



**WARD & DEAN**  
EXECUTIVE BANKING CAREERS | STRATEGY | HEADHUNTING

# Your LinkedIn Profile IS Your Pitch Deck

A Field Guide for Commercial Banking Relationship Managers

Most commercial bankers are leaving a room full of prospects completely dark. This guide shows you how to turn on the lights.

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# Right Now, Someone Is Googling You.

Before a prospect agrees to a meeting, takes your call, or responds to your email — they look you up on LinkedIn. What do they find?

## Blank Blue Banner

Zero information. Zero impression. Zero reason to keep reading.

## Blurry Headshot from 2011

Or worse — no photo at all. The algorithm buries blank profiles immediately.

## Generic Job Title Headline

"Senior Relationship Manager at [Bank Name]" — tells prospects absolutely nothing.

## Résumé-Speak About Section

"Experienced banking professional with a demonstrated track record of..." Written for no one.

"86% of B2B buyers check your LinkedIn before agreeing to a first meeting."

That profile isn't working for you. It's working against you.

# LinkedIn Is the #1 B2B Lead Generation Platform on the Planet



THE OPPORTUNITY IS MASSIVE

80%

B2B Social Leads

of all B2B social media leads come from LinkedIn — no other platform comes close

89%

Top Lead Gen Channel

of B2B marketers say LinkedIn is their #1 lead generation channel

2.74%

Conversion Rate

LinkedIn visitor-to-lead conversion rate vs. only 0.77% on Facebook

36M

Financial Professionals

financial services professionals are already active on LinkedIn right now

① Your future clients are already there. The only question is whether they can find — and trust — you.

# Generic Banker vs. Fully Optimized Banker



Two profiles. Same industry. Completely different outcomes. Here's what separates the invisible from the inbound-ready.

## ✗ BEFORE — THE GENERIC PROFILE

### Default LinkedIn Blue Banner

Zero information. Zero personality. Zero reason to stay.

### Small, Dark, Outdated Photo

Or missing entirely — the algorithm buries blank profiles.

### Headline: "Senior RM | ABC National Bank"

Pure org chart. No differentiation. No client value.

### About: "Demonstrated work history..."

Résumé-speak written for no one in particular.

⊗ Result: Invisible. Forgettable. Scrolled past.

## ✓ AFTER — THE OPTIMIZED PROFILE

### Custom Banner with Value Statement

Name, specialty, niche industries, and a clear one-line promise.

### Professional Headshot — Warm, Confident

Eye contact, clean background, business professional. Trustworthy.

### Headline: "Helping Mid-Market CFOs Access Capital Faster"

Client-facing. Outcome-driven. Deal size and industries included.

### About: First-person story with a CTA

Who you help, what you do, and exactly how to reach you.

✓ Result: Trusted. Credible. Memorable. Inbound-ready.

# Your Digital Billboard — 1,584 × 396 Pixels of Prime Real Estate



67%

Leave It Blank

of LinkedIn users never customize their banner — including most commercial bankers

5×

More Engagement

boost in profile engagement when you add a custom, professional banner

What a Great Commercial Banker Banner Includes:



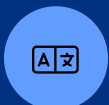
## Name & Specialty

Reinforce your identity visually — name and specialty front and center



## Niche Industries

Manufacturing | Healthcare | Distribution | Real Estate



## Clear Tagline

"Helping business owners access the capital they need to grow"



## Professional Palette

Navy, charcoal, white — clean, credible, banking-appropriate



**Ward & Dean Insight:** Your banner is the first thing a prospect sees. Make it say something.

# First Impressions in 0.1 Seconds



The human brain forms a first impression in **100 milliseconds** — before a single word is read. Your photo is doing more selling than you think.

21×

More Profile Views

with a professional photo vs. no photo

9×

More Connections

more connection requests received

36×

More Messages

from prospects and referral partners

## ✓ What Makes a Great Banker Headshot

- Neutral background — no busy offices
- Business professional attire
- Warm, confident smile — approachable, not stiff
- Shoulders-up framing, fill the frame
- Recent — within 3 years

## ✗ What Kills the Impression

- Vacation photos or casual selfies
- Group photos cropped awkwardly
- No photo at all — the algorithm buries blank profiles

⚠ Budget \$150–\$300 for a local photographer. This is the highest-ROI investment in your personal brand.

# 220 Characters to Change Everything



LinkedIn auto-fills your headline with your job title. Almost everyone accepts the default. **Don't.** Your headline is your hook — make it client-facing, not résumé-facing.

## ✗ BEFORE — GENERIC

"VP, Commercial Banking | ABC National Bank"

Tells prospects nothing. No differentiation. Pure org chart. Could be anyone at any bank.

## ✓ AFTER — OPTIMIZED

"Helping Mid-Market Business Owners Access Growth Capital | Commercial Lending | \$5M–\$75M Lines & Term Loans | Manufacturing · Distribution · Healthcare"

Speaks directly to the client. Names who you serve. States the outcome. Signals deal size. Uses searchable keywords.

## Why the Optimized Headline Works:

### → Speaks to the Client, Not HR

Prospects immediately see themselves in your headline — "that's me, I need that."

### → Qualifies Prospects Automatically

Stating deal size (\$5M–\$75M) filters out the wrong conversations before they start.

### → Appears in LinkedIn Search Results

Industry keywords mean CFOs and owners searching for lending help find *you*.

✓ Optimized headlines generate **40% more profile views per week.**

# The About Section: Your 2,000-Character Pitch



Nobody cares about your work history. They care about what you can do for them. Here's the difference between what most bankers write — and what actually works.

## ✗ WHAT MOST BANKERS WRITE

"With over 20 years of demonstrated banking experience, I have built a track record of serving commercial clients across multiple sectors with a commitment to excellence and relationship-based service delivery..."

Reads like a résumé. Written for no one. Could be copy-pasted from any banker's profile in America.

## ✓ WHAT ACTUALLY WORKS

Write in **first person**. Answer three questions:

01

### Who Do You Help?

"I work with owners of established businesses — typically \$5M to \$100M in annual revenue..."

02

### What Problem Do You Solve?

"...who need a banking partner that actually moves fast and picks up the phone."

03

### What Should They Do Next?

"If you're outgrowing your current bank or preparing for a major capital event, reach me at [email] or book 15 minutes at [link]."

① **Always end with a CTA.** Your About section without a call-to-action is a pitch without a close.

# The Numbers Don't Lie



Every element of your LinkedIn profile compounds. Here's what the data says about what happens when you optimize each piece:

| Profile Element Added   | Measurable Result                |
|-------------------------|----------------------------------|
| Professional headshot   | 21× more profile views           |
| Custom banner           | 5× more profile engagement       |
| Optimized headline      | 40% more weekly views            |
| Complete profile        | 40× more opportunities           |
| All-Star profile status | 27× more likely to be discovered |

❏ **Ward & Dean Insight:** Your LinkedIn profile is the only marketing asset you personally own — that works 24/7, costs nothing, and can be found by any CFO, owner, or referral partner in your market at any moment. Most of your competitors haven't touched their profiles in years. **That's your edge.**

# How to Go From Invisible to Inbound in One Afternoon



Five steps. One afternoon. A profile that works as hard as you do.



## Step 1 — Get a Professional Headshot (Day 1)

Book a local photographer or use a good smartphone + window light. Budget \$150–\$300. This is the highest-ROI investment in your personal brand.



## Step 2 — Build Your Banner in Canva (Day 1–2)

Go to [canva.com](https://canva.com) → "Create a Design" → "LinkedIn Banner." Choose a navy template. Add your name, title, niche, and one-line value statement. Free. Takes 20 minutes.



## Step 3 — Rewrite Your Headline (30 minutes)

Click the pencil icon on your profile. Start with who you help. Follow with what you do. Add deal size and industries. Stay under 220 characters.



## Step 4 — Write Your About Section (1–2 hours)

Draft in a Word doc first. Who do I help? What problem do I solve? Why am I different? What should they do next? First person. Conversational. End with your email and a calendar link.



## Step 5 — Add Featured Content (30 minutes)

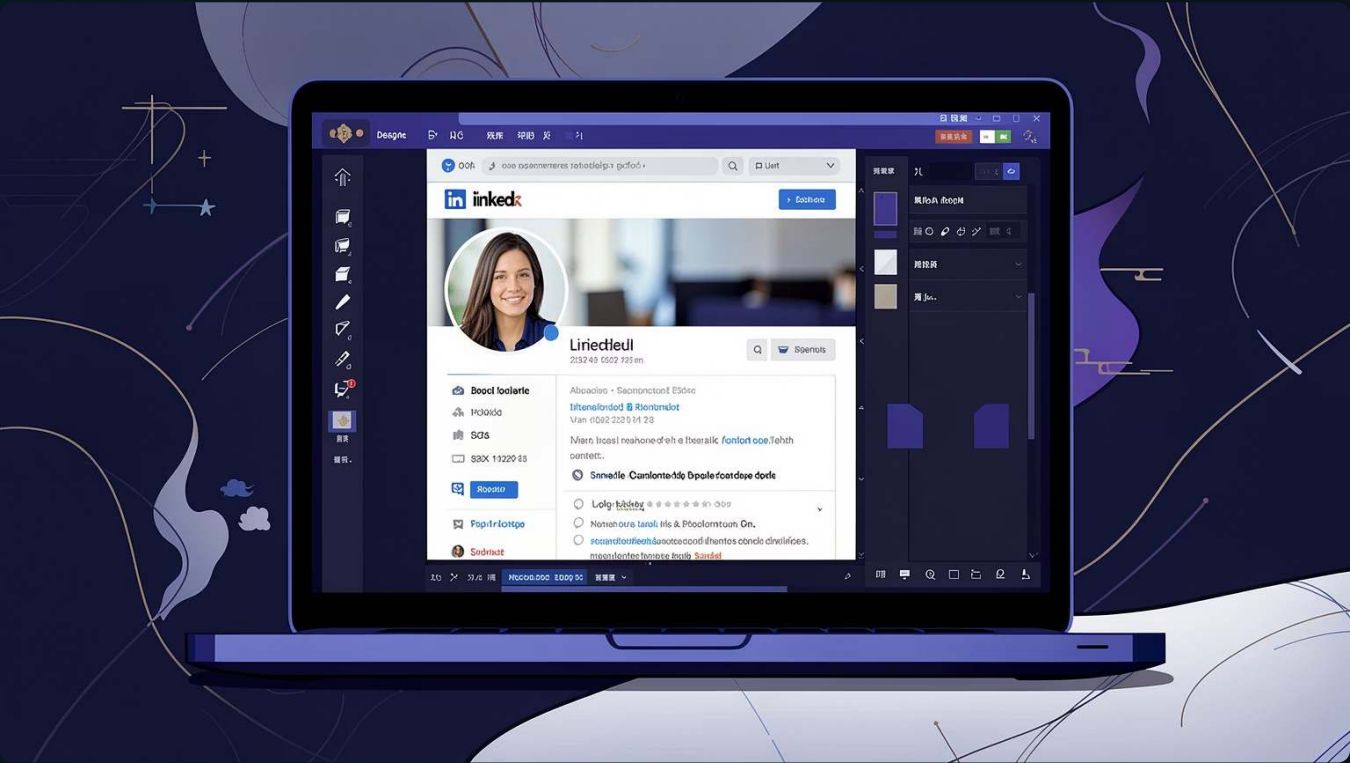
Pin 1–3 items: an anonymized case study, a deal tombstone, market commentary, or a link to your bank's commercial lending page.

# Building Your Banner — No Design Skills Required



## CANVA BANNER WALKTHROUGH

A step-by-step guide to creating a professional LinkedIn banner in 20–30 minutes. Zero design experience needed.



01

### Open Canva

Go to [canva.com](https://canva.com) → click "Create a Design" → search "LinkedIn Banner" → select 1584 × 396

02

### Choose a Template

Browse templates → filter by "Professional" or "Corporate" → choose navy or dark blue

03

### Edit Your Text

Click text to edit → add your name, title, specialty niche, and tagline

04

### Apply Brand Colors

Navy #003366 | White #FFFFFF | Gold accent #C9A84C — classic banking palette

05

### Clean Up & Export

Delete clutter → keep it clean → Download as PNG → LinkedIn → Edit background photo → Upload

✔ **Time: 20–30 minutes. Zero design experience needed.**

# A Word on Compliance — Stay in the Lines



Most banks have social media policies. Here's how to navigate them confidently and stay on the right side of your compliance team.

## ✓ Generally Permitted

### Personal Expertise Profiles

Personal profiles reflecting your expertise — generally fine across all institutions

### Specialty & Deal Type Descriptions

Describing your specialty, deal types, and client types — typically permitted

### Thought Leadership Content

Sharing market commentary and thought leadership — actively encouraged

### Official Bank Page Links

Linking to your bank's official lending pages — typically approved

## ⚠ Check with Compliance Before:

### Bank Logo Usage

Using your bank's logo on your personal banner

### Rates & Products

Quoting specific rates, products, or promotional offers

### Client Details

Sharing client names, deal details, or transaction specifics

① **The rule of thumb:** Write your profile like a professional bio — not an advertisement. Build credibility and connection, not a product pitch.

# The Commercial Banker LinkedIn Audit



Your profile checklist — do this today. Work through each section and check off every item. This is the difference between a profile that sits idle and one that generates inbound.

## The Essentials

- ☐ Professional headshot (within last 3 years)
- ☐ Custom banner with name, title, niche, and tagline
- ☐ Headline rewritten — client-facing with deal type and industries
- ☐ About section in first person with CTA and contact info
- ☐ Featured section has at least one pinned item

## The Upgrades

- ☐ Skills: Commercial Lending, Credit Analysis, Treasury Management, key industries
- ☐ Recommendations: 2–3 from clients or referral partners
- ☐ Contact info: direct email and phone visible
- ☐ Posting at least once every 2 weeks
- ☐ Custom LinkedIn URL: [linkedin.com/in/yourname](https://www.linkedin.com/in/yourname)



🟢 **The Power Move:** Your profile works while you sleep. Set it up once. Let it run. One afternoon of effort compounds into years of inbound opportunity.

STOP BEING A SECRET



# The Best Commercial Bankers in Your Market Are Building Reputations That Arrive Before They Do.



## A First Impression That Works at 11pm on a Sunday

Your profile never sleeps. It's meeting prospects while you're off the clock.



## A Credibility Signal No Business Card Can Match

A fully optimized profile communicates expertise, focus, and professionalism instantly.



## A Lead Funnel That Runs While You're in Client Meetings

Inbound inquiries from CFOs and owners who found you — and already trust you.



## A Referral Engine for Your COI Network

Helps centers of influence remember exactly who to send deals to — and why.

You've spent years building expertise. It's time your LinkedIn profile shows it.  
**One afternoon. Five steps. A profile that works as hard as you do.**

## TALENT

### → Career Navigation

Strategic guidance for your next move in commercial banking

### → Market Intelligence

Real-time insight into who's hiring and what they're paying

### → Compensation Analysis

Know your market value before you negotiate

### → Discreet Market Introductions

Confidential access to opportunities that never post publicly



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[Candidate Testimonials](#)

[Client Testimonials](#)

## BANK EXECUTIVES

### → Exclusive Access

Candidates you won't find on job boards — pre-vetted and relationship-sourced

### → 93% Retention Rate

Placements that stick — because fit matters as much as credentials

### → #1 in Commercial Banking

The most trusted name in commercial banking executive search

### → 25 Years Experience

A quarter century of relationships, results, and market expertise