



Advisor guide: Creating a successful professional profile

THIS GUIDE IS DESIGNED TO HELP YOU DEVELOP AND ENHANCE YOUR PROFESSIONAL PROFILE.

Stand out with business owner clients by clearly conveying the valuable insights, services, and partnership you provide to retirement plan sponsors and their employees. We provide you with specific elements of a successful profile along with techniques to help you create a profile that resonates with your target clients — plus steps for getting started.

Why your profile matters

Having a thoughtful, engaging professional profile that conveys the value you bring is an important way to reinforce the partnership you offer and help you to stand out with the clients you're best suited to serve.

- **Offer key facts.** Your profile should include professional qualifications — licenses and credentials, years of relevant industry service, awards, and recognition — as well as any other key details that demonstrate your ability to capably handle business owners' retirement plan needs.
- **Showcase your unique qualities.** In developing your professional profile, it's important to showcase the qualities that differentiate you and your practice. This may include information about your personal and professional background, why you do what you do, and how those experiences led you to work with business owners today. In short, your profile should help clients understand why they should work with you and what's in it for them.
- **Consider context.** Articulating the qualities that set you apart from other retirement plan advisors — by framing those attributes through the lens of what matters most to the business owners you're aiming to attract — can also help sharpen your ability to convey your value proposition when speaking to clients. Later in this guide, we will look at best practices to help you adapt your professional profile based on the various contexts in which you may be using it.

TAKE THE NEXT STEP:

- Review [ADP's Accelerate your value proposition worksheet](#), which includes a hypothetical example of an effective value proposition along with key questions to help you describe your value, based on what's most important to business owners today.
- Notice how the fictitious advisor highlights his or her background, strengths, and capabilities in ways that will resonate with the clients he or she wants to attract.

Elements of a successful profile

Above all, your profile should make it easy for clients to understand what you offer, why that's valuable to them, and how you're different from other retirement plan advisors. This means thoughtfully including details that are relevant and engaging to the clients you want to attract.

- **Focus on your target.** One effective way to start developing your profile is by imagining your audience. Who are they? What do they value? What's most pressing on their minds right now? Having a clear picture of the clients you are aiming to attract helps focus your profile.
- **Be clear and relatable.** Another important factor is clarity. Are you using words and phrases your intended audience will relate to and understand? This is especially important when describing how you serve the retirement plan needs of business owners and their employees. Showcasing your value in terms of sponsors' and participants' goals can help set your audience at ease and demonstrate that you understand what's most important to them.
- **Use your voice.** In addition to using language nonfinancial professionals can understand, be sure your profile sounds like you. When you read your profile out loud, does it sound like something you'd actually say to a client? Staying true to your own voice and communication style — while remaining professional, of course — gives clients an opportunity to get to know you and deepen your connection.

TAKE THE NEXT STEP:

- Write down key facts and profile information you want to include. Look for opportunities to showcase specific details that will help you stand out with clients.
- Get feedback on your profile by sharing it with trusted colleagues and select clients. Ask: *Does this profile accurately and clearly reflect the value I provide? Does this profile sound like me?*

Outline your process

An effective professional profile should also offer specific details on the services and attention you provide business owners and their employees. This gives you an opportunity to showcase your strengths and capabilities, while helping clients understand what they can expect from you and your team.

Here's a sample of the services and you might consider including, depending on how you choose to work with sponsors and participants.

Examples of discovery, search, and provider selection services:

- Needs assessment
- Plan and vendor evaluation
- Compliance review
- Solicit proposals from providers
- Proposal evaluation
- Vendor presentations
- Match business needs to vendor capabilities
- Finalists' presentations
- Selection of plan provider

Examples of plan implementation services:

- Coordination and plan execution
- Communication of business needs to provider
- Documentation of investment policy statement
- Analyze plan participants' needs and behaviors
- Investment selection
- Ongoing evaluation of investments

Examples of participant engagement, education, and enrollment services:

- Help employees understand benefits
- Support participants' investment choices
- Help maximize employee participation
- Ongoing retirement planning education
- Conduct enrollment meetings

Examples of ongoing services:

- Annual plan reviews
- Investment policy statement reviews
- Monitoring industry trends
- Service, support, and problem resolution
- Ongoing communications (newsletter, webinars, etc.)

TAKE THE NEXT STEP:

- Document your current process for helping business owners select and manage their retirement plans. Highlight any areas where you and your team offer particular experience or insights, and how you stand apart from other retirement plan advisors.
- Review descriptions of your process for clarity to ensure clients can understand *what to expect when working with you and your team; how that aligns to their needs; and why those services are valuable and necessary for the success of their business and employees.*

Presenting your profile

A professional profile can be used in many different contexts to help you build your practice, convey your value proposition, and describe your strengths, services, and capabilities. There are several best practices for adapting your profile based on how you're using it — keeping in mind that certain elements should remain consistent regardless of how and where it appears.

- **In-depth introduction.** When using your profile as part of a proposal for new clients, or as a printed or online document outlining your practice and services, you'll likely want to include as much detail as possible about who you are and what you do. In this scenario, you'll probably feature in-depth descriptions of your process (e.g., plan and investment selection, participant engagement), as well as longer-form professional details for you and your team members. This is probably the most formal use of your professional profile and a situation where more information — though still presented through the lens of business owners' needs and concerns — is going to be welcome and necessary.
- **Team website.** When reading about you online, clients are more likely to want a high-level overview of your background, skills, capabilities, and why they should work with you. You'll want to make this information easily scannable — consider a mix of summary bullet points at the top, accompanied by 3-5 short paragraphs. Also, if your website features profiles for multiple team members, try to make the tone and presentation consistent for all. For instance, consider writing them in a more formal third-person style.
- **LinkedIn.** Of the three contexts provided here, LinkedIn (and social media in general) is typically the least formal — though you'll still obviously want to maintain your professional voice and tone. Your LinkedIn profile can be shorter than the other two, using more bullet points to describe who you are and the services you provide. Readers also generally expect you to present this version in the first person (e.g., "My team and I have been providing retirement plan services to companies for 20 years.").

TAKE THE NEXT STEP:

- Understand your firm's compliance and marketing policies related to communications with the public. You'll want to pay particularly close attention to any policies governing online or social media communications.
- Plan with your team to regularly check back (at least once a year) to review and update your profiles across various marketing communications, websites, and social media platforms.

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