

# Sales Agents LinkedIn Setup Checklist

Social pages are key to helping your sales agents build soft relationships with their customers. It helps customers and prospects stay connected with your sales agents, leave reviews, and share their information as a social media referral. The first step in building social networking is creating a strong social profile. Here is a checklist to help in getting a sales agent profile running.

- Profile Name – Include agency and agent NMLS number  
– “Jane Smith – First Bank – NMLS# 555555”
- Profile Photo – Professional Headshot
- Cover Photo – Branded Company image with Equal Housing Lender/FDIC/NCUA logos
- About Section
  - Personalize about section with the lender’s professional history and personalized elements - i.e. why they love their job, where they are from, how they are connected to the community, what they are interested in, etc. Tell your story.
  - Office Location
  - Be sure to highlight what lending company they are with (notate Company NMLS in parenthesis)
  - Website URL
  - Include agent NMLS number
  - Include FDIC/NCUA Insured and Equal Housing Lender verbiage
  - Notate the states in which lender is licensed to do business
  - Use service category language as appropriate (Mortgage Broker, Loan Services, Real Estate Services, Financial Services)
- List your relevant skills
- Connect page to Social Assurance app
- Obtain compliance approval prior to publishing page
- Once live, invite friends, clients and acquaintances to connect - sync your profile with your email address book
- Brush up on social selling best practices with [Social Assurance’s Social Selling eBook](#)

## Additional Items to Consider for your LinkedIn Profile

- Encourage endorsements and recommendations by endorsing others