



Elevate your personal brand

Learnapalooza 2021
#curiosityunleashed

Teresa Schmedding, Wipfli content/communications

WIPFLI

We're going to talk about LinkedIn

All social channels have strengths and weaknesses, but LinkedIn is the best for business because it's the most trusted. And:

- ▶ It has 722 million members
- ▶ 33% of B2B decision makers research on LI
- ▶ 87% of B2B buyers on LinkedIn are introduced to salesperson by someone who was already in their professional network
- ▶ 3 people get hired on LinkedIn every minute
- ▶ 4 out of 5 people are decision makers



Digital networking

- Pandemic only enhanced shift to digital networking
- Networking strategy has to go beyond company channels
- Social is social – and that means it needs you to be social
- Your positive activity on social can:
 - ▶ Drive business growth
 - ▶ Deepen client relations
 - ▶ Support recruiting efforts
 - ▶ Support associate retention
 - ▶ Strengthen community ties

01. What your
profile says
about you



What your profile says about you



Silence is LOUD

When you say nothing, it tells people a lot.

Cathy's Activity

[All activity](#) [Articles](#) [Posts](#) [Documents](#)

Cathy Roberts
Assistant Store Manager at Kohl's

Followers 49

[Message](#)

Nothing to see for now
Content Cathy posts, shares, reacts to, or comments on will be displayed here

[Message](#) [More...](#)

Cathy Roberts · 1st
Assistant Store Manager at Kohl's
Greater Columbia, Missouri Area · [49 connections](#) · [Contact info](#)

Kohl's Department Stores
 University of Missouri

If you only auto share from Clearview

- You are only interested in talking *at* people.
- You are not interested in meeting/talking to people.
- You are not connected to people I know.
- You are not super trustworthy (you are a robot).
- (Think of this as cold call sales)



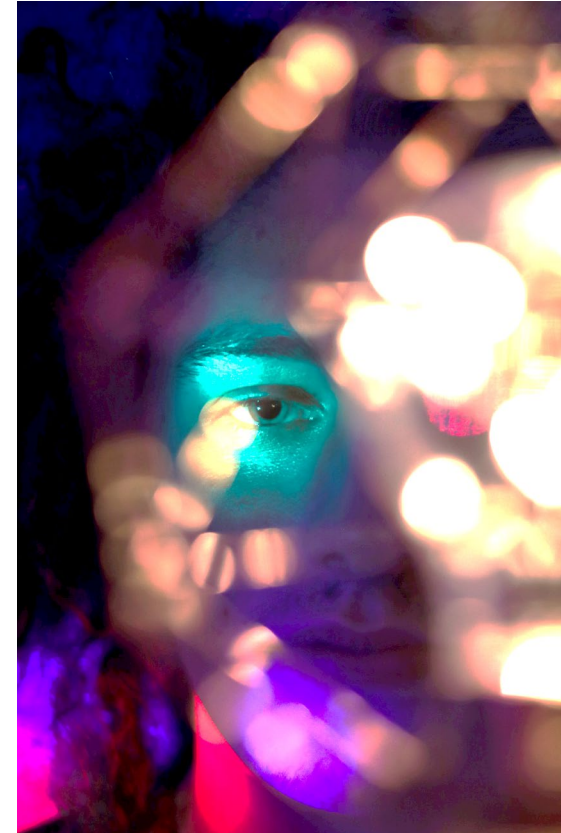
If you share Wipfli content with personal, organic message

- You are an interesting, informed person.
- You are trustworthy because you are showing me who you are.
- You're excited or proud of your work, your firm's work, your colleagues.

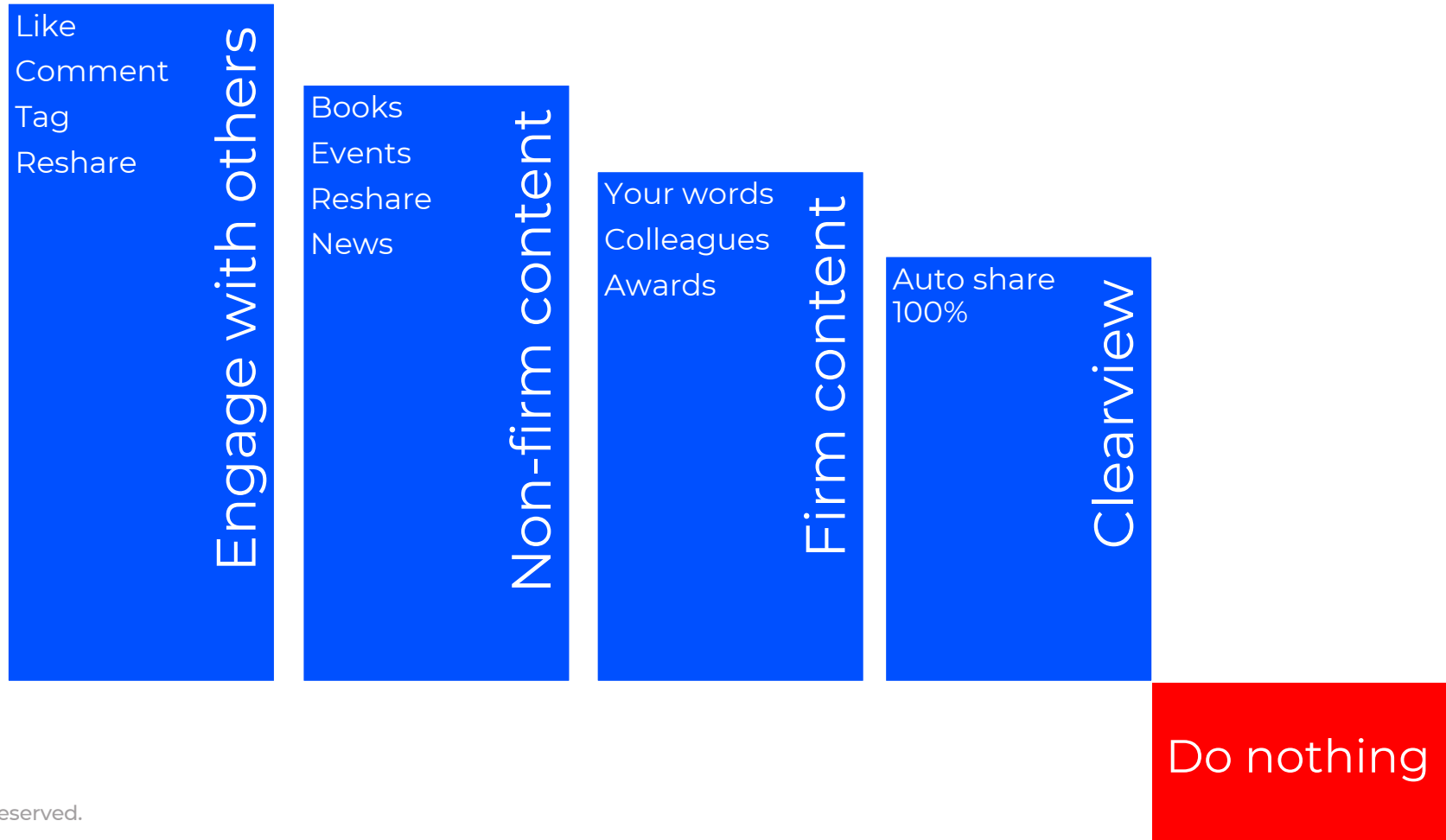


If you share non-firm content with personal message

- You are innovative.
- A leader in your industry.
- You are someone I can trust.
- You are someone I want to follow, learn more from.
- If I connect with you, it will benefit me or open new doors for me.



ROI on your social efforts



There's only one thing worse than silence

- Sharing bad, negative information
- Sharing personal opinions on divisive issues
- Using social to vent



A man in profile is looking at a tablet. The tablet displays a news website with various headlines. A white mug is on the table next to the tablet. The background is a bright window with a view of trees.

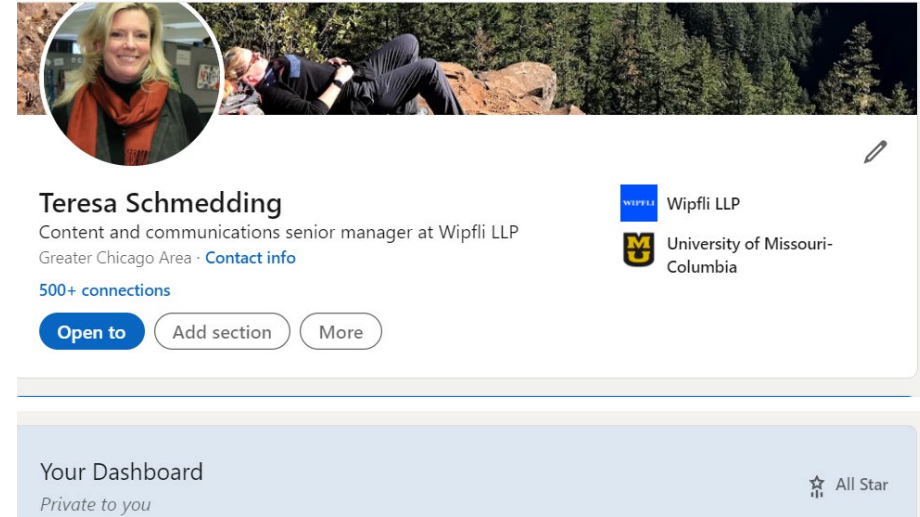
02. Your

profile

Types of LinkedIn profiles

5 levels of users:

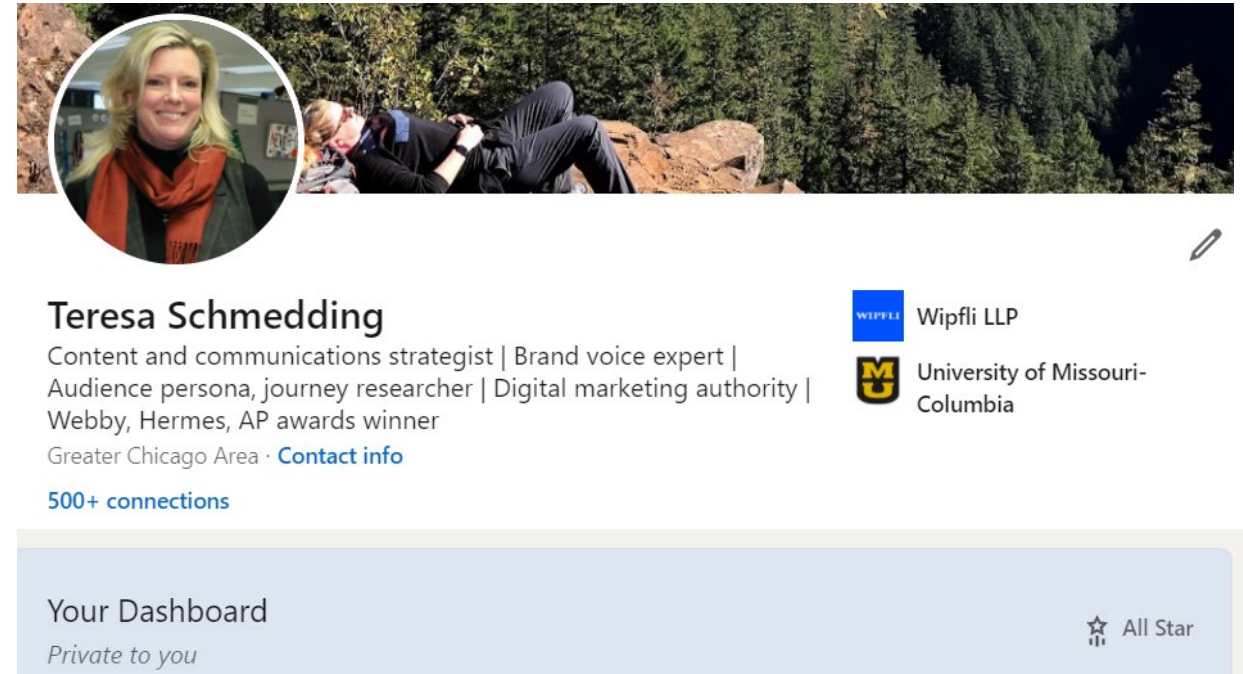
1. Beginner
2. Intermediate
3. Advanced
4. Expert
5. All-star



Do you know which one you are?

8 steps to all-star

1. Profile picture
2. Headline
3. Industry and location
4. Experience
5. Skills
6. Summary
7. Education
8. Connections



Teresa Schmedding
Content and communications strategist | Brand voice expert |
Audience persona, journey researcher | Digital marketing authority |
Webby, Hermes, AP awards winner
Greater Chicago Area · [Contact info](#)
500+ connections

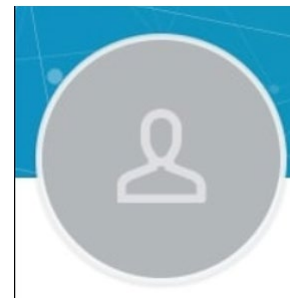
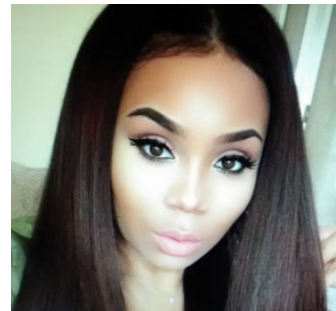
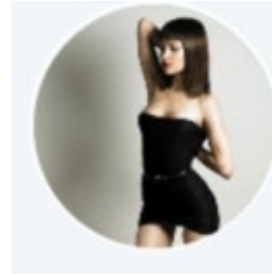
Wipfli LLP
University of Missouri-Columbia

Your Dashboard
Private to you

☆ All Star

1. Profile pictures

- Brightly lit
- Simple background
- Looks like you
- Creates a good first impression
- Balances between serious and goofy



2. Headline

2 goals

- ▶ Appear in searches
- ▶ Stand out

Avoid

- ▶ Don't just list job
- ▶ Avoid adjectives

Do

- ▶ Use vertical or horizontal dashes
- ▶ Add awards

Ashly Stewart (She/Her) · 1st

I tell stories. I like to help people. I get super hyped about Creative Briefs. Prince and fried chicken fuel me.

Indianapolis, Indiana, United States · [Contact info](#)

Teresa Schmedding

Content and communications strategist | Brand voice expert | Audience persona, journey researcher | Digital marketing authority | Webby, Hermes, AP awards winner

Greater Chicago Area · [Contact info](#)

3. Industry and location

Not complicated



Marshall Lund, CFP® , CPWA® · 1st
Private Client Practice Co-Leader - Chicago Market at Wipfli LLP |
Financial Life Wellness at Wipfli Financial Advisors
Greater Chicago Area · [Contact info](#)



Scott Hoyoss, SPHR, SHRM-SCP ·
Director, Field Human Resources at Wipfli LLP
Milwaukee, Wisconsin, United States · [Contact info](#)



Linda (DeVries) Haynes, SPHR · 1st
Senior Manager of Talent Development at Wipfli LLP
Madison, Wisconsin, United States · [Contact info](#)

4. Experience

- Need at least current position and two previous.
- Go beyond title to tell what you do/did.



Katie Cullen, CFP®

Chief Strategy and Innovation Officer at Wipfli Financial Advisors

Experience



Chief Strategy and Innovation Officer

Wipfli Financial A · Full-time

Jan 2021 – Present · 7 mos

Minneapolis, Minnesota, United States

Wipfli Financial Advisors, LLC ("Wipfli Financial") is an investment adviser registered with the U.S. Securities and Exchange Commission under the Investment Advisers Act of 1940; however, such registration does not imply a certain level of skill or training and no inference to the contrary should be made. We are not engaged in rendering legal, accounting, or tax services, and we recommend that all investors seek out the services of competent professionals in any of the aforementioned areas. Founded in 1999, Wipfli Financial is headquartered in Milwaukee, WI. We have offices in Illinois, Minnesota, Missouri, Pennsylvania and Wisconsin, and are proud affiliates of Wipfli LLP, a national accounting and consulting firm. Information pertaining to Wipfli ...see more



Executive Director | Growth | Learning & Education | Transparency Mergers & Acquisitions

Alliance for RIAs

Oct 2013 – Jan 2021 · 7 yrs 4 mos

National--United States

As Executive Director for the Alliance for RIAs (aRIA), I lead and manage a thinktank of eight powerhouse national wealth management leaders with a keen focus on inorganic growth. In an effort to deliver industry-leading expertise regarding growth and innovation, I lead meetings and calls with members throughout the year. I also work with members to find opportunities ...see more



CEO | Strategic Development | Executive Facilitation and Leadership | Institutional Relationships

Zero Alpha Group, LLC

Sep 2011 – Jan 2021 · 9 yrs 5 mos

National--United States

My work for Zero Alpha Group (ZAG), a financial services study group that allows philosophically aligned organizations to develop content and learning opportunities, has great breadth and depth. An active collaborator within every aspect of the business, I hold responsibility for strategic leadership, governance, institutional-level partnerships, and talent development. I am ...see more

5. Skills

Need to include at least 5.

- ▶ What you are good at.
- ▶ Look at 5-10 job postings on LinkedIn to see valued skills.
- ▶ Too many? Make sure you don't hide what's most important.



Kurt Gresens, CPA, CMA

Managing Partner at Wipfli LLP | Executive Leader — Audit, Tax, Consulting

Skills & endorsements

+ Auditing · 23



Endorsed by Randy Mahoney and 1 other
mutual connection



Endorsed by 3 of Kurt's colleagues at Wipfli LLP

+ Tax · 17

Bryan Hyska and 16 connections have given endorsements for this skill

+ Financial Analysis · 14



Endorsed by Terry Kerscher (mutual connection)

Industry Knowledge

+ Mergers & Acquisitions · 13

+ Financial Reporting · 13

+ Accounting · 12

+ Corporate Tax · 7

+ Finance · 7

+ Small Business · 7

6. Summary

The most challenging section. What's your elevator pitch? What story are you trying to tell? Who are you???

- ▶ What makes you tick?
- ▶ What is present role?
- ▶ Frame your past?
- ▶ Big successes
- ▶ Share character
- ▶ Life outside work

- At minimum, 3 parts:
 1. Opening statement: Summarize impressive, relevant skills – focus on keywords so you can be found.
 2. List achievements versus duties.
 3. Closing statement: What would someone get in touch with you for?



Katrina Ortiz • 3rd

Lead Software Developer at Insurance Technologies, Inc

Miami/Fort Lauderdale Area

Message

View in Recruiter



Insurance Technologies

Udacity

See contact info

154 connections

I caught fire coding.

I always thought my dream was to be a proofreader for a little indie publishing company, sipping my cafe con leche and reading the opening lines to the next best-selling vampire novel. It seemed like an appropriate dream given my BA in English. I gravitated toward proofreading and quality control positions and even started my own proofreading business. But I kind of just felt meh. I yearned to learn more, yearned to learn something different.

And that's when it happened; the spark I was missing ignited the instant I clicked play on my first Python tutorial video. (I mean seriously, how could it not be great when it's named after Monty Python's Flying Circus?) Since then, I can't get enough. Front-end web development calls to all my passions; it incorporates creativity and problem solving and I'm allowed to break it to improve the code (in a separate Git branch, of course).

I love selling brands. I hate selling myself. So here's six quick things about me and my work. In, out, nobody gets hurt.

1.) I've created campaigns for more iconic brands than you can shake an iPhone at. My longtime creative partner, Jag Prabhu, and I have produced work for Unilever. Verizon Wireless. Johnson & Johnson. AT&T. Pfizer. Nestle. Bristol-Myers Squibb, IBM, GlaxoSmithKline. US Airways... And we've gotten to schmooze with the leaders of these fine companies. Quite a rush.

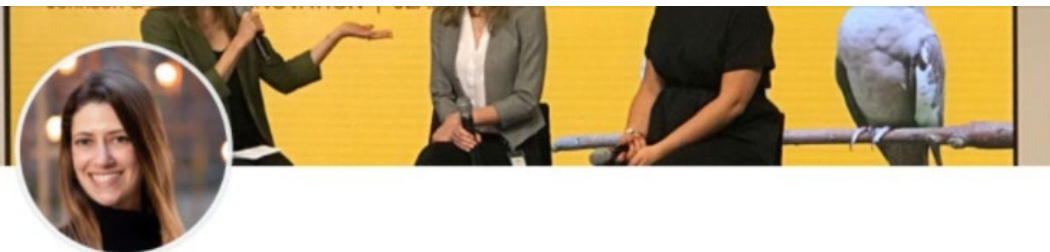
2.) I'm a digital junkie with 23,000 Twitter followers. I love every freakin' thing about the web.

3.) I got my job in advertising in an unusual way. I won a national writing contest called "Write If You Want Work", the brainchild of mega best-selling author James Patterson (Along Came A Spider, Kiss The Girls) then chairman of J. Walter Thompson. My prize? A job as a writer at the agency.

4.) Several years ago, right out of the blue, my funny, active, young(ish) husband was diagnosed with cancer. I mention it here because ever since, I like working on pharmaceutical ads. Some creatives shun them, but not me. It's powerful to connect with people over the things that make us human, vulnerable, imperfect.

5.) This is how I sum up my job. I help people fall in love with brands. Help agencies win new business. Build trust with clients to help their brands skyrocket. Period. Exclamation point.

6.) I don't like to advertise this fact, but I'd do this job for free. It's my passion. Also, aside from advertising, I'm completely unemployable.



Aliza Edelstein • 2nd

Product Marketing & Growth at SurveyMonkey

San Francisco, California

[Connect](#)

[View in Recruiter](#)

[More...](#)

SurveyMonkey

Columbia University
in the City of New...

See contact info

500+ connections

The human brain is a crazy place, and there are two things that fascinate me most about product and growth marketing. First: the concept of consumer logic and how rational yet irrational it can be. And second: the challenge of communicating in a way that persuades and convinces consumers always requires optimization—so you're optimizing for something that is both rational and irrational.

I apply the same thinking in product marketing that I also apply in leadership, because whether you're connecting with consumers or with your team, you're connecting with the fun irrationality of their logic—in order to bring ideas together, influence an outcome, and also optimize and scale for future growth.

Previously, I built and led the Demand Generation marketing team, bringing seven new products to market, and prior to joining SurveyMonkey, I worked in B2B marketing across the technology and financial services industries helping companies generate revenue.

About

I love to dig into customer problems and solve them with modern technology. I create, scale and optimize product portfolios that matter. To accomplish this, I focus on key results, build amazing teams and quickly adapt to new insights.

I have enjoyed many executive positions throughout my career in product management, product marketing, technical sales, engineering, and strategy. My personal and professional experiences have taught me the following about myself:

I can successfully create, scale and optimize software product portfolios from \$5M to \$1B in revenue.

- I put the customer at the center of all that I do.
- I excel at the execution of big ideas with given constraints
- My gut instinct is good but I seek data for my decisions

I can align, lead and grow world-class product teams from 10 to 100 people.

- I love to win, but helping the team win gives me greater joy
- I speak tech and exec
- I tell great narratives that motivate
- The buck always stops with me

I educate, refine and drive myself to be a better person

- I am constantly learning because I never settle
- I stay calm when faced with adversity
- I focus on making high-quality decisions

I enjoy meeting new people and hearing new perspectives. Reach out if you want to talk to me about emerging tech, creating software products or baseball.

Professional Skills

Product Management | User Experience (UX) Design | Product Analytics | Team Development | Market and Pricing Analysis | Strategic Planning | Product Development | Product Roadmap | Portfolio Strategy | Business Development | SaaS | Agile Development | Marketplace Platforms

Domain Knowledge

IT and Data Security | IT Management Software | Enterprise Software | Small Business Software | Digital Marketing | Digital Advertising

7. Education

College, certifications, licenses

Licenses & Certifications



Customer Experience Innovation

Northwestern University Medill School

Issued Aug 2021

Credential ID 36035408

[See credential](#)



Bystander Training: From Bystander to Upstander

LinkedIn

Issued Jul 2020

[See credential](#)



Skills for Inclusive Conversations

LinkedIn

Issued Jun 2020

[See credential](#)



Brand Management: Aligning Business, Brand and Behaviour

University of London

Issued Mar 2020

[See credential](#)

Education



University of Missouri-Columbia

Masters · Integrated strategic communications, management

2005 - 2009

Being an excellent editor got me promoted into management. Once there, I realized I knew very little about how to manage people, budgets and business plans. Mizzou's masters program is focused on tangible skills for leaders. Leadership is part instinct and part talent -- but it's mostly a learned skill. This program taught me that.



University of Missouri-Columbia

Bachelors · Journalism

1985 - 1989

The most important thing I learned at journalism school is how to view the world from several different perspectives at once -- and how to work hard. That ability to synthesize multiple viewpoints lead me from writing to design and from design to editing -- and now content strategy where personas and perspectives drives strategy.



8. Connections

At least 50 to make all-star


Find

- ▶ Anyone you meet at event
- ▶ Clients (client's team)
- ▶ Influencers in your industry
- ▶ Alumni

Message

- ▶ Introduce yourself
- ▶ How you found them
- ▶ Common ground

Amy Adams
Marketing & Business Development Strategist



Amy Adams · 1st
Marketing & Business Development Strategist

FEB 1

Amy Adams · 10:23 PM
Hi Teresa,

We're both connected at the AMA conference this week. I'd love to link up and have you in my network!

Amy

Tania Erdmann, SCPM, PMP, CSM
Leader - Strategy Implementation Office at Wipfli LLP




Tania Erdmann, SCPM, PMP, CSM · 1st
Leader - Strategy Implementation Office at Wipfli LLP

FEB 22

Teresa Schmedding · 9:45 PM
How have we not connected yet????

Abby Reid
Helping all Customer-Facing Teams Elevate and Enhance Their GTM Strategies



Abby Reid · 1st
Helping all Customer-Facing Teams Elevate and Enhance Their GTM Strategies

DEC 21, 2020

Abby Reid · 12:36 PM
Teresa - great to connect. Hope all's well over in Chicago!

JAN 22

Abby Reid · 9:27 AM
Hi Teresa - wanted to congratulate you on your promotion to content and communications senior manager. What a way to start 2021! How has the transition been working remotely?

What

to share



The average person spends how much time per day on social media?

- 3 minutes
- 2 hours, 25 minutes
- 4 hours, 3 minutes
- The average person does not use social media every day

Share who you are

Whether out of Clearview or on your own, share your knowledge through posts:

- Share your perspective on trending topics
- Share information from innovative leaders
- Share innovations in your industry/field
- Share what makes you excited to come to work
- Share what makes you proud of Wipfli
- Share what makes you proud of your colleagues
- Share what you like about your industry/profession
- Reshare content of people you want to be aligned with or want to know who you are
- Posts that make people want to work here or do business with us

Show who we are

- Posts that show who we are, the heart and soul of our firm, improve client relationships, improves reputation, increases brand equity, influences client trust
- Use hashtags to support branding and create resharing opportunities.
 - ▶ #WipfliGivesBack
 - ▶ #WipfliWay
 - ▶ #WeTheCurious
 - ▶ #LifeatWipfli
 - ▶ #MyWipfli
 - ▶ #OneWipfli

Examples of great posts

 **Joseph Chivini** • 1st
Manufacturing & Distribution - Growth Focused - Business Development, Seni...
3mo • 

So proud to be at a firm that understands marketing! #wipfliway
#socialmediamarketing #Chicagoland
<https://lnkd.in/e8N6gAB>

 **DSMN8 - The Employee Influencer Platform**
3,090 followers
4mo • 

+ Follow

Time to take a look at companies in North America!

Here at DSMN8, we're always on the lookout for companies whose er ...see more

The Most Active Accounting Companies on Social - North America

October 2020

RKL	26.72%
Wipfli	25.44%
Brown Smith Wallace	24.77%
Aprio	24.18%
LBMC	23.62%
Withum	21.55%
Frazier & Deeter, LLC	20.78%
PwC Interaméricas	20.08%
Anchin, Block & Anchin	19.95%
HORNE LLP	18.66%

 **Teresa Schmedding**
Content and communications senior manager at Wipfli LLP
1mo • 

I'm so excited about an upcoming series of cooking classes and tips at **Wipfli LLP** with **Monique Costello**. I'm also very grateful to work for a firm that invests in health and wellness (and happiness) of its associates. I cannot wait to see the recipes Monique created with the spices and oils that were a part of our holiday gift.
#WipfliWay #MyWipfli #wellness

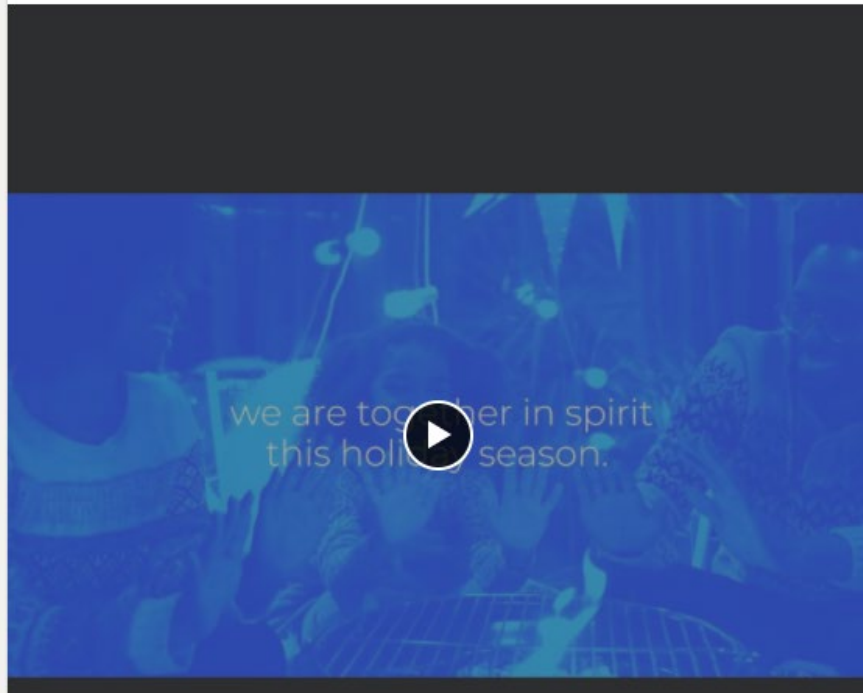




Ryan Risley • 1st

Principal and Chief Technology Officer - Business Solutions Group - Wipfli LLP
3mo • 🌐

I feel very fortunate in this unprecedented year to be surrounded by such an empathetic, passionate and talented group of humans. This includes those I serve alongside here at Wipfli and our partners, but most importantly those we serve... our clients... and those they serve AND their communities, together as one. Our collective goal with you is not to just survive COVID-19, but to thrive in it by connecting resources with needs, and helping those in crisis. Thank you for everyone's efforts and energy! 🙏 We will get through this, together. 🗨️🗨️
[#thankyou](#) [#leadingwithempathy](#) [#weareinthistogether](#) [#missiondriven](#) [#wethecurious](#) Wipfli LLP



Ciara Leahy, CPA • 1st

Senior Manager at Wipfli LLP
5mo • Edited • 🌐

6 years ago today I started working at Kessler Orlean Silver. I remember being incredibly nervous but excited for the future. I had been at my previous firm for 9 years. I picked KOS because they were local and had both a female partner and female senior managers. KOS merged with Wipfli in January 2018.

Fast forward to today. I am now surrounded by strong female leadership. I am also chair of our newly launched Business Resource Group - Women of Wipfli. I am grateful for the opportunities I have been given and for Wipfli's commitment to diversity equity and inclusion!

[#wipfli](#) [#wipfliway](#) [#diversityandinclusion](#)



Brian Blaha • 1st

Growth Focused | Future Driven
1mo • 🌐

Looking forward to collaborating with [Katie Cullen, CFP®](#) as we grow our Private Client and Wealth Management service offerings.



Katie Cullen, CFP® • 1st

Chief Strategy and Innovation Officer at Wipfli Financial Advisors
1mo • Edited • 🌐

"M&A, of course is the quickest way for firms to grow, but in the current environment of cutthroat and deep pocketed competition, hardly the easiest".
[Charles Paikert](#) thank you for the conversation about growth and how ...see more



Growth Strategies: The Holy Grail Of Wealth Management

familwealthreport.com • 3 min read



Wipfli LLP

14,142 followers

2d • Edited •

At Wipfli, we are dedicated to strengthening diversity in our industry, as well as at our firm. To further that goal, we have doubled our support for education programs with the [National Association of Black Accountants Inc.](#) and the [Illinois CPA Society \(ICPAS\)](#). [#TheWipfliWay](#) [#DEI](#) [#DiversityEquityInclusion](#) <https://lnkd.in/dsjTTey>



Wipfli doubles donations to diverse scholarship programs

wipfli.com • 2 min read



Wipfli CPAs and Consultants

29m •

...

Congratulations, Nik, on being named 40 Under Forty by the [Billings Gazette](#). Nik leads our national tribal gaming finance and accounting services team, where he pours his unending curiosity and passion for accounting and tech into helping our clients. <https://bit.ly/3q8ev4U> [#WipfliWay](#) [#WeTheCurious](#)



CONGRATULATIONS

Nik Wong

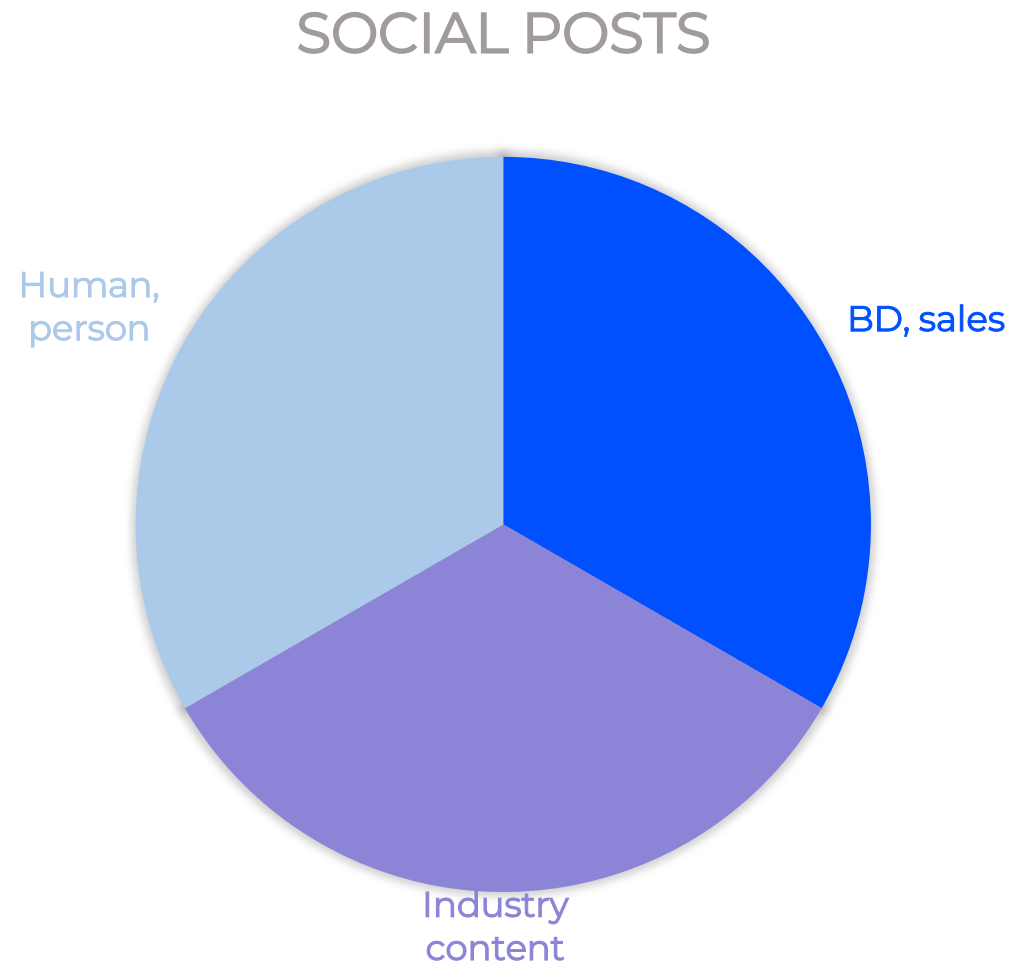
40 Under Forty



WIPFLI

Try to follow rule of thirds

- 1/3 BD, sales, link pushes
- 1/3 industry content
- 1/3 personal, human content



Doesn't have to be too personal

 **Brian Blaha** • 1st
Growth Focused | Future Driven
4mo • 

A little Wipfli action at Lambeau! (Sorry to my Bears friends!)



   100 • 11 comments

Don't forget

- Everything and nothing on social media speaks volumes about who you are and what you think about your firm.
- 8 easy steps to all-star profile.
- Treat posts the same as if talking in person.
- Your posts on social play a critical role in increasing our brand value and growing our firm.

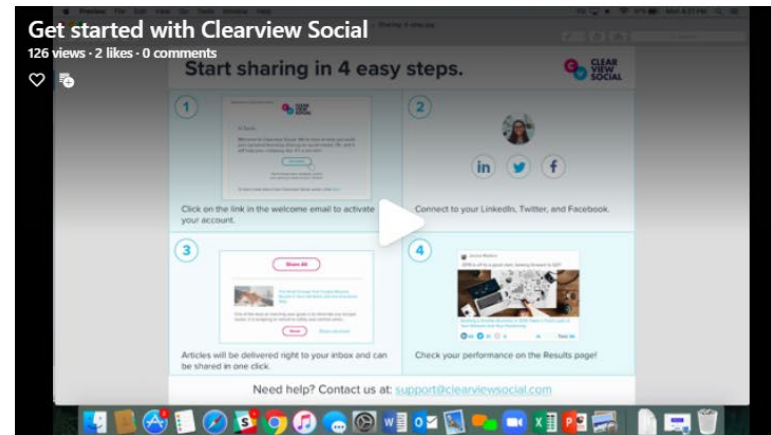


Questions?

For more information and tips on how to post, see our Social Media page on Insite under Growth/Marketing.



Clearview Social Training Video



Clearview Social FAQ

