

Ron Jones & David Worsfold

# Guide to Getting started on Twitter

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Incisive Guides  
Getting started  
on Twitter

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03

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There's a lot of buzz right now about Twitter, which has emerged as one of the most popular social media tools. This *Incisive Guide* is for those who are just getting started with Twitter or who simply want to know what it is and how it works. It will cover everything you need to know about setting up and using a Twitter account and share some tools and resources to help you leverage Twitter to market yourself or your company.



# About the sponsor

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About the  
sponsor

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[twitter.com/Barings](https://twitter.com/Barings)



# Understanding Twitter and how to set up your account

RON JONES

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## What Is Twitter?

Twitter is a social media tool that lets users send out short messages (or “tweets”) that are picked up and read by anyone who decides to follow you. This is also referred to as micro-blogging. One of the main reasons that Twitter is successful is because you have to keep your message to 140 characters, forcing users to be succinct.

Some people have started a Twitter account, sent out a message or two, and then wondered what the big deal is. The big revelation for me came when I found all of the supporting applications and tools that are now available to support and manage Twitter. Once you start using some of these tools, the light will come on and you’ll find many uses for Twitter. Here are a few:

- **Personal promotion and broadcasting**
- **Business promotion and broadcasting**
- **Reputation/brand monitoring**
- **Competition monitoring**
- **Event monitoring**
- **Information gathering/research**
- **Sharing content/links/ideas**
- **Search engine**

## Setup

The mechanics of setting up Twitter are relatively straightforward. Just go to Twitter’s site (twitter.com) and click the “Join” button. But before you do, it’s important that you take time to consider a few things before you send out your first “tweet”.

First, think about what you want to accomplish and how you want to be perceived. What is your brand strategy – personal or business?

When picking a user name, consider using your name or your company’s name instead of a nickname. This will allow people to know who you really are. This is important if you’re interested in branding yourself or your company. Also, a real name or company name allows people to find you easier and builds trust quicker.





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Here are some tips for setting up your Twitter account:

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### 01 Personal Biography:

Consider what to use as your profile description. Again, Twitter forces you to keep it short – 160 characters to be exact. Use a couple of professional statements (or more) followed by a personal statement. For example, my bio is: "Internet Marketing Specialist, Trainer, Speaker, Columnist and Avid Cyclist." Regardless, let people know who you are and what you do so potential followers have enough information to decide if they want to follow you. If it is a brand account rather than a personal account you still need to give clear reasons as to why people should follow you.

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### 02 Profile Picture:

Please take the time to get a real picture of yourself or company logo. You won't be taken seriously if you use one of the default pictures. Think of how you want to be perceived. A professionally shot photo of yourself can go a long way to promoting your personal brand. Smile and give followers some insight into your personality: be creative. Headshots – loosely cropped – stand out more when your picture has to be condensed to fit within some of the applications that support Twitter.

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### 03 Background Picture:

Next is your background picture. Twitter has some template backgrounds you can use. Pick something that is contextual to your brand strategy. Create your own if you really want to stand out. If you do, remember that people use various screen resolutions, so you need to make it big enough it doesn't tile (unless that is the effect you want).

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Chapter 1  
Understanding  
Twitter and  
how to set up  
your account

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Background picture

Profile picture

Twitter doesn't give you much space for your biography, so you can use the left side of your custom background picture to display more information about yourself, like your blog or another related website.

Personal biography





# Tools to help you get the most out of *Twitter*

RON JONES

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‘Who to follow’  
tool

## Following and Listening

You’re almost ready to start tweeting. But first, here are a couple more things to consider. Find people who have similar interests to you and “follow” them. In the top menu on your “Settings” page, select “Find people” and search for friends or companies you’d like to follow. Now look at all of those tiny picture icons representing people they’re following. Click “view all” to see the entire list. Click on anyone you’d also like to follow. In short order, you’ll be following 30 to 40 people. At this point, just take the time to “listen” to the conversation. See what’s being said and how it’s said, especially by people or brands you would like to emulate. You’ll probably see some strange language or symbols like “RT”, “@” or “#”. Don’t worry about this yet, just get a feel for the conversation.

## Building Relationships

Before you begin tweeting, think about your conversation and what you can provide to your followers that will give them value. You’re basically building relationships. To do so, you need to give before you receive.

People like reading tips, statistics, opinions, and links to relevant articles. Once you have a good feel for the style and content of your messages, tweet away.

Once you have identified a reasonable number of people to follow, Twitter will start helping you find more. On the right-hand side of your home page is a column headed “Who to follow”. Just click on the “View all suggestions” line and you will get a list of other people to follow similar in interest, topic or area to you.

Now that we understand Twitter, its benefits, and how to set it up, it’s time to introduce you to tools and resources that will help you make the most out of Twitter.

There are too many tools to review, with more coming out every day. My goal is to help you get started with the basics. Then you can use Twitter to help you find all the resources and tools that will make you a pro.



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Chapter 2

Tools to help  
you get the  
most out of  
Twitter



## Tools for managing your tweets

Managing your tweets can be a challenge. When I started using Twitter, I was unimpressed with the lack of tools and capability from Twitter's site. A recent revamp has improved the management tools, but you may still find it difficult to cope with all the information to start with.

Most of us like to use an application like Microsoft Word, which is self-contained with all the right tools. Twitter is just the reverse. Twitter's strength lies in using all of the external tools and applications, each with their unique approach to enhancing your Twitter experience. The first tool I'll share with you is TweetDeck. This application allows you to view all of your friends' tweets in columns. The neat thing about TweetDeck is that you can group your friends into themes. Looking at just one column of "all" of your friends tweets can be overwhelming. I like to create one column (or group) for search-related tweets, one for friends, and one for my favourite sport of cycling.

You can also perform a search of all public tweets for a given keyword or keywords, and save that search as its own column. That's useful to both for reputation management and for discovering users with similar interests to yours.

TweetDeck also provides a one-stop shop to help you craft your tweets, shorten your tweets to fit the 140-character allotment, and even translate tweets from another language.

Another notable tool to consider is 'twhirl', which has similar functionality, but at this point is not as versatile.

If you use an iPad, iPhone or a smart phone that lets you surf the Internet, you're in luck. Several tools will help you follow your tweets while you're on the road. There are even widgets (Mac OS), sidebars (Windows OS) and other kinds of tools you can use. For a list of all of these tools, go to the Twitter applications page.

## Finding People and Companies on Twitter

The first place to start searching for people is Twitter Search. This allows you to find people you might want to follow, search by topic, or find a company.

Another useful site is 'Who Should I Follow?' A good resource for more tools and tips is TopRank's marketing blog post on "12 Ways to Find Brands and Companies on Twitter."



7 Who should I follow? website

9 TopRank website

8 Twitter Search



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Chapter 2

Tools to help  
you get the  
most out of  
Twitter



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## Understanding the lingo

Now that you've been armed with tools to get up and running, we'll review a few simple terms you need to know. When I first started looking at tweets, it seemed as if everyone was speaking in code. Let's demystify some of the most common signs, so it all makes more sense.

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### @ sign:

Use the "@" sign if you want to "talk" directly to someone and let everyone see your tweet. For instance, if you were to send me a tweet, it would look like "@ron\_jones thanks for the New to *Twitter* guide."

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### RT:

RT is short for "retweet." If you read a tweet that you'd like to share with your followers, you would put an "RT @username:" in front of the tweet and then send it on. This lets people know who originally started the tweet and, in a manner of speaking, gives them the credit. It's a good practice to retweet often. Tools like TweetDeck provide simple tools to help you retweet, as does the latest version of Twitter itself. Remember, retweeting adds more characters to your tweet, so you might need to shorten it to make it fit into the 140 character limit.

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### # sign or hashtags:

This sign is called a hashtag and is used to label parts of your message. Take *Search Engine Strategies New York* for example. The conference organizers designated "#sesny" as the official hashtag. Everyone who was tweeting in context to this conference put "#sesny" somewhere in their tweet. So if you wanted to keep up with the goings on at this conference, you could just do a search on "#sesny" to get all of the tweets related to the conference. Or, maybe you watch "American Idol" and want to monitor real time tweets about everyone's opinion of idol contestants, or even the judges. Just search for the "hashtag #idol". Cool, huh? For more information and to search "hashtags" go to [hashtags.org](http://hashtags.org).

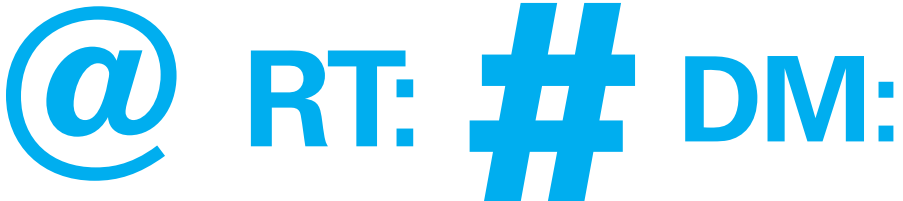
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### DM:

This stands for direct message, which is the *Twitter* equivalent to e-mail. You can only send direct messages to your followers. If you want to automatically set up direct messages to thank people for following you, you can use the free tool 'TweetLater'.

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"Tวิตtonary" and "Sitemasher" also provide explanations of various Twitter lingo. Now that you're armed with these new tools and a basic understanding of Twitter lingo, it's time to take your tweets to a new level.



# Tips on tweet etiquette and how to tweet

RON JONES

As you advance from novice to power Twitterer, let me pass on some final words of advice and more tips and tools to help you along your way. First, think of others before yourself. Give before you receive. Find relevant articles, tips, or helpful opinions and tweet about them. Then every once in a while, go ahead and plug yourself or your company. This is the formula for a successful tweeting campaign.

You'll find more gems of wisdom from Lauren Roth's "101 Twitter Guidelines."

## How to find good articles and the latest news

So how can you find good current articles that you can use to share with your followers? Or maybe you just want to stay up on the latest news in real time. There are several good sources.

Here's a list of tools you should check out that leverage the Twitter network and provide you the latest buzz:

- **Twitt(url)y**
- **Retweetist**
- **Tweetmeme**
- **Tweetlists**

Lee Odden at *TopRankBlog* talks about each of these tools and also provides some helpful tips.

Another useful tool is 'TweetBeep'. This tool allows you keep track of any keyword mentioned on Twitter. You basically set up the keywords you want to track and 'TweetBeep' will send you any

tweets included in your keyword set. This is great for reputation management, keyword research, and competition analysis.

## How to automate *Twitter*

If you're like me and stay busy 16 hours in the day, you might appreciate *TweetLater*. This excellent tool schedules your tweets so they get staggered throughout the day. People will wonder how you have the time to tweet all day long. Another feature is the ability to set up actions like automatically following anyone who follows you. Or automatically send welcome Direct Messages (DM) to your new followers. A very handy tool.

## How to shorten and measure your URLs

With only 140 characters, you have limited space in which to add links to cool articles you've found. There are several URL shortening services, with more on the rise. Furthermore, you can use tracking tools like *bitly* or *snipurl* to track click-throughs. Find out how many people retweeted your post and how popular it became. Over time, you'll learn what kind of links your followers like the most.

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Chapter 3  
Tips on tweet  
etiquette and  
how to tweet

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► .....  
**Monetising Twitter**

People are now asking how to monetise Twitter. This topic is on everyone's mind lately. It isn't as straightforward as anyone would like, but new models are emerging all the time.

Twitter might not be a strategy in and of itself, but it's a great tool to support many of your internet marketing efforts and can be very effective.

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**Continue the conversation**

That's it for this beginner's guide to Twitter. I've enjoyed pulling all of these tips, tools, and resources together for you. Follow me on Twitter (@ron\_jones) and we can continue the conversation. I'll be happy to answer any questions or discuss new tools and uses for Twitter.

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**Useful Links:**

- Twitter** [twitter.com](http://twitter.com)
- Ron Jones** [twitter.com/ron\\_jones](http://twitter.com/ron_jones)
- TweetDeck** [tweetdeck.com](http://tweetdeck.com)
- twhirl** [twhirl.org](http://twhirl.org)
- Twitter applications page**
- Twitter Search** [search.twitter.com](http://search.twitter.com)
- Who should I follow?** [whoshouldifollow.com](http://whoshouldifollow.com)
- 12 Ways to find brands and companies on Twitter**  
[toprankblog.com/2009/03/twitter-user-discovery/](http://toprankblog.com/2009/03/twitter-user-discovery/)
- WeFollow** [wefollow.com](http://wefollow.com)

- Twellow** [twellow.com](http://twellow.com)
- Twibs** [twibs.com](http://twibs.com)
- TweetLater** [twitter.com/tweetlater](http://twitter.com/tweetlater)
- Twittonary** [twittonary.com](http://twittonary.com)
- Sitemasher** [sitemasher.com](http://sitemasher.com)
- hashtags.org**
- 101 Twitter guidelines** [laurenroth.com](http://laurenroth.com)
- How not to build your Twitter network**  
[mashable.com/2008/11/17/twitter-community-donts/](http://mashable.com/2008/11/17/twitter-community-donts/)
- How to build community on Twitter**  
[mashable.com/2008/11/10/twitter-community/](http://mashable.com/2008/11/10/twitter-community/)
- Twitt(ur)ly** [twitturly.com](http://twitturly.com)
- Retweetist** [twitter.com/retweetist](http://twitter.com/retweetist)
- Tweetmeme** [tweetmeme.com](http://tweetmeme.com)
- Tweetlists** [twitter.com/tweet\\_lists](http://twitter.com/tweet_lists)
- TweetBeep** [tweetbeep.com](http://tweetbeep.com)



# Engage in the conversation

DAVID WORSFOLD

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David  
Worsfold's  
Twitter page

Ron Jones rightly talks about building relationships, and that really is the key to success on Twitter. People will not follow you, read your Tweets and click on your links unless you are adding value to their lives. Obviously, defining value in this context is difficult, as people are using Twitter for a huge variety of reasons, but in a business-to-business context it is easier to understand.

Are you providing useful insights and comments on the market(s) that your followers operate in? Do you point them to articles, videos and other content that is going to be useful to them in their business? Are you recommending other useful people for them to follow – this is usually done on a Friday and called “Follow Friday” or simply #FF. If you represent a brand, are you responding to praise and criticism of your brand on Twitter? Doing all of these things shows that you are willing to engage in the conversation on Twitter and build genuine relationships.

Many people are intimidated by the 140 word character limit as they feel it is impossible to say anything meaningful in so few words. The majority of tweets from the almost 1000 people that I follow contain links to other content, sometimes their own content in a blog or an article, but just as often someone else's content. By putting in links (using url shorteners) you can greatly enhance the value of a short comment.



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Chapter 4  
Engage in the  
conversation



## Putting in some personality

Ron Jones says in the section on setting up an account that you should add a personal element to your biography, and this goes a long way towards answering the frequent questions about how much personal content you should include on a Twitter account that is primarily for business. The answer is summed up in the old saying “All work and no play makes Jack a dull boy”. Accounts that are purely and rigidly about business can become rather dull. They may have a value as news source but you will find yourself putting them in a separate category, away from those you feel a real affinity with because you have some sense of them as a person.

I always liken Twitter to the cocktail party at the end of a busy day at a conference or exhibition. You will go round talking to people about what you heard during the day, who you met that was useful, the state of the market and your views on the issues that your business faces, but the conversation is unlikely to stop there. It is likely to drift from time-to-time to your views on the food, the sports results, what people are wearing, what the government is or isn't doing – the list is endless. That is how you should approach Twitter.

## Building and using lists

Once you have gathered a reasonable number of people to follow, you will need to start organising the content you receive, especially if you follow a mixture of people for business and other interests in the same account. This is where tools like *Tweetdeck* (mentioned earlier) come into their own.

The recently enhanced Twitter lists functionality is another tool you can use. You can create your own lists by category or follow other people's lists, which can also be used as another source of potential like-minded people to follow. You can also measure your own success on Twitter by the number of people who add you to their lists.



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## Twitter in UK financial services

Twitter has made a significant impact in the UK financial services sector, especially among independent financial advisers. Smaller, owner-led business perhaps feel more confident in taking the plunge in the rough and tumble that is Twitter, especially compared to some of the large financial institutions that are often very cautious in allowing employees access to social media.

There is a large community of IFAs on Twitter, sharing thoughts, views and information among themselves, but also engaging with current or potential customers. There is a lot of evidence starting to emerge that new customers can be found through social media – which includes other platforms such as *Facebook* and *LinkedIn*. Often, they will pick up recommendations from other people on the same platform, a very powerful tool according to some research.

Almost all the research agrees that customer retention is much higher when a relationship between the product or service provider and customer is struck up and maintained using social media. This is as true in financial services as elsewhere, as the two case studies that follow demonstrate.

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## What if Twitter disappears?

There is a fear among those hesitant of embracing Twitter that they might have to invest a lot of time and effort, only for it to disappear tomorrow. The rise and fall of *Friends Reunited* is often cited as an example of a social media fad that came and went.

The answer to that is simple: Twitter might evolve and thrive or it might not, but it will leave a huge legacy that the next generation of social media will build on. Whatever you invest in it and whatever you learn from it now will be useful in the future.



## About *IFA Life*

Just two years ago, *IFA Life* (the Social Networking site for IFAs and Financial Planners) suggested to its members that they should consider Twitter as a communications and marketing tool. Many in the industry were perplexed, questioning how something as apparently trivial as Twitter could possibly have a place in the financial planning profession.

But today, *IFA Life* can boast a thousand members who use Twitter, and the number is growing every day as more and more realise the potential offered. As a tool, Twitter is a key part of our own communications strategy – and I stress the word ‘communications’, because most IFAs associate Twitter with just marketing. We recommend using Twitter in a number of ways:

- **To listen. To listen to your clients, your market and what people say about you and your profession**
- **To improve your knowledge, to learn new skills and to share best practice**
- **For search engine optimisation and to attract website traffic**
- **Thought leadership**
- **Networking and relationships**
- **To collaborate with others on projects**
- **To comment on issues online and to share expertise**
- **To contribute to debates and to add value to people’s online experience**
- **Build brand loyalty and create buzz around your proposition**
- **Customer service and answer questions**
- **Promotion, marketing and sales**

- **To create source material as part of a smart phone app**
- **Build community around your brand**
- **Build reputation and enhance perception of credibility**
- **To find and promote events, conferences and seminars**

*IFA Life* also uses Twitter as a new medium for advertisers to extend their reach. In addition to traditional banner advertisements, we also offer brief posts as part of our Twitter stream. Providing the majority of *IFA Life*’s tweets add value, the occasional blatant advertisement for a provider/supplier will often receive multiple clicks if it includes a website address. Advertisers have reported very high click-through rates compared to traditional online media.

In short, Twitter is a powerful, multi-faceted communications tool. But for it to be truly effective in your business, you need to know why you are using it. In other words, you must have strategy behind it. Without strategy, your use of Twitter will be unstructured and any business benefits will be accidental at best.

Advisers should invest time in learning about Twitter, and the forthcoming Social Media in Financial Services conference will be a great opportunity: [ifalife.com/SocialMediaFS2](http://ifalife.com/SocialMediaFS2)





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## Case Study

*IFA Life* is the award-winning social networking site for IFAs and financial planners. Every day, IFAs use the website to network, share best practice, debate industry issues, get marketing advice, read industry news, find training events, read expert articles – and to provide help and support to one another.

With similar functionality to well-known networking websites such as LinkedIn, Ecademy, Facebook, Xing and others, *IFA Life* is unique in that it is dedicated to the needs of the financial advice profession.

Many IFAs now view the website as an essential business resource, with many visiting *IFA Life* as often as ten times a day.

In October 2010, *IFA Life* launched the first of three iPhone Apps and *IFA Life Jobs and Careers* – a specialist financial services jobs site which uses extensive use of social media to help people find and promote jobs.

*IFA Life's* founder is Philip Calvert – author of two books and a professional speaker on Social Media. [ifalife.com](http://ifalife.com)



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# Martin Bamford and *Informed Choice*

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Martin Bamford

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*Informed Choice*  
Twitter page

## Biography Martin Bamford

Martin is a Chartered Financial Planner and Certified Financial Planner (CFP) professional. He is managing director of *Informed Choice*, an award-winning firm of Chartered Financial Planners based in Surrey. *Informed Choice* works with individuals, trustees and business owners, providing fee-based independent financial advice to help them to build, manage and protect their wealth.

Martin is a prolific writer; in addition to writing two blogs (*ic-ifa.co.uk* and *brilliantwithmoney.co.uk*), he has written three published personal finance books. Martin's latest project is a business and personal development website for financial advisers – *brilliantwithadvice.co.uk*.

For the past two years, Martin has been chairman of the Surrey branch of the Institute of Financial Planning. He was named as one of the most influential financial advisers in Britain in a survey by *Professional Adviser* magazine in 2009.



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# About *Informed Choice*

## Case Study

*Informed Choice* managing director Martin Bamford (@martinbamford) started using Twitter in May 2008, a couple of years after the website was launched. Since then, he has posted over 3,500 tweets and has accumulated 1,960 followers. Martin uses Twitter for a variety of reasons, for both social and business networking online.

In the 2½ years since he started tweeting, Twitter has become an important part of Martin's online marketing strategy, enabling him to make new connections, share links to articles, get answers to questions and promote his business. He has acquired several new clients using Twitter and established professional relationships with a number of people he now considers to be strong advocates.

In addition to his personal account, which he uses for a mix of business and social tweeting, Martin established a company profile (@informedchoice) in July 2008. This is purely business focused and primarily shares links to blogs published on the company website. It is also used to interact with clients, professional connections, suppliers and journalists.

Last summer, to celebrate *Informed Choice's* 15th birthday, they held a Twitter competition, using Twitter to give away one free Financial Plan a day for 15 days. The competition helped to raise the profile of *Informed Choice* on Twitter and took their followers up from 120 to over 600 in a matter of weeks. It also secured two new clients, who liked what they saw and engaged with the company.

Today, *Informed Choice* gets around 40% of its new client enquiries each month from the Internet, including the use of Social Media such as Twitter.

Martin explains, "The internet is so well integrated now that many new clients are finding our website and getting in touch because of something they have seen on Twitter. Whilst they might not always make contact directly through Twitter, it is becoming increasingly common to discover they have found us because of our online social networking activity."

Martin explains that the 'secret' to using Twitter effectively is to be consistent.

"It is little use posting once and then ignoring Twitter for months. If you post daily, either from your PC or from a mobile internet device, you can quickly build followers and credibility, which lead to tangible results."

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on Twitter  

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Case study



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## Biography

### Ron Jones

Ron is President/CEO of *Symetri Internet Marketing*, which provides strategic SEM consulting and training. Ron is involved in the SEM community and speaks at conferences and seminars, as well as hosting regional SEM events where he provides participants SEM training and education best practices. Ron also serves on the Board of Directors for SEMPO and is also one of the authors for the SEMPO Institute Fundamentals and Advanced courses.



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## Biography

### David Worsfold

David has over 25 years experience as a financial journalist, mainly covering the insurance industry and is now Group Editorial Services Director at *Incisive Media*. He has wide experience of editorial management in large and small publishing companies, launching and re-launching publications, brand development through the launch of conferences, awards and websites. Over the last two years he has been pro-active in exploring how social media can link and build communities in the markets served by *Incisive Media*.



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