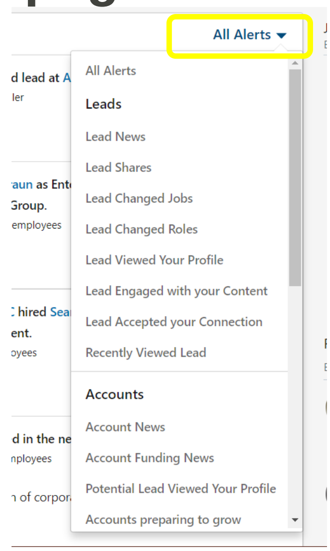
LAURA VIRILI

EDUCATING ADVISORS ON CLIENT ACQUISITION & RETENTION

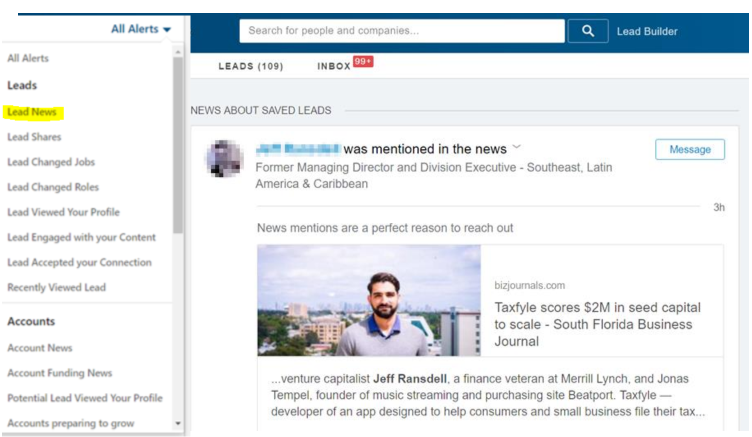
LinkedIn Sales Navigator – Homepage

Stay up-to-date on what’s happening with your leads and the accounts (companies) you’re focused on with Alerts. *Advisor best practice: review home page daily to discover outreach, surprise and delight opportunities, money-in-motion, etc.*



Alerts: Your homepage contains **all** the updates from your leads and accounts displayed in a news feed format. If you’d like to drill down on specific updates (e.g., job changes) use the the “All Alerts” drop down menu to select only the specific types of information you would like to review.

Note: LinkedIn uses the term ‘lead’ to define anyone that you want to stay up-to-date on, whether they are a client or not. In addition, LinkedIn uses the term account and company interchangeably.

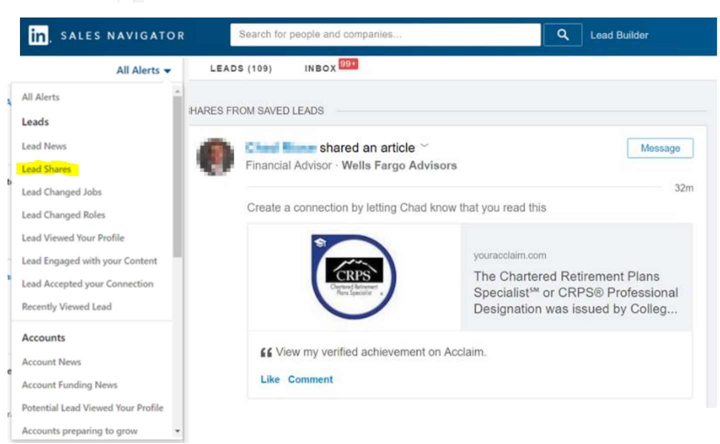


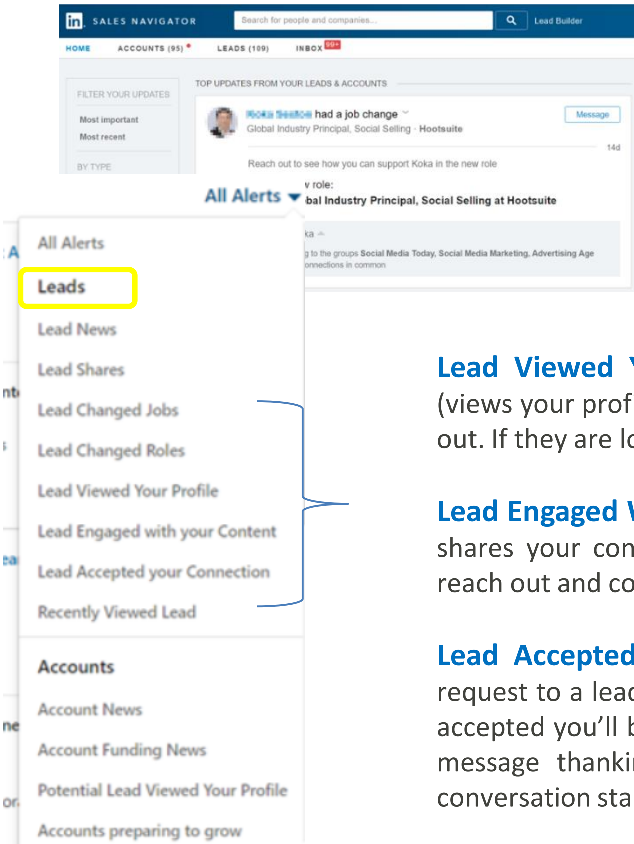
Lead News: Be the first one to know when one of your leads is mentioned in the news, changes roles/jobs, has a work anniversary or birthday *or* connects with someone in your network.

Best practice: pick up the phone and congratulate them or send them a personalized message!

Lead Shares: Gain unique insight by reviewing what your leads share on LinkedIn – these shares will range from causes they care about and interests they have to articles they have written.

Remember! Sales Navigator gives you access to this type of info for 2nd degree connections and beyond.





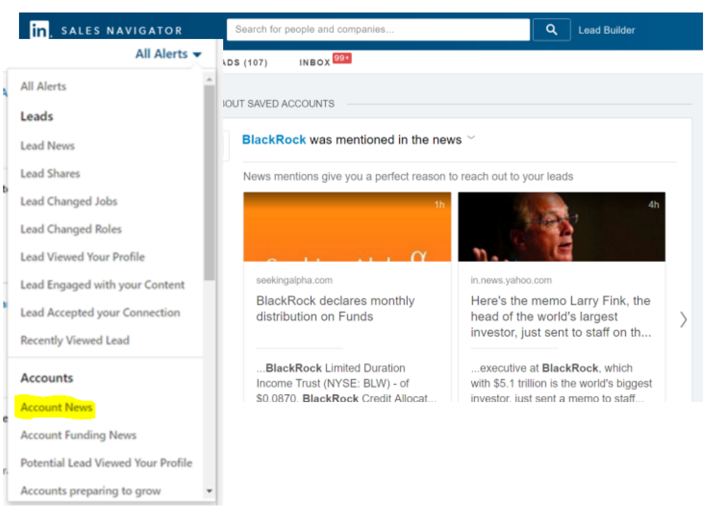
Lead Changed Jobs: Whenever a lead of yours changes jobs it will appear in this section. Money-in-motion opportunity!

Lead Changed Roles: Whenever a lead of yours changes their role within an account (company) it will appear in this section. Outreach opportunity!

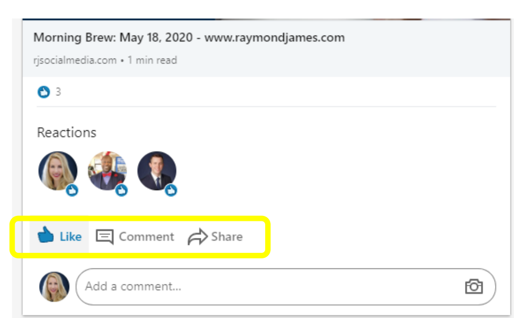
Lead Viewed Your Profile: If a lead of yours checks you out (views your profile) you will be alerted! This is a great time to reach out. If they are looking at you they are probably thinking about you!

Lead Engaged With Your Content: If a lead of likes, comments or shares your content you will be alerted! Another opportunity to reach out and connect, deepen the relationship or start a new.

Lead Accepted Your Connection: If you've sent a connection request to a lead that is a 2nd or 3rd degree connection and they've accepted you'll be alerted. Best practice: send them a personalized message thanking them for accepting your invite. It's a great conversation starter.



Account News: Any news (the good or the bad) from multiple news sources about accounts (companies) will be shared in this section. This is an exclusive feature of Sales Navigator. This is a very good way to nest within a company to know exactly what is happening and react with your leads accordingly.



Daily Best Practice: Every morning, login to Sales Nav and review your lead alerts. React to what they are sharing by using; **Like, Comment or Share**, or send a private message. Based on your firm's approved compliance guidelines, of course.