Accredited status, they certainly are!



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Recommendations

The fact you can't display ratings and reviews from other platforms on LinkedIn make recommendations on here all the more important.

To request recommendations:

- Sign in to LinkedIn
- Click: Me
- Click: View Profile
- Scroll down: Down to the 'Recommendations' section
- Click: 'Ask for a recommendation'
- Then type in the name of the person you are asking for a recommendation and follow the steps

Done



To do



Not for us



What next?

If you've got a LinkedIn profile anyone can find it. That includes potential clients. Therefore, it needs to be as impressive as possible.

Our step by step guide and checklist is designed to help you do just that.

If there's anything we've missed, please let us know. Likewise, if you need our help, please get in touch by emailing hi@theyardstickagency.co.uk or calling 0115 8965 300.

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