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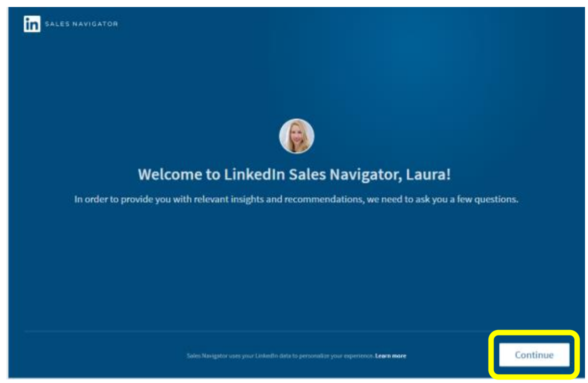
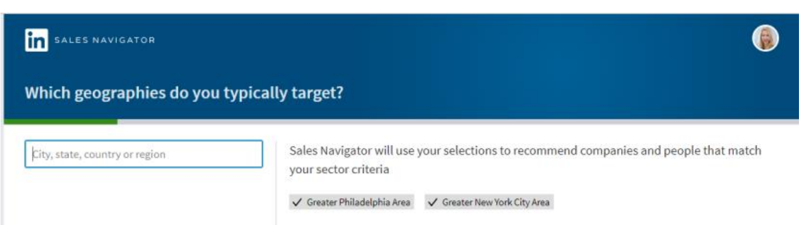
Educating Advisors on Client Acquisition & Retention

LinkedIn Sales Navigator – Set Up

LinkedIn Sales Navigator provides an onboarding process. It is recommended that you go through it because the more info you share about your prospects, territory, etc. the more relevant the recommendations and insights become.

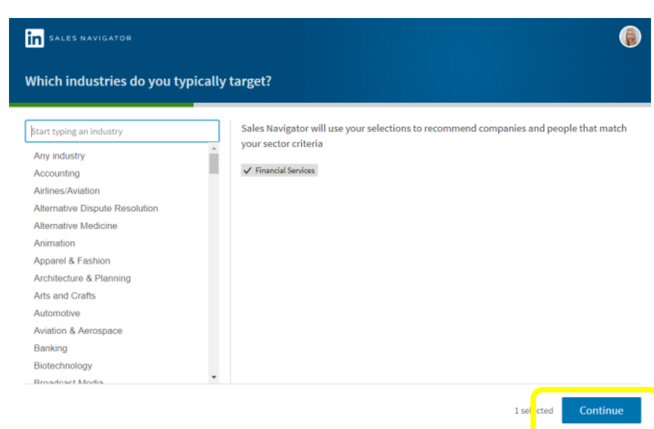
Sales Navigator Set Up Upon login you will land on a welcome page with your profile pic to ensure you are in the correct account.

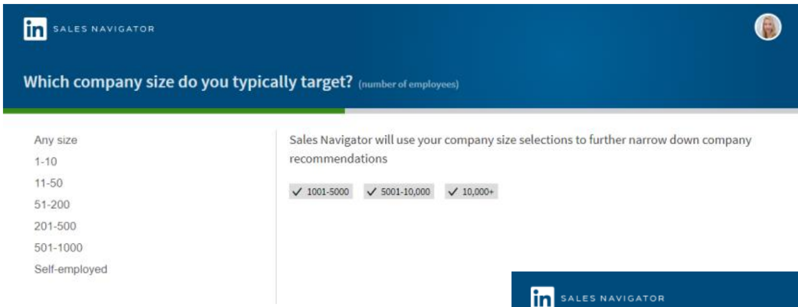




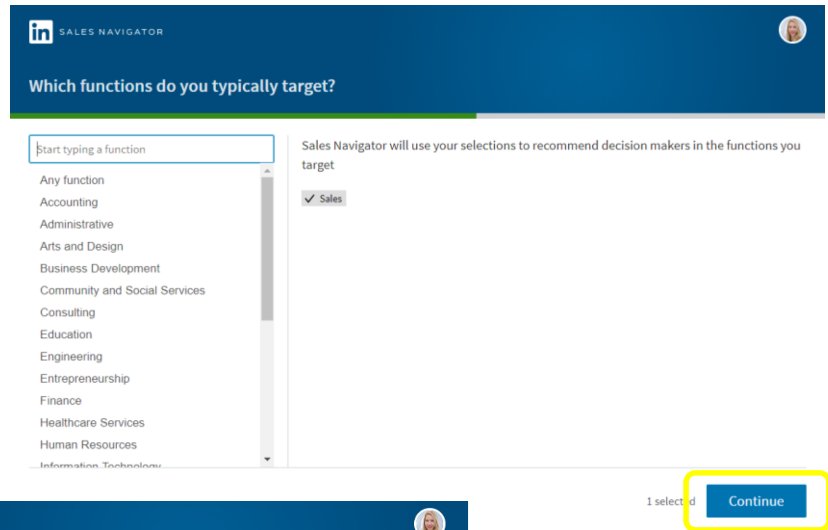
Territory LinkedIn will want to know about your sales territory. Enter the cities, states or countries of your territory. When you see the location you'd like click on the plus icon to add it. When finished click 'Continue'.

Industries Narrow down the industries that you most often sell to. You don't want leads for all industries. Scroll through the list and when presented with your niche click on it to add – there are over 100 industries! When finished click 'Continue'.

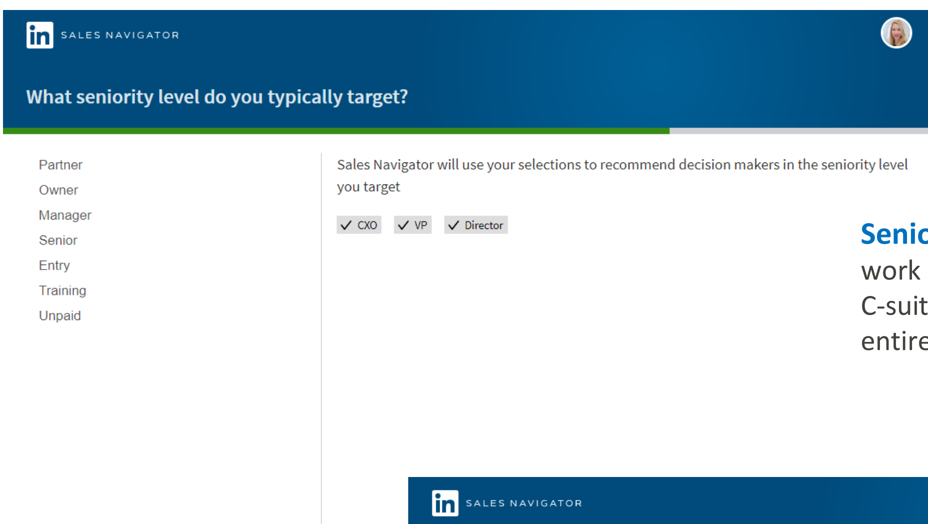




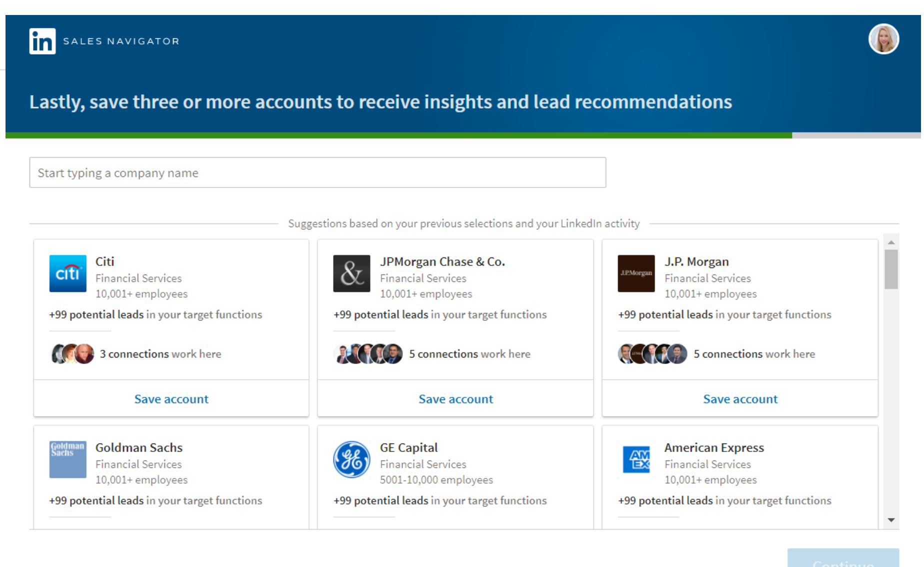
Company Size This is according to the number of employees. Select the appropriate company size(s) you typically target. When finished click 'Continue'.



Functions refer to the part of the business where your target prospect 'sits'. Be mindful of where the decision maker sits. Select as many as applies to you and your prospecting efforts. When finished click 'Continue'.



Seniority Level select the level you work with. CXO represents the entire C-suite (the X covers off on the entire C-suite). Click 'Continue'.



Accounts as a final step, you many add accounts (companies) that you would like to receive updates on. If you have clients and/or prospects at certain companies be sure to follow them. Click 'Continue' and your done!