

# The Art & Science of Networking

Stand Out & Get Results in the AI Era

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# Get the Slides

[tinyurl.com/cfajan726](https://tinyurl.com/cfajan726)

**Don't let this be you**



# Take Charge of Your Career



Find that island of  
your dreams and...



Rocket to it!

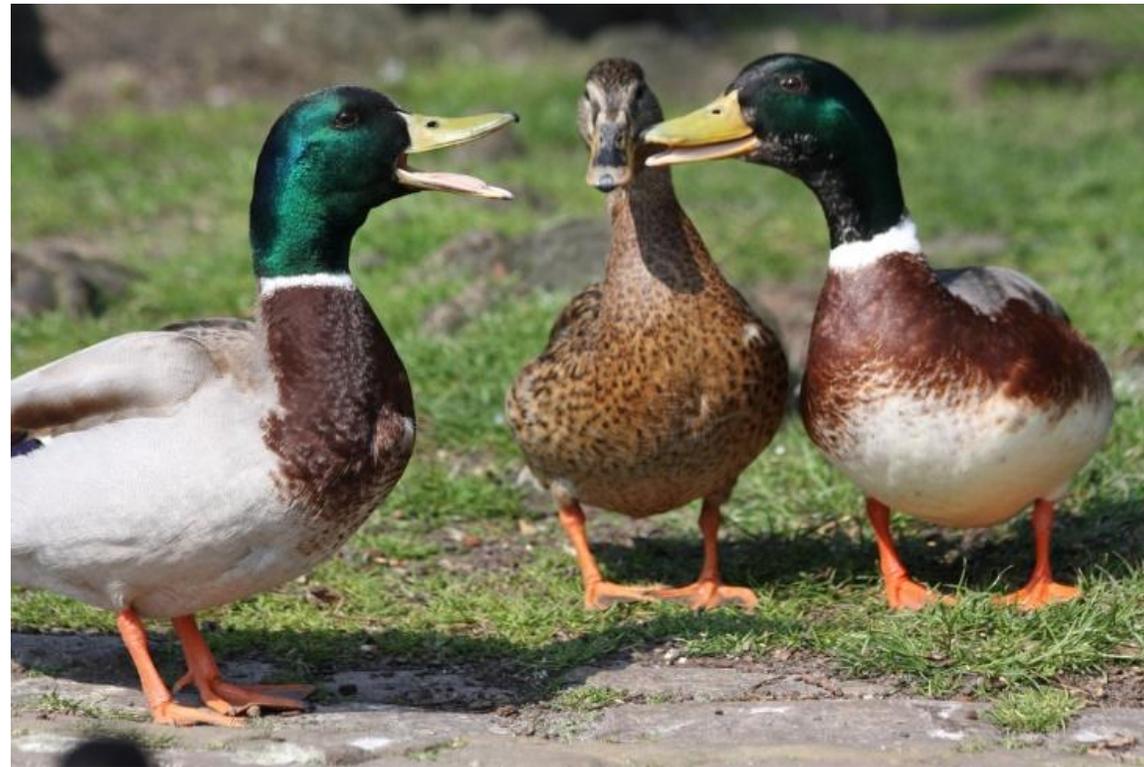
**Networking can  
turbocharge  
your career**

# WHAT WE'LL COVER

- ✓ Networking: What it is, and why bother
- ✓ Strategy for building your network
- ✓ How to reach out, including intro. to your pitch
- ✓ Easily keep in touch
- ✓ Conduct high-ROI informational meetings
- ✓ Create networking opportunities at events

# Networking

## Getting introductions and building relationships over time



# It's all about keeping In touch



- **Form lifelong relationships**
- **Re-contacting is key**

# Networking helps you...

Stand-out (lead) by bringing in new

- ❖ Techniques
- ❖ Strategies
- ❖ Partners
- ❖ Business intelligence



Learn about career options (that island...)

Tap into the hidden job market

**Build your  
Internal & External  
Network**

# Think broadly about your **INTERNAL** network

Your current boss, and their boss (or board members)

All your dotted-line bosses

Others above you that you know

Previous Managers

Current and previous colleagues

Those in ERGs you're involved with

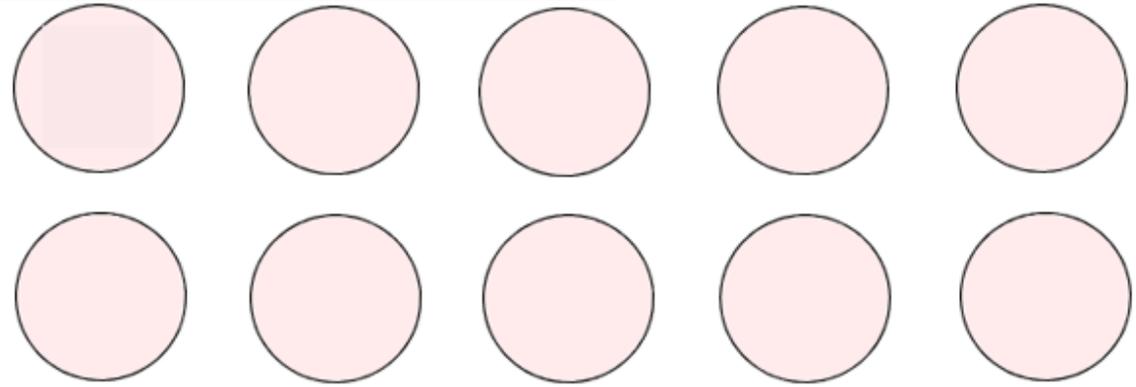
Acquaintances

Anyone else who you might be open to helping, and who might want to help you

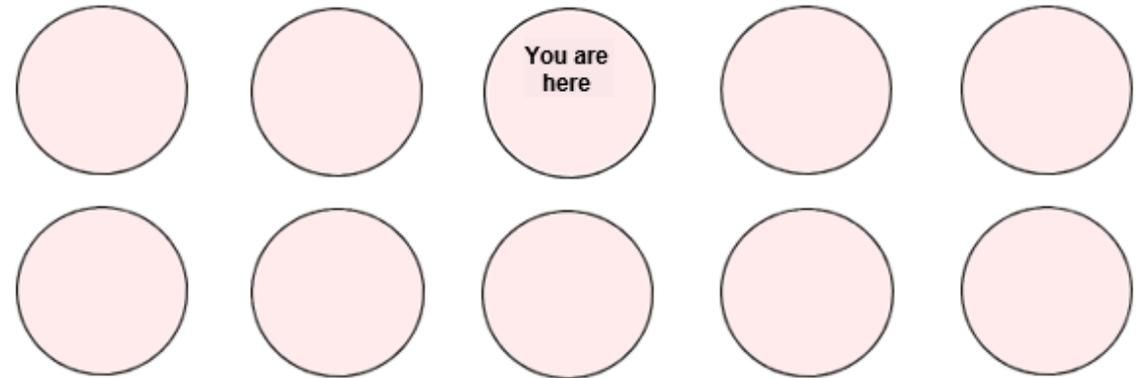


# At YourOrg, who depends on you, and who do you depend on?

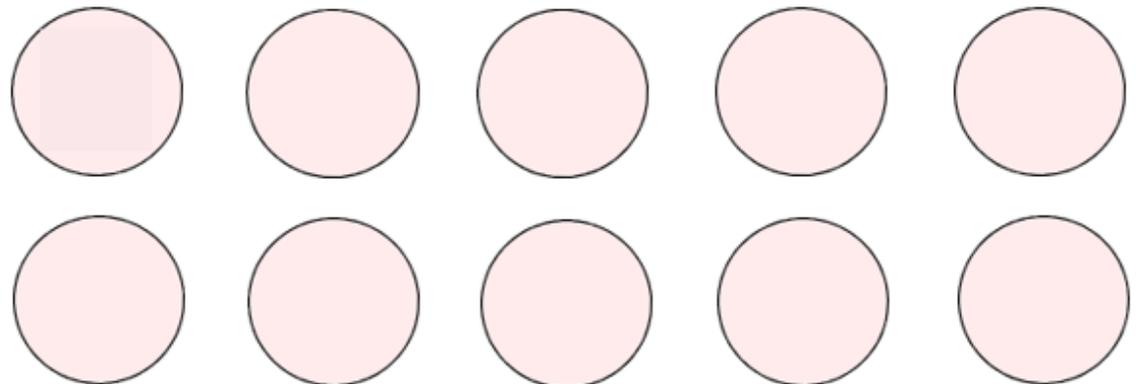
## Those above you who influence your job



## Peers – At Your Level



## Lower Level than You

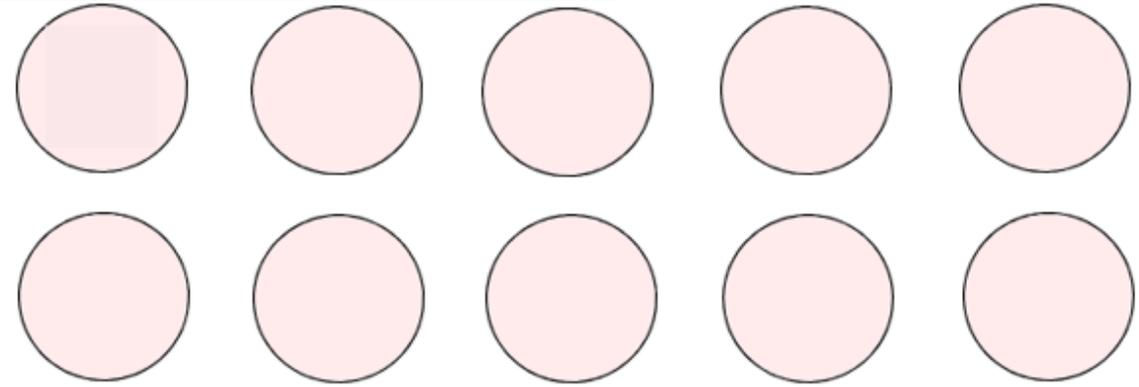


# Create Your “Stakeholder Map”

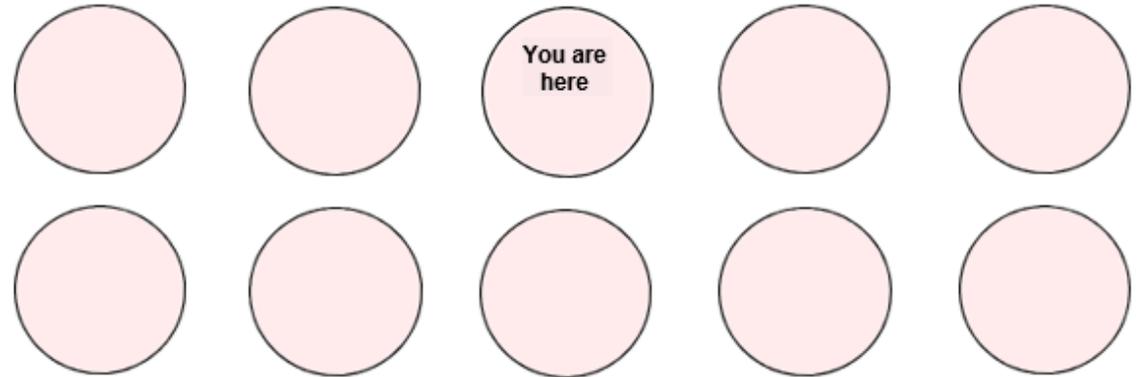
- List all your:
  - “bosses” (not just the official one)
  - peers (including business partners, vendors)
  - “subordinates” (including non-direct reports who support you)

**Quarterly: Assess these relationships, address gaps**

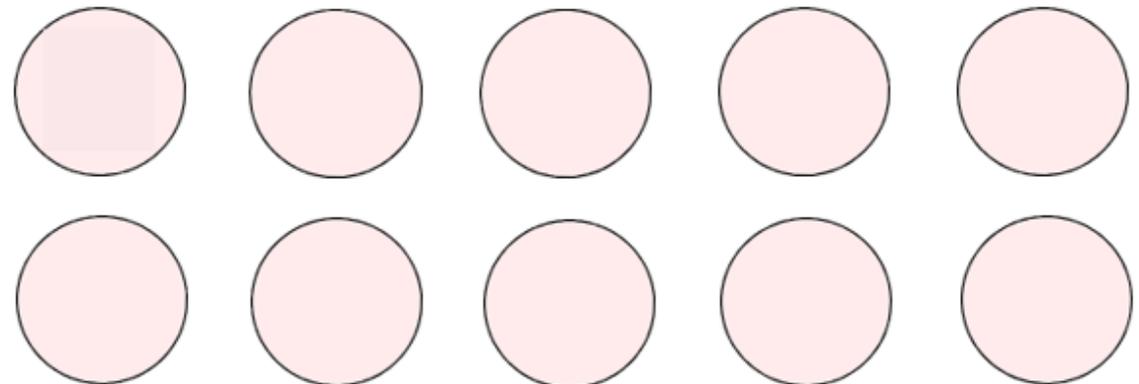
## Those above you who influence your job



## Peers – At Your Level



## Lower Level than You



# Think broadly about your **EXTERNAL** network

External colleagues, including people who used to work for you

Other professional contacts

- Vendors
- People you worked with years ago
- former professors

Family and close Friends

Acquaintances (e.g., your neighbor)

School classmates

Your dentist...

*(Google "Weak Ties")*



# Ways to Build Your Network

- Join an Employee Resource Group
- Associations – Professional (CFA Societies), Alumni, Civic organizations Seek to improve visibility via projects, assignments
- Look for opportunities to present to a broader audience, e.g., at conferences
- Volunteer to lead internal initiatives
- Leverage Referrals & Introductions
- Cold outreach
- LinkedIn (and other social media)



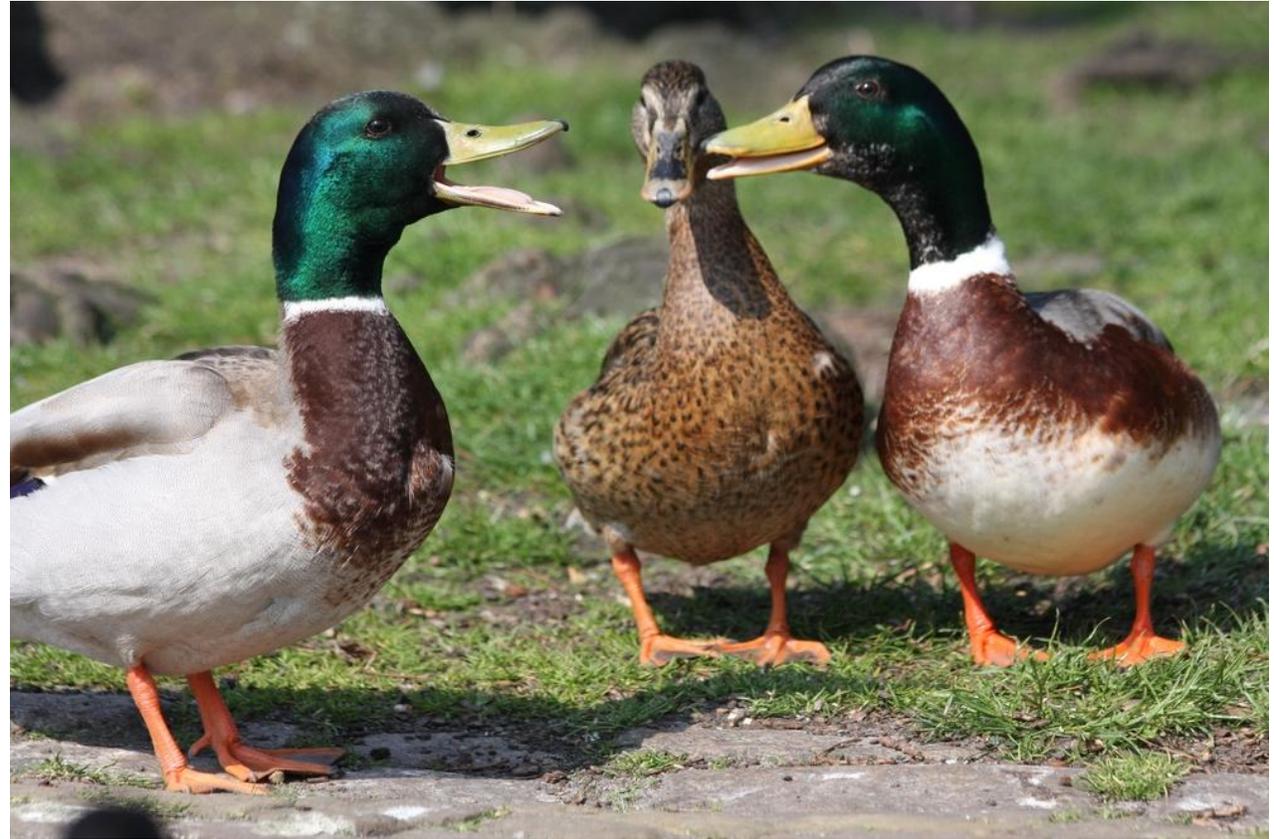
# LinkedIn: Who to Connect With

**First  
Quality...  
Then  
Quantity**



# Quality Connections

- ✓ **Know in some way & open to helping (maybe)**
- ✓ **Connection request from stranger & you want them in your network**



*An Intro "duck" tion*

# If someone you don't know

## Build a relationship – ask why they are reaching out

**Example message (after “accept”):** *Hi Margaret, I appreciate your request to connect (just accepted)! As I like to know everyone in my first degree network, I'm curious as to how you came across my profile and/or why you decided to reach out.*

# Expand Your Network via Advanced People Searches with a quality network

See who you can be introduced to:

- Retained search firms
- Those who can hire you (now or down the road)



# Build Your LinkedIn (and broader) Network Quickly: 200+ Connections

If new to LinkedIn:

- “People you may know”



# An Essential Networking Tool



# Get the Slides

[tinyurl.com/cfajan726](https://tinyurl.com/cfajan726)

# Your Pitch is for..

- Networking, interviews, informational meetings, sales meetings, surprise encounters
- Answers to “what brings you here” “tell me about yourself”
- Making a memorable impression that differentiates you



# Pitch Versions

At Work

Five Second

Voice message, or cold-call

20 Second

Networking, “encounters”

One minute

Interviews

Two Minute

# Organizing Your Pitch

1. Branding / Hook
2. How they should “categorize you”
3. What differentiates you
4. Examples to back it up
5. Underlying your success, a conclusion
6. Turn it back to them

20  
sec

5 seconds

**Networking  
(One Minute)**

**Interview  
(2 minutes)**

# To Develop Your Brand, ask...

- What makes me great at what I do?
- What value do I add?
- How do I stand out?
- What is the essence of the role I perform and the value it provides?



# When saying your pitch (one or two min) start with your brand/hook

- I've been effective as a finance leader because I've been able to take the investor perspective, I know how to speak the language of investors.
- I'm not just an Operations Executive, I'm also a Diplomat and an Engineer...
- I lead my team in turning uncertainty into opportunity (Insurance professional)
- I tell stories with data (Data Science Director)
- I'm an energy insider (Corporate Development professional - PE energy firms)
- Organizational Learning is a journey, and I provide the map (Learning & Development professional)
- My clients tell me I get their brands better than they themselves do (Ad agency executive)



# Steps 2 to 5: A subset of Resume Summary Section

## FINANCE DIRECTOR

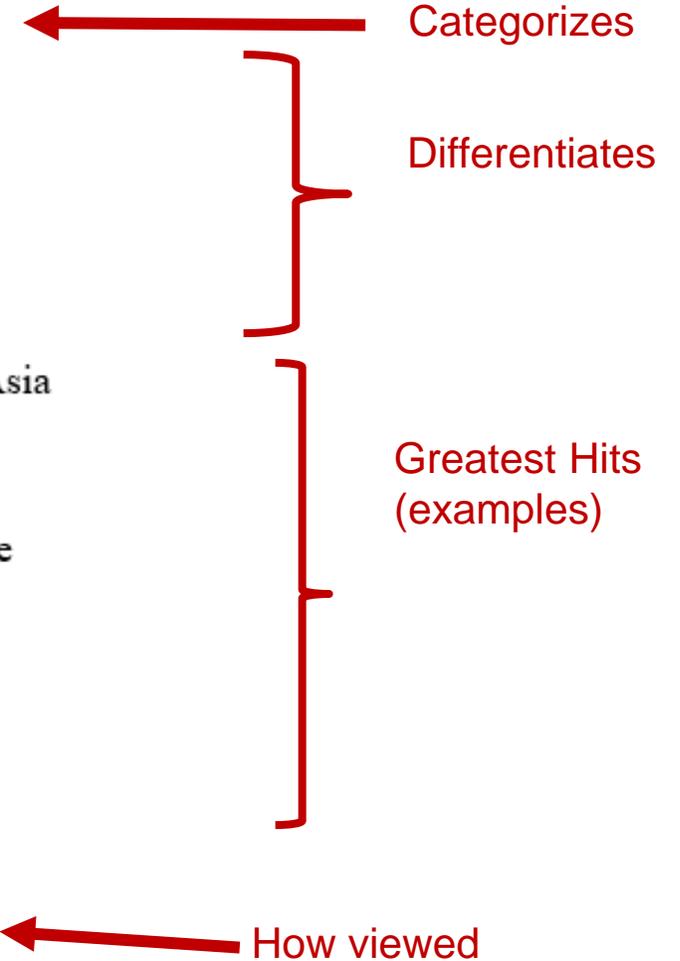
CFA Charterholder with 10+ years of progressively responsible experience in the media industry.

- Accounting
- Forecasting
- Financial Planning & Analysis
- Global Staff Leadership
- M&A
- Financial/Shareholder Reporting

◆ Viacom    ◆ NBC-Universal    ◆ McKinsey    ◆ HarperCollins

- **Global experience** leading teams across the U.S., UK, Canada, Australia, New Zealand, and Asia
- Key role in Viacom division restructuring, supporting **profit growth from -10% to +15%**. Received **award for outstanding performance**.
- Developed **global strategic plan**, as key member of 5-person leadership team reporting into the CFO of HarperCollins International Division (\$400 million in revenues).
- **Reduced costs by as much as 25%** while protecting or enhancing revenue sources.
- Key role in dozens of **Mergers and Acquisitions**; Expertise in all facets of M&A.
- **Managed staffs of up to 7**; saw near zero turnover of highly productive professionals.

*From LinkedIn Recommendations & Reviews: “Exceptional leader and team player...thought leader...delivers a top notch work product...Consistently demonstrates strong technical, analytical and presentation skills”*



# How to Reach Out



# How effective is this approach in getting you meetings that could lead to interviews?

Subject: My resume, to send to your contacts

Dear Katherine,

Thanks again for offering to send my resume to your connections who might be interested in speaking with me about portfolio manager opportunities. I've attached it.

Best,  
Rob

# Don't Make this Mistake!

- ✗ “send me your resume and I’ll forward it on” ***black hole***
- ✓ **you need to have the relationship with the hiring manager!**
  - Ask if ok to email with “Referred by” in the subject line. OR...
  - Send a “forward-friendly email” with your pitch



Source: [European Southern Observatory](#) under [Creative Commons](#)

Make it easy for them to help you

# Client sent email with “Referred by...” in the Subject. Led to an interview

Subject: Referred by Rosalind Franklin, re: BigCo

Dear Katherine,

Rosalind (copied on this email) suggested that I reach out to you because she knows of my underwriting background and interest in your work at BigCo. I’m currently a senior underwriting manager in the X department at OtherCo and am beginning to think about my longer-term career options.

From Rosalind’s description, the underwriting work you do sounds fascinating. I would greatly appreciate 20 minutes of your time to gain your perspective on my search and where I could be of help to you or others, now or down the road (I’m not expecting any openings).

This meeting could be mutually beneficial; given my success at reducing write-offs while maintaining revenues (I would be happy to share insights), I’m someone you may want to have on your radar. I may also be able to connect you with individuals in my extensive LinkedIn network for other hiring needs.

Additional background: In my current role, I focus on reducing underwriting risk for X. I’m also a CFA Charterholder and CPA with over 10 years of experience in risk assessment, asset allocation, and modeling, along with extensive client-facing experience. Highlights:

- Delivered over 300 client presentations, all well received; 3/4<sup>th</sup>s resulted in revenue-generating actions.
- Developed a risk assessment model that reduced write-offs by over 10% while maintaining revenues.
- Developed research reports for WellKnownClients A, B, C and more that included insurance and investment recommendations; all recommendations were adopted.

My LinkedIn Profile is [www.linkedin.com/in/myname](http://www.linkedin.com/in/myname) for your additional information.

I would be grateful for a few minutes of your time. Would you have 20 minutes available to talk?

## Elements of Success

- Focus on value to them
- Asked for just 20 minutes
- Powerful Pitch
- Not asking for a job
- No reference to a resume
- Call to action
- Show appreciation

Pitch

# Same pitch/content, only written as “forward friendly”

Subject: Introduction to Katherine Johnson, re: BigCo

Dear Rosalind,

Thanks for offering to forward my information to Katherine. As discussed, below I’ve shared my background and why I believe a meeting could be mutually beneficial.

I’m currently a senior underwriting manager in the X department at OtherCo and am beginning to think about other career options. BigCo is high on my list of target companies. Katherine, I would greatly appreciate 20 minutes of your time to gain your perspective on my search and where I could be of help to you or others, now or down the road (I’m not expecting any openings).

This meeting could be mutually beneficial; given my success at reducing writeoffs while maintaining revenues (I would be happy to share insights), I’m someone you may want to have on your radar. I may also be able to connect you with individuals in my extensive LinkedIn network for other hiring needs.

Pitch

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I would be grateful for a few minutes of your time. Would you have 20 minutes available to talk?

# Mass email to part of network, with recipients bcc'd

Subject: Your Help Requested

Hi all!

As some of you may know, I am beginning my search for a new portfolio manager position, after 10 years at BigCo. I would greatly appreciate the opportunity for a 15 minute conversation with a contact in any one of the financial institutions listed below. In that conversation I will not be asking your contact about specific openings. Rather, I would be interested in learning where I might be able to add value down the road.

A reminder of my background: I am a CFA Charterholder and Portfolio Manager with a 15+ year record of consistently outperforming industry benchmarks. My expertise includes fixed income, equities, options, and convertible arbitrage. Highlights from my experience include:

- Managed portfolios of over \$1 billion, achieving double-digit returns that were twice the peer average.
- Took underperforming portfolios at FinCo1 and FinCo2 and turned them into successful profit generators.
- Took positions that netted returns of over 140% in six months, through performing in depth research on distressed investments.
- Delivered expert market and portfolio commentary that was credited with attracting new investors by the CIO.

My LinkedIn profile is X.

I've listed 17 financial institutions below. I hope it's not too much to ask that you read through the list. Any contacts you have, in any position, in these or other financial institutions would really help. Please feel free to email me their contact information, and/or forward this email on as appropriate.

Thank you so much for your time, reflection and support!

**Financial Institutions....** (list)

One of my clients sent this email to roughly 100 people in her network, resulting in many leads, four interviews, and a job offer!

- a) Not asking for a job
- b) 15-minute conversation
- c) Specific target
- d) Pitch
- e) Call to action
- f) Example companies

*You can also send a version of this to one person*

# Cold outreach to explore/get advice on a future transition

Subject: Open to discussing Development/Fundraising at Ivy University?

Dear John,

Upon reading your bio on the Ivy website, I thought I would reach out to you, as I myself have experience that could support fundraising and development efforts.

I currently run a data analytics group at BigFinancial, and in the long run am looking to leverage this experience within higher education. I would greatly appreciate 20 minutes of your time to gain your insight on how my experience might be a fit in a University setting (I will not be expecting any openings). Given my many years of experience with Data Mining and DataMart design, perhaps I could also share with you some knowledge that you would find useful for Ivy's fundraising efforts.

Pitch

Some background: I have nearly 14 years in Database Marketing analytics, that is, turning raw data into actionable knowledge for Marketing or Sales teams. I believe that a University would find this experience valuable in helping to optimize fundraising contacts, target enrollment prospects efficiently, and improve retention. Highlights include:

- \* **Doubled Marketing's ROI to 23%** by adopting a "test-learn-enhance" approach to campaigns, and by developing segmentation/modeling strategies.
- \* **Increased retention by 57%** for high potential customers, and increased new account acquisition revenue by 79%, by developing segment-based targeting strategies.
- \* Led creation of entire **analytics infrastructure**, including development of databases with millions of records.
- \* **Modeled customer behavior**, creating segments that led to campaigns which generated \$ millions in revenue.

My LinkedIn profile is X.

I also notice from your bio that you made the transition from corporate to university that I'm looking to make. I would greatly value your insight regarding this transition I'm seeking. Would you be available for a brief meeting?

# Client obtained networking meeting to share insights and learnings

Subject: Discuss sustainable product launches at YourCo?

Dear Pudra,

I noticed on LinkedIn that you are the Chief Marketing Officer at YourCo. I thought I would reach out given our shared background in sustainable product marketing and the Coatings sector.

I'm currently Chief Commercial Officer at MyCo, responsible for a \$400MM P&L across Coatings, Rubber, Adhesive sectors. My LinkedIn profile is <https://www.linkedin.com/in/x/>.

I found that having conversations with business leaders in Coatings and Rubber sectors, like yourself, can be a mutually beneficial opportunity to share perspectives and market outlook, to the benefit of both of our organizations. Would you be open to a 20-minute conversation?

As part of our conversation, I would be happy to introduce you to people in my large and extensive LinkedIn network, as well as sharing any insights you would find useful in my experience in the Coatings and Rubber sectors.

Some background: I have 16 years of leadership experience, including sustainable product launches and strategic business development in specialty and renewable chemicals. My track record includes business transformations, restructurings and new market development leading to revenue/EBIT improvements at WellknownCo, MyCo and other employers:

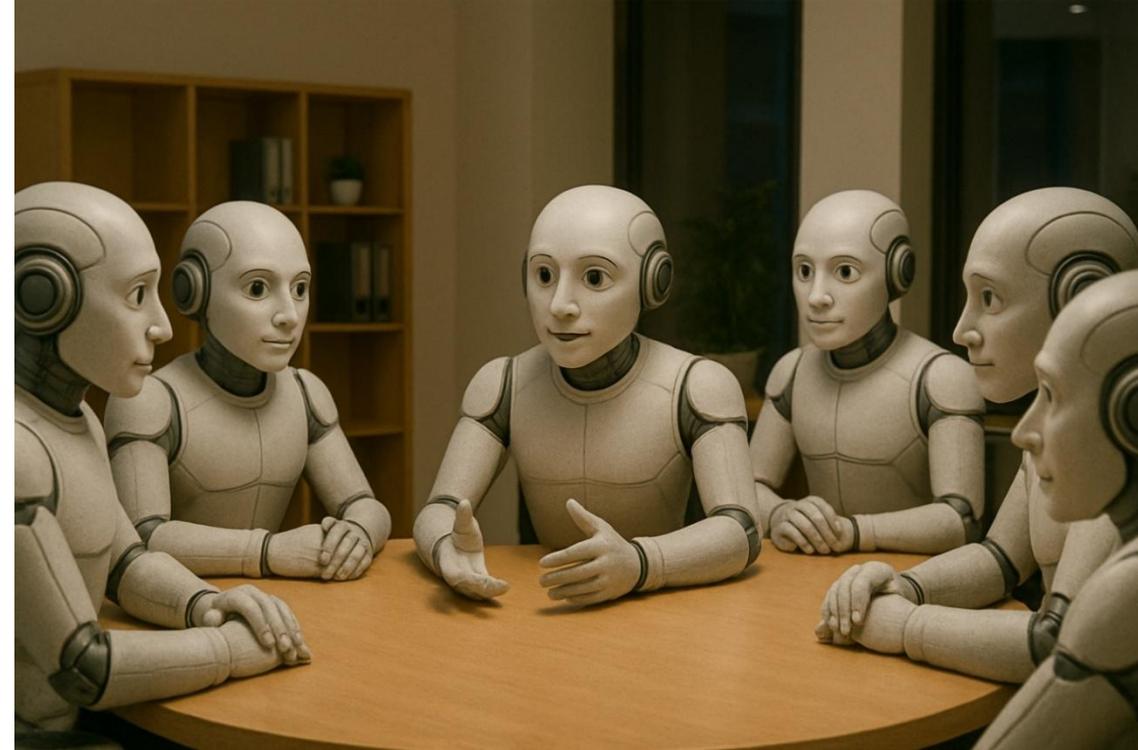
- **Managed five business lines** including sales, tech service, strategy, product management, new product development and manufacturing.
- **Turned around** two businesses with **transformative market-driven strategies** amidst Covid, Force Majeure, and severe global logistics challenges, achieving **double digit growth**.
- Shepherded four **disruptive products** to success; recognized in industry with prestigious **"Innovation Excellence" award**.
- Grew the sales of a **disruptive, sustainable product 30% via new product sales strategy** and sales excellence program.
- **Restructured and re-built team**; saw high retention of top performers. Increased engagement score by 30%.

Even a brief meeting would be beneficial. Would you have 20 minutes available to talk?

Pitch

# Use AI ChatBots to Improve Your Messaging

- ✓ These four ChatBots work well for career-related queries: ChatGPT, Claude, Gemini, Perplexity (others may as well)
- ✓ All are free to use, unless you use them “excessively,” than you’ll need to pay a modest monthly fee.



# AI Prompts to help you improve your pitch

- ✓ *“Provide a frequency count of the most common keywords and phrases...
  - ... across three job postings. Here’s posting number one:....”
  - ...associated with the X job title in the Y industry”*
  
- ✓ *“I have X years of experience as a CRO in the Y industry. I want to apply for a role as a GM or Head of a Business Division with full P&L responsibility. What transferable skills can I highlight? What gaps, if any, do I need to address? <optional: Here is the role I want to apply for>”*



# AI Prompts to help you improve your pitch (cont.)

- ✓ *I'm trying to obtain an informational meeting via a referral from a mutual connection, by sending an email to the person I want to meet with. Here is the subject line: "...." Here is the email message content: "...." Optimize the subject line and message content to improve the likelihood that I will get a positive response to my meeting request."*

**(NOTE: be careful with these kinds of rewrite requests – as they may make some aspects of your email better, and others worse!)**



# Structuring high-ROI Informational Meetings

1. Exchange pleasantries
2. Remind them why there
3. One minute networking pitch
4. Ask questions – see if/how you can help them
5. Depending on their interest in your working for them:
  - Ask who else you should talk with (optional: list of companies)
  - Maybe ask for feedback on your resume
6. thank them for their time.
7. follow up with a thank you note, next steps, or if they are interested, an “impact email”



Alt. Steps 4 and 5: ask them about their background, then start your conversation about sharing insights and learnings

**keeping in touch**

# Segment your contact frequency

**Not in your field?**  
2-3 times a year

**In your field?**  
Quarterly

**In a job search?**  
Keep “everyone”  
updated every 3-6  
weeks



# If you feel you have nothing to write...

[www.journalofstuff.com/usefularticle](http://www.journalofstuff.com/usefularticle)

**Subject:** Additional thoughts

**Subject:** Hello and update

Seasonal/holiday greetings

# Simple “Keeping in Touch” Email Example

Subject: Hello and update

Hi x,

Hope you and yours are well and that you had a good vacation. Thanks again for meeting with me last month. Since we spoke I’ve taken your advice on... <this is optional: something specific about your last conversation or their situation, if applicable>

I’m continuing to focus on both Treasury and Investor Relations leadership roles, and am having conversations that are moving forward. I’ve also been keeping my skills sharp through consulting with my prior employer, chairing a <WellKnownAssociation> committee, and taking investment and CFA-related courses.

If I can be of help to you, e.g., connecting you to people in my network, please don’t hesitate to let me know. Looking forward to keeping in touch.

# Contact Management: 50% of Success

Have a contact management system!

Inexpensive examples:

- Spreadsheet with columns for name, company, job target, **next action**, **date**, **next action**, **priority**, status notes – most clients do fine with just this
- Many other free or inexpensive CRMs - search for “free inexpensive contact management”; examples include Hubspot, Essentialpim (for Windows), Zoho, Nimble, Capsule CRM, etc.

# Keeping in Touch via LinkedIn

Share an article, photo, or update

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 Write an article  Image 

- View “Home” Page Updates
- Message your contacts

# Define Goals Before Networking Event

Build your network

Tell 5+ of the “right” people your value

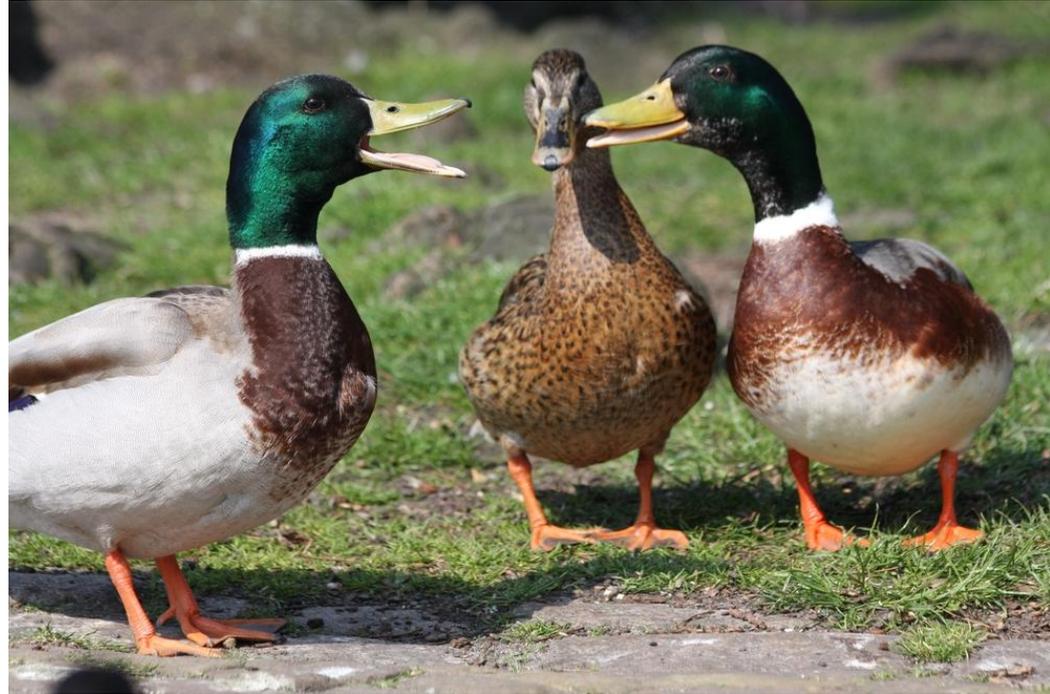
Learn needs of other organizations

Get feedback on your pitch and experience

Try to help at least one person you’ll meet

# At the Event

- Challenge: Talk to at least five people
- Speak AND Listen!
- Get email addresses
- Don't get captured (unless it's helping)



# At the Event

Present Yourself Well – eye contact, firm handshake, what you're wearing, etc.



# After the Event

- Email within 24 hours
- Follow up with a personalized LinkedIn connection request
- Keep in touch!



# Homework

1. Explore getting involved with at least one association
2. Share an article, insight or update on your LinkedIn feed
3. Create and assess your Stakeholder Map
4. Assess your true current network - goal: 200+
5. Get 200+ “quality” 1<sup>st</sup> degree connections on LinkedIn
6. Develop your “keep in touch” strategy incl. contact management
7. Develop your branding statement
8. Develop your Networking Pitch

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Q & A

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