

# Social Selling for Wealth Management



V2.0  
March 2017  
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eCairn Social Selling is a full service lead discovery, lead engagement and sales intelligence and measurement over Twitter & LinkedIn that enables Financial Advisors and Wealth Managers, with 15 minutes per day, to network strategically with new affluents, grow their network and build their book of business.

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# Description of the Service

## Audience

Wealth Managers and Financial Advisors who are focused on growing and expanding their book of business and are specifically targeting new affluents.

Here is a [market analysis](#) along with links to two studies that highlight the critical importance of new affluents for private banks and financial advisors.

## Market Context

We focus on a new generation of affluents who are key targets for Wealth Managers & Financial Advisors.



“There is a growing Global Affluent Tribe who are more united by what they love than by where they live. The tribe is bonded by five core values: mobility, success, status, belonging and consumption” – *Forbes*



These includes entrepreneurs, angels, venture partners, celebrities, sports celebrities, Small Business Owners, Executives in corporations who all manage their personal brand and spend significant time in public social networks.

These people engage on social media and build micro segments i.e tribes (100's of people) that can be very profitable for a Financial Advisor / Wealth manager who target on that niche.



Examples include:

- Early employees of a Unicorn.
- Alumni of an Ivy league School in a specific city.
- Employees of successful companies in Manhattan.
- Women entrepreneurs interested in crowdfunding.
- Affluents interested in buying wines or golf timeshares.
- CIO's in Retail.
- German expatriates in Silicon Valley (CEOs, Venture partners and Angels).
- ...

## eCairn Solution

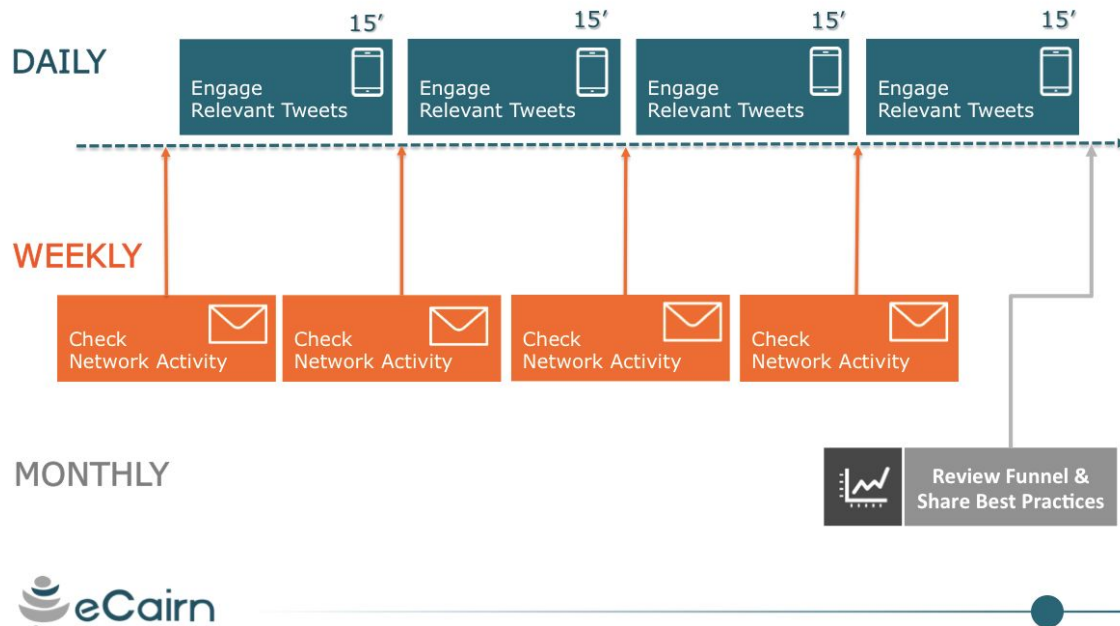
eCairn is a big data solution that mine the social web and identifies tribes of like-minded and connected people. eCairn solution is used to identify, profile and engage qualified affluents on social media.

It is a full "Social Selling Service" on Twitter and LinkedIn that has the following benefits:

- **Market Mapping:** Identification and clustering of leads (150+, active on Twitter and belonging to the same market segment)
- **Lead Profiling:** Deep profiles in LinkedIn and Twitter and collection of additional data on leads that are important for Wealth Managers & Financial Advisors.
- **Listening and Curation:** A virtual assistant that listens to these 100's+ prospects daily and tags the key tweets/posts that the Wealth Managers & Financial Advisors should pay attention to and potentially use to engage with the prospects.
- **Methodology:** Virtual assistant are training on a methodology to identify the key tweets for the Advisor to build awareness, credibility and trust or create a meeting.
- **Assistance in growing the Wealth Managers & Financial Advisors Network:** Weekly and Monthly status on the RIA effort in connecting with leads and suggestion on when to take the conversation off-line.

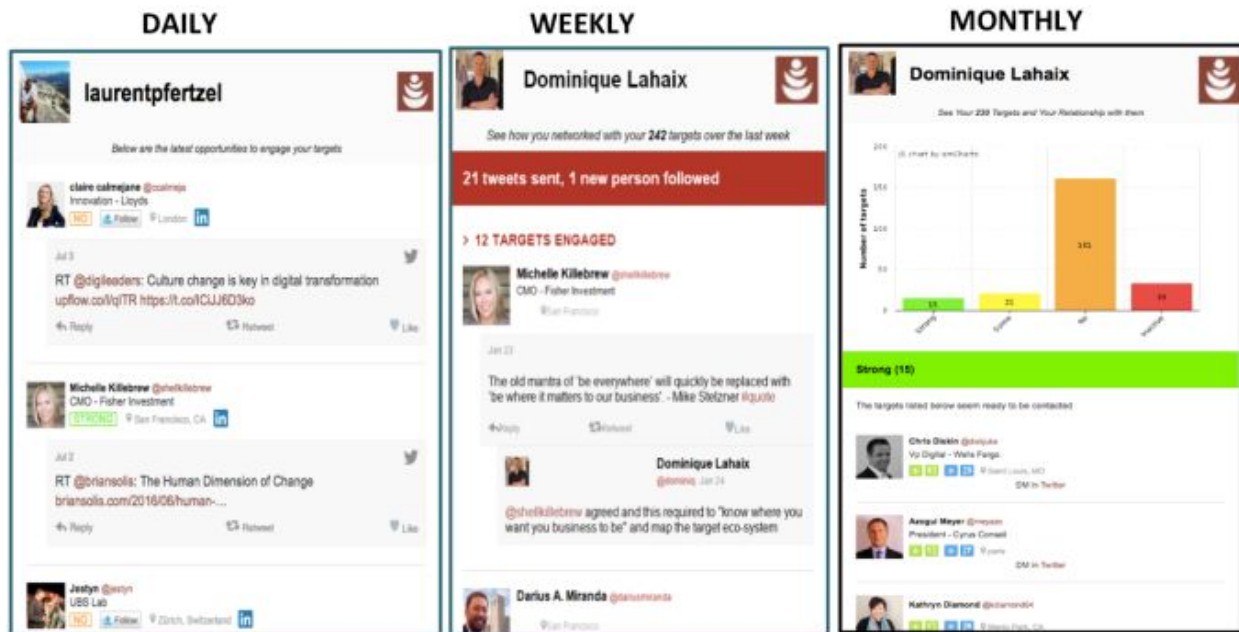


Process & requirements for Wealth Managers / Financial Advisors: The service is delivered via emails and requires no integration with IT. The service also includes a mobile application where the Wealth Manager / Financial Advisor can browse his/her list of prospects



Delivered to the Wealth Manager/RIA:

1. Daily emails with key tweets/blog posts for advisor (opportunities to learn or to engage)
2. Weekly emails with metrics and suggestions for the advisor (who to engage, new targets metrics, key events in the eco-system & weekly metrics)
3. Monthly metrics and KPIs.
4. Mobile application with access to engagement opportunities and to the list of prospects



The RIA / Wealth manager's spends 15 minutes per day on daily emails, plus 1/2 hour per week and 1/2 hour per month to reflect on his/her performance.

There is no integration with an existing platform and no technical development is needed to implement the service.

## Pricing

The price for the service (including virtual assistant) is \$500/month per advisor, with a minimum of 6 months engagement.

Discounts on volume are available.