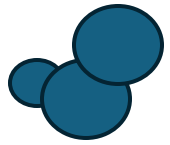


# LinkedIn Fundamentals: Build Confidence, Connections, and Clients for Your B2B Business



&

THE  
GREATLY  
AGENCY



# About Me

- Pre- 1999 offline
  - marketing and advertising focus
- 1999
  - shifted to greater focus online
  - Start-ups, family run companies, corporations
- MBA, Northeastern

VP-

The Greatly Agency | Greatly Digital Studio

- Strategy, Execution, Training
- Design, Marketing, Operations
- Products, services, for-profit, non-profit
- SCORE mentor since 2017
  - Chapter co-chair
  - Workshop Co-chair



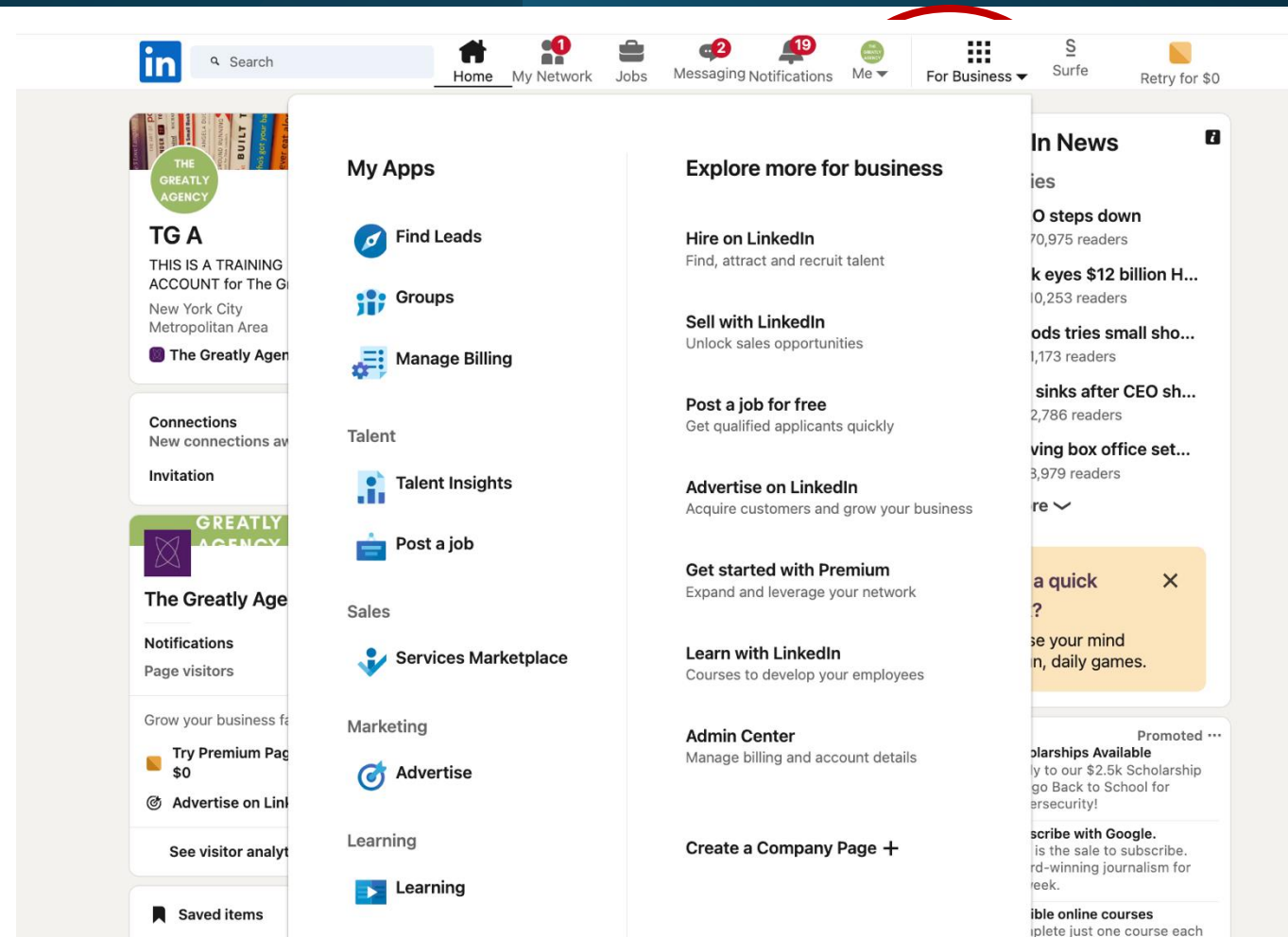
# The WHAT

What does LinkedIn Offer



# LinkedIn Services Overview

- Organic
  - Individual and Business Pages
  - Premium
- Paid
  - Ads
  - Marketing Solutions
  - Sales Tools
    - Premium
    - Recruiter
    - Sales Navigator



# AD SAMPLES

The image shows a screenshot of the LinkedIn Messaging interface. At the top, there is a navigation bar with icons for Home, My Network, Jobs, Messaging, Notifications, Me, For Business, Surfe, and Sales Nav. Below this is a search bar for messages and tabs for Focused, Unread, Drafts, My Connections, InMail, and Starred. The main area is split into a message list on the left and a conversation thread in the center. A red circle highlights a sponsored message in the list from Philip Perron at the University of... with the text "Sponsored University of...". Another red circle highlights an advertisement in the right-hand sidebar for Upwork, featuring a profile picture of a woman and the text "Five-star creative experts. Upwork, your one-stop shop for hiring great people" with a "Post for free" button.

**Message List (Left):**

- 2:15 PM: You: Excellent! Let me know when yo...
- 9:31 AM: **Philip Perr...** Sponsored University of... (1)
- 8:08 AM: You: Hi / We want to send you...
- Nov 19: I will have to join remotely 😞
- Nov 13: **Nicole Schn...** Sponsored Advance your... (1)
- Nov 5: **Lisa Williams** Sponsored We wanted to get in... (1)

**Conversation Thread (Center):**

Customer Education Program Manager  
you send me the best mailing address for you? The last I had was

1:41 PM: Hi Anne, that's so nice, thank you! Yes, same address.

2:15 PM: **Anne Driscoll** (She/Her) Excellent! Let me know when you are around and we can grab a coffee to catch up- maybe at Muddy Waters in New London week after next?

[Add contact](#) [Add lead](#)


**More inboxes (Right):**

- 8
- 1
- The Greatly Agency/gro...
- Sales Navigator inbox ↗

[Show all inboxes →](#)

**Advertisement (Right):**

Five-star creative experts. Ad ...

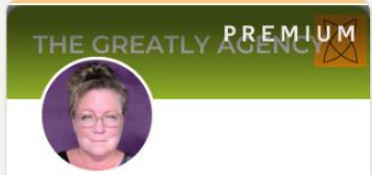


Upwork, your one-stop shop for hiring great people

[Post for free](#)



Search



**Anne Driscoll**

The Greatly Agency and Greatly Digital Media/...  
United States

The Greatly Agency

Profile viewers 17

Post impressions 17

Go to Sales Navigator

My pages (8) See all

Reading2Connect® ...  
Notifications 15

The Greatly Agency/...  
Notifications 4

eCommerce Profess...  
Notifications 5

Kalen Buchanio and 23 other connections follow Notion



**Notion**

656,377 followers  
Promoted

Companies like yours get up to \$6,000 of Free Notion w/ Unlimited AI. Manage your team, projects, and knowledge ...more



**Notion**

**Have you heard?  
Apply to get up to  
\$6,000 of free  
Notion with  
unlimited AI.**

[Apply now](#)



Get up to 6 months of Notion for free

150 submits

[Sign Up](#)

181

1 comment · 2 reposts

Promoted ...

**(un)Common Logic**  
Grow your business with insights from (un)Common Logic  
Anne, keep up with top digital marketing trends

Carlo Alberto also follows

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- Privacy & Terms
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- Business Services
- Get the LinkedIn app More

LinkedIn Corporation © 2024

AD SAMPLES

Today is not ads, it is paid tools for networking 1-1

# PREP- Before You Start PAID

## 1) Know you target market

- Not “anyone who will buy my products”
- This helps you focus and prioritize efforts/budget

### Examples:

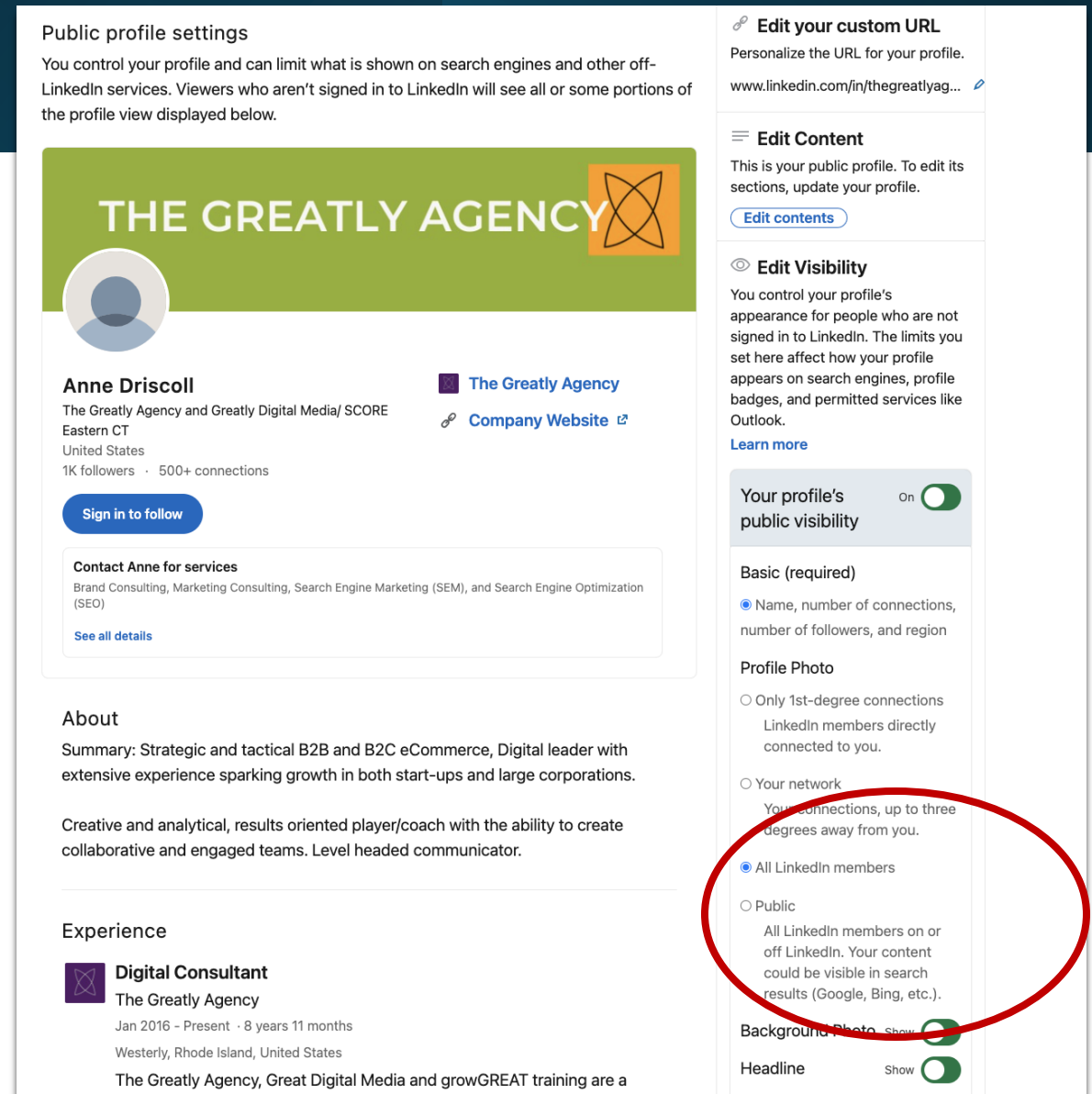
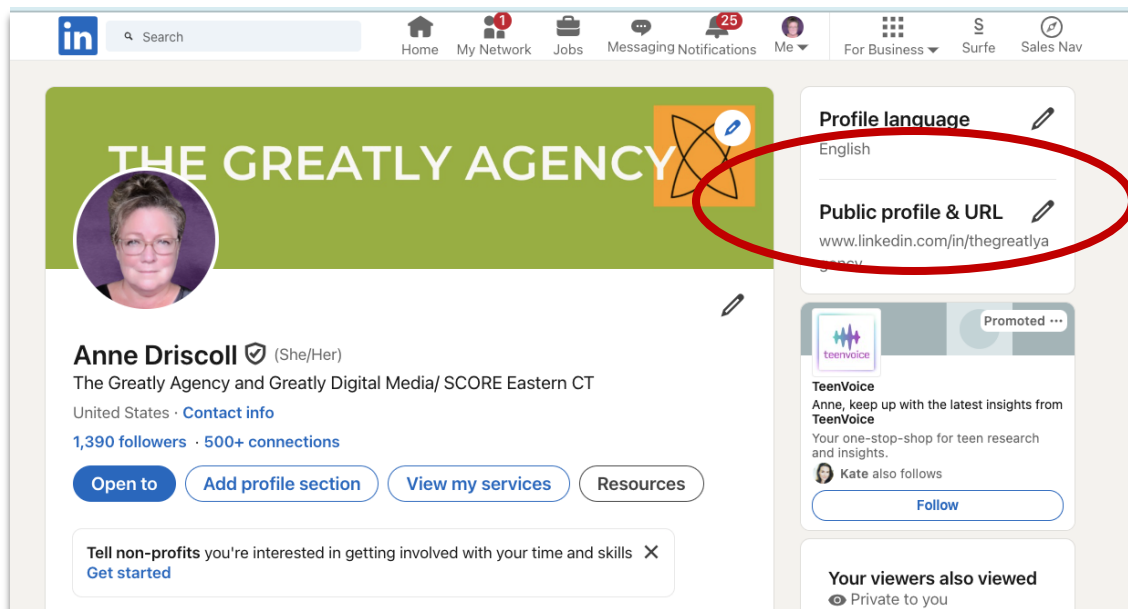
- Individual
  - Job title?
  - Geographic location?
- Account level:
  - Number of Employees?
  - Revenue?



# PREP- Before we begin

## 2. Have or Create a LinkedIn Profile

- Establish some connections
- Set to PUBLIC



# The WHY

PAID & Sales  
Navigator

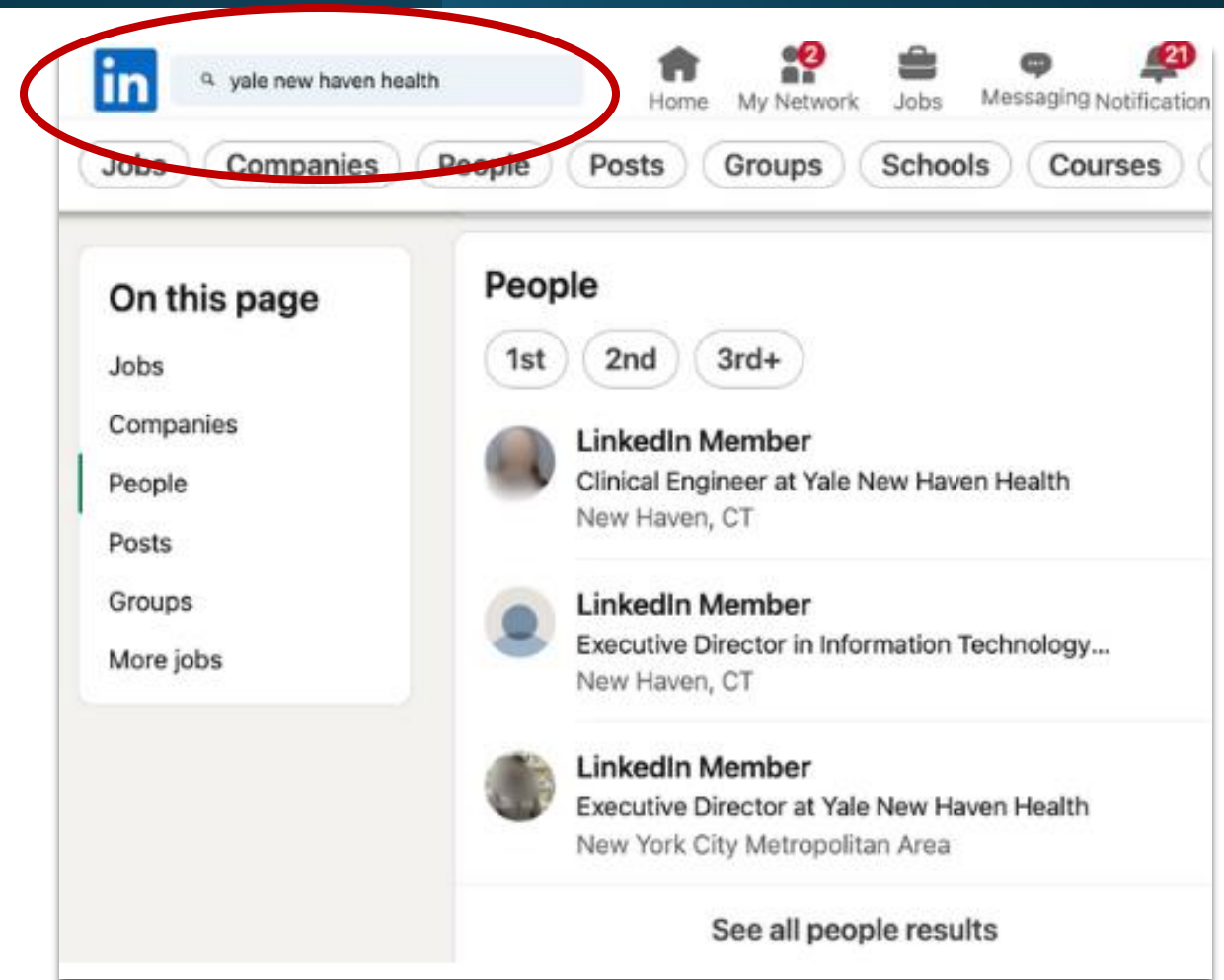


# For Those looking For Next Level Networking

- Access to advanced search filters for precise business prospect targeting
- Tools to discover and engage with potential prospects
- Real time insights on leads (commenting, sharing, work promotions)
- CRM (Customer Relationship Management) tools

# Many Levels to Next Level Networking

- Add as a **PART** of your sales networking/Sales process
  - If you meet someone at a conference immediately connect on LinkedIn, Free/Organic connection practice might be enough
  - Meet potential clients – immediately connect on LinkedIn to your personal profile



# Many Levels to Next Level Networking

## Consider Sales Navigator...

- **IF** you have capacity for access to large volumes of prospects
- Have the time to reach out and nurture those relationships

The screenshot displays the LinkedIn Sales Navigator interface. At the top, there are navigation tabs for 'Home', 'Accounts', and 'Leads'. Below this, the 'Lead' and 'Account' tabs are visible. The main content area is divided into several sections, each with a list of filters and a plus sign to expand them:

- Company:** Past company, Company type, Company headquarters location.
- Role:** Function, Current job title, Seniority level, Past job title, Years in current company, Years in current position.
- Personal:** Geography, Industry, First name, Last name.
- Workflow:** Persona (with a 'New' badge), Account lists, Lead lists, People in CRM.

On the right side, a separate panel shows a detailed view of the 'Lead' and 'Account' tabs, with a red arrow pointing to the 'Viewed your profile recently' filter. This panel also lists filters for 'Company' (Current company, Company headcount, Past company, Company type, Company headquarters location) and 'Role' (Function, Current job title, Seniority level, Past job title, Years in current company, Years in current position).



# Advanced Next Level Networking

## Bear in Mind:

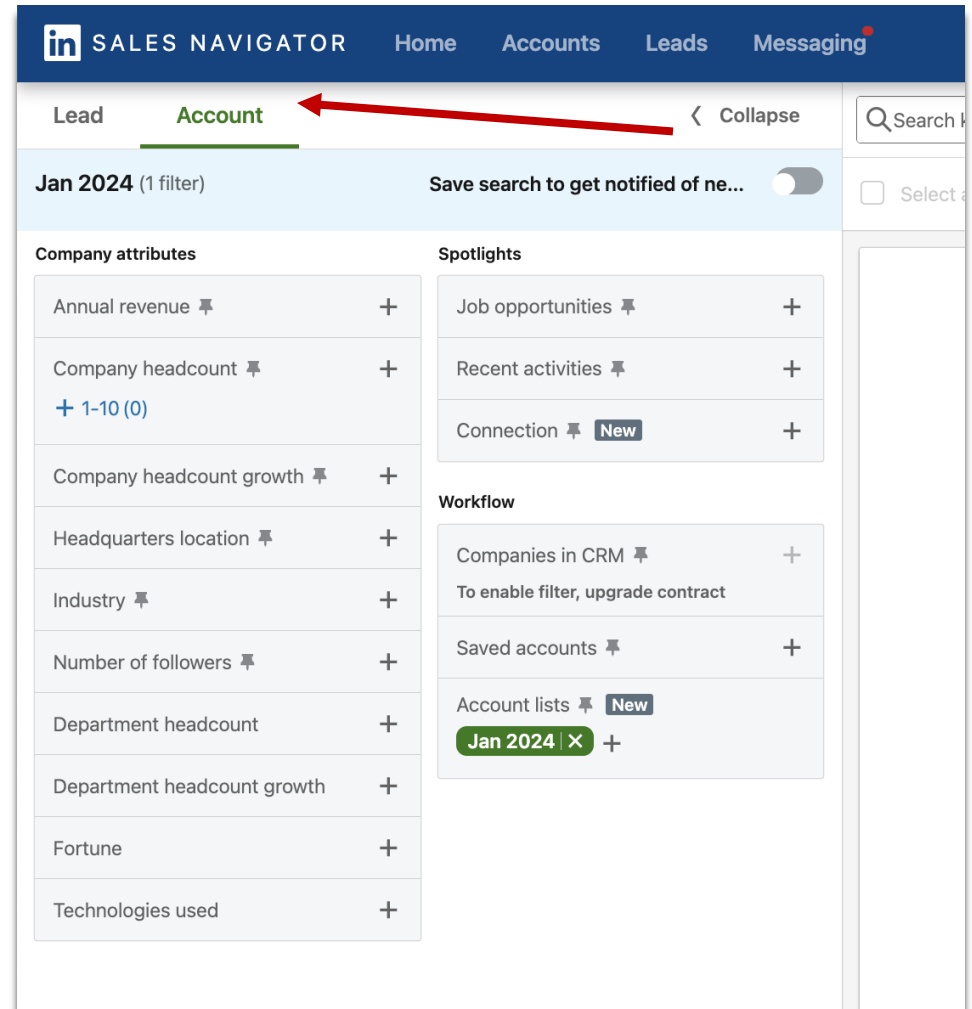
- Size of your ORGANIC (free LinkedIn personal profile) networks HELP
  - They create 2<sup>nd</sup>, 3<sup>rd</sup> connections
    - Sales Navigator only allows you to unlock 25 per month 3+ out of network names
  - Personal network connections create exponential accessibility

The screenshot displays the LinkedIn Sales Navigator interface with two panels: 'Lead' and 'Account'. The 'Lead' panel includes filters for 'Past company', 'Company type', 'Company headquarters location', 'Role' (Function, Current job title, Seniority level, Past job title, Years in current company, Years in current position), and 'Personal' (Geography, Industry, First name, Last name). The 'Account' panel includes filters for 'Company' (Current company, Company headcount, Past company, Company type, Company headquarters location), 'Role' (Function, Current job title, Seniority level, Past job title, Years in current company, Years in current position), and 'Personal' (Geography). A red arrow points to the 'Viewed your profile recently' filter in the 'Lead' panel.



# Advanced NEXT Level Networking

- Offers **account level search**
  - Large organization with multiple potential prospects and decision makers
  - Organized way to track potential prospects
  - Stay updated on target companies



# This might not be for everyone...

## Organic connections may be enough

- Navigator costs more, larger prospect tool
- Better organization tracking and integrations
- For Larger Volume

## Have to weigh the cost versus the benefit

- Starts CORE at \$79. Relationship mapping, teams, tracking, CRM



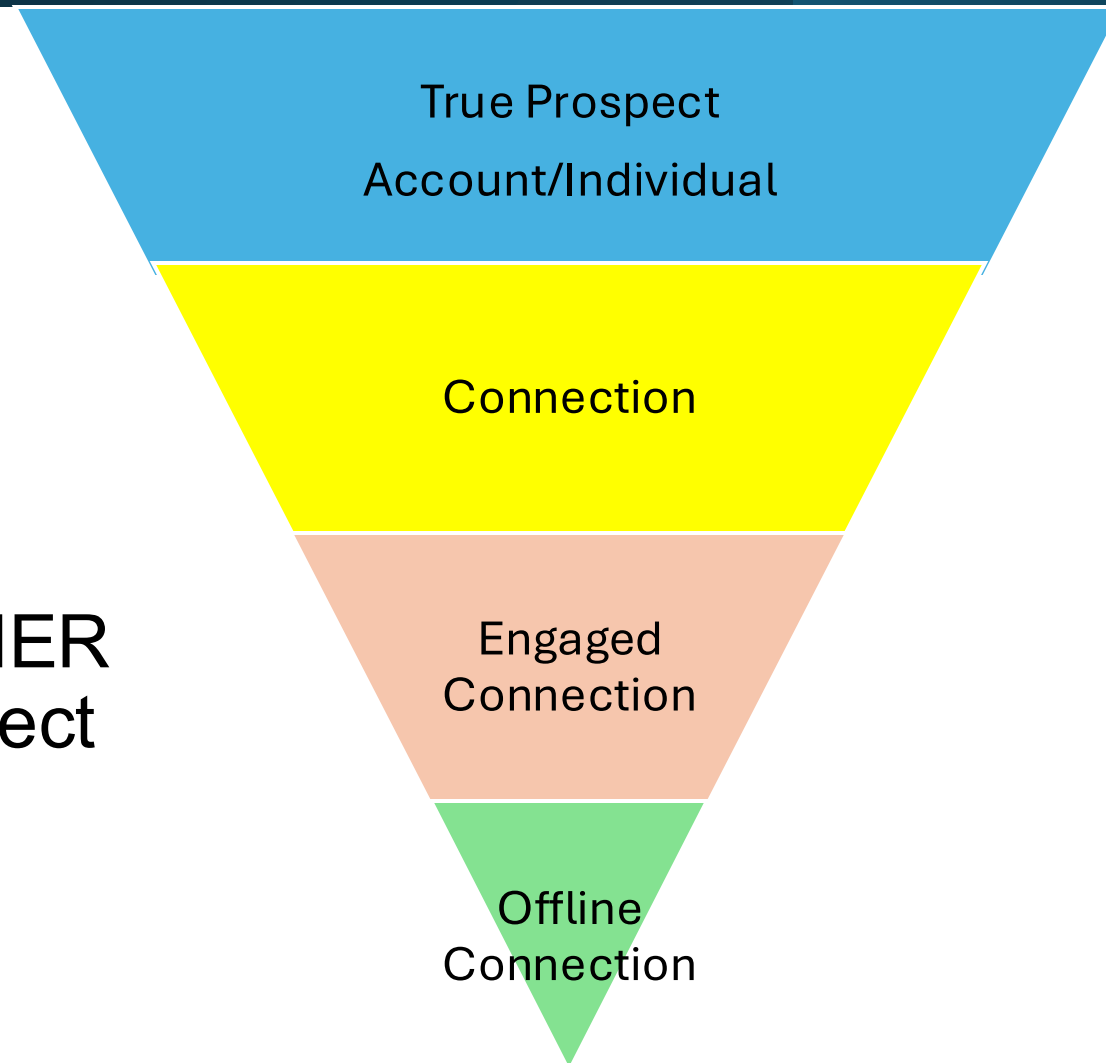
# The HOW



# High Level Sales Prospecting Review

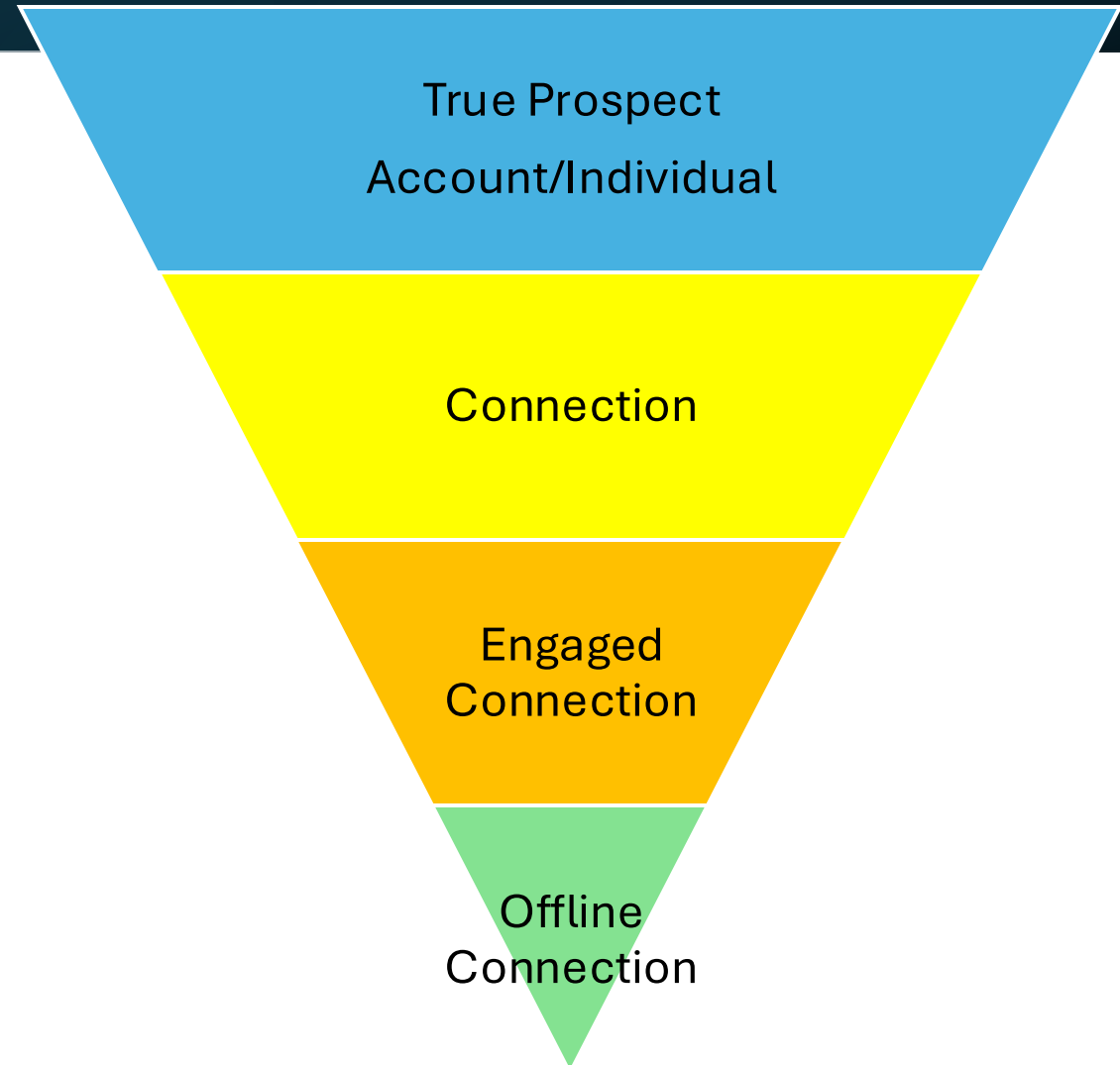
- Connect
- Nurture
- Convert

Can be used for EITHER  
referral sources or direct  
potential clients



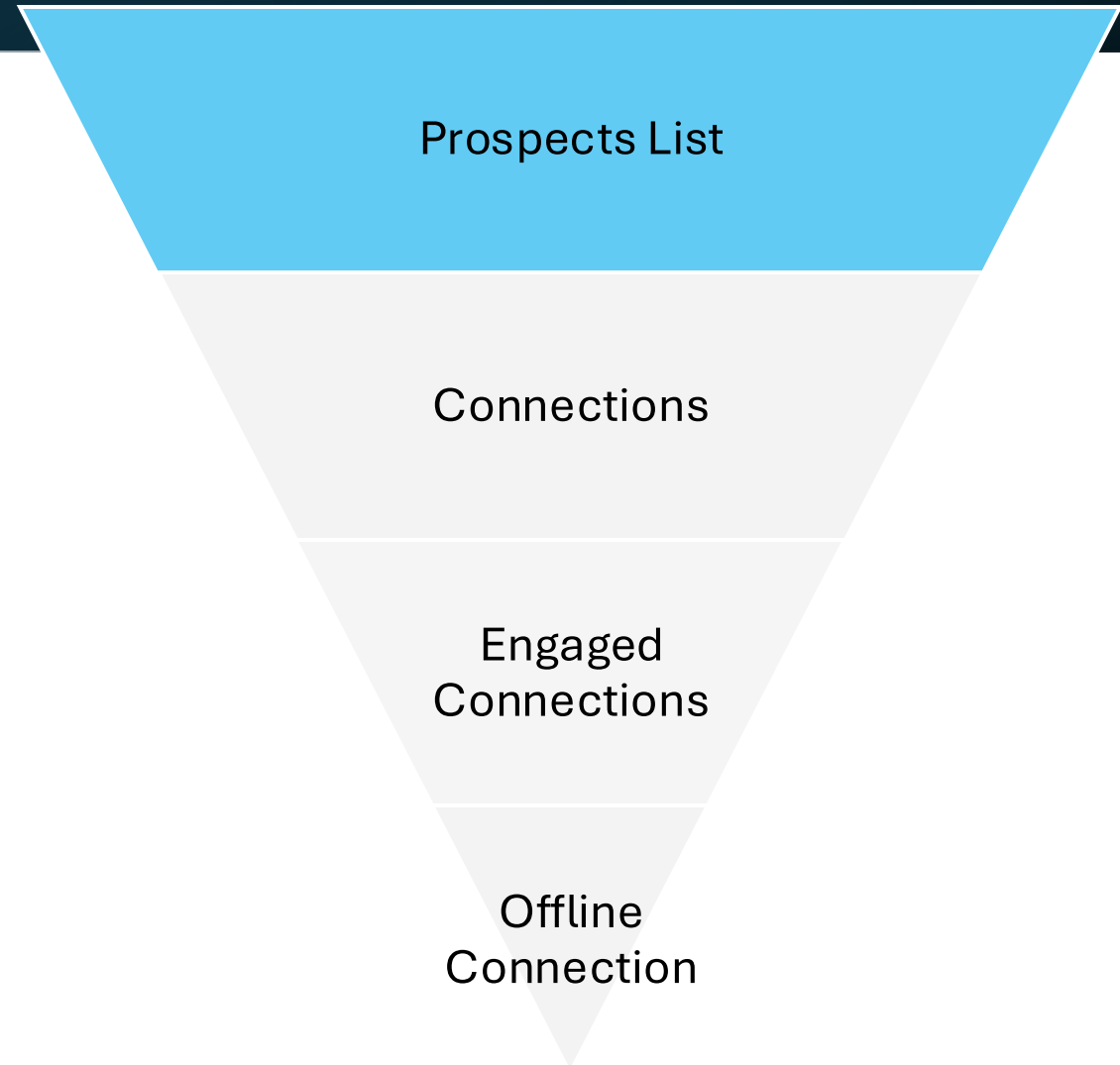
# CONNECT: Lead and Accounts

- Leads versus Accounts
  - LEADS: Individual People
    - Previous connections:
      - ex. email, work
    - Conference lists/Contacts
    - True Referral or Client Prospects
  - ACCOUNTS: Organization Level
    - Potentially multiple connections and decision makers



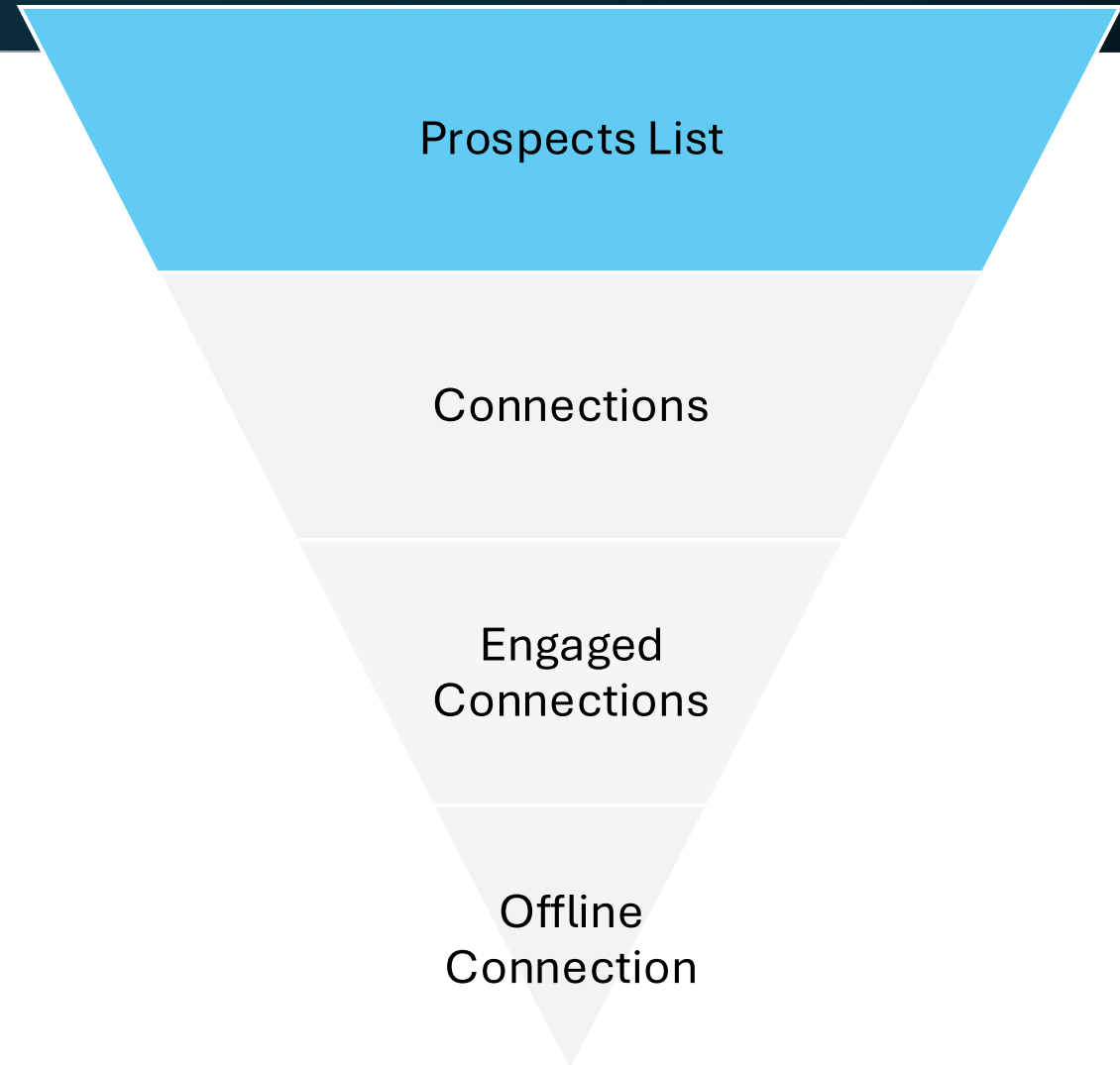
# Filtering for Prospects

- Both use Filtering
- Filter samples
  - Geography
  - LEAD: Job Titles
  - LEAD: Job level
  - 2<sup>nd</sup> or 3<sup>rd</sup> degree
    - “We know some people in common”
  - More
    - Don’t have to use all of them.
    - Include or exclude Just use a few and get a feel



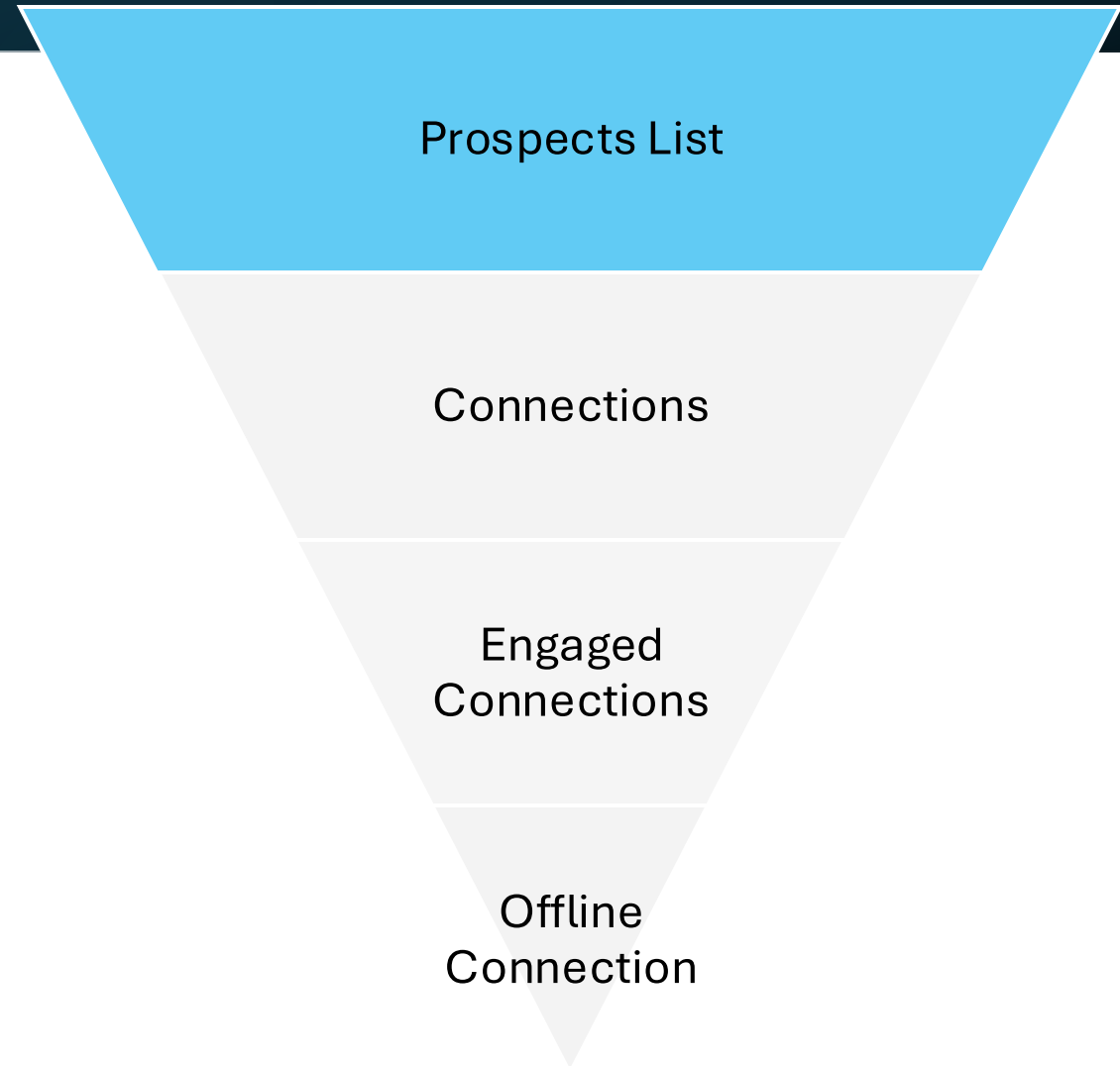
# Filtering for Prospects: Account List

- **Account Example:**
  - **Specific:**
    - Berkshire Hathaway, Compass
    - Yale New Haven Hospital
  - **Broad:**
    - Real estate Agents and Brokers
    - Health and Human Services/Connecticut



# Filtering for Prospects: Account List

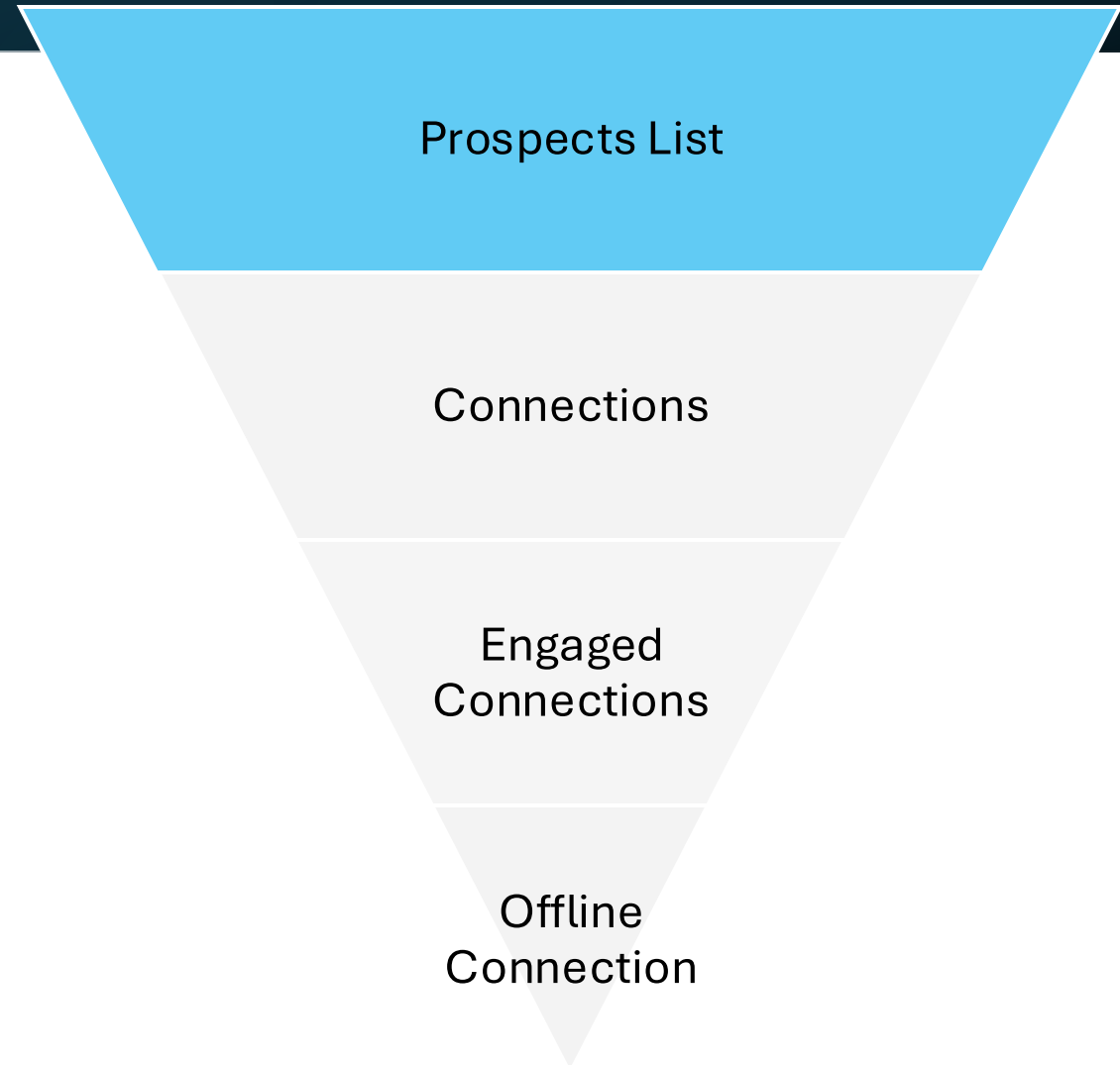
- Don't be so specific in the beginning that you get no results.
- Pick 2 or 3 filters ex.
  - Geography
  - Headcount
  - Industry



# Building a Lead List

## Review

- Weed out the junk
  - Look through search results
  - Check out LinkedIn Profile
- Save good ones to a list
- Review and Refine List
- Reach Out/Connect or Message



# Next Level Network Building: Leads

The screenshot displays the LinkedIn Sales Navigator interface. The top navigation bar includes 'Home', 'Accounts', 'Leads', and 'Messaging'. The search criteria are 'Real Estate Agent, Real Es...' with 2 filters applied. The left sidebar contains various filters such as 'Years in current position', 'Personal', 'Geography' (with 'Connecticut, United States' selected), 'Industry', 'First name', 'Last name', 'Profile language', 'Years of experience', 'Groups', and 'School'. The main content area shows a list of leads with columns for selection, profile picture, name, company, location, and duration. A red circle highlights a context menu for the first lead, which includes options for 'Connect', 'View profile', and 'Save'.

SALES NAVIGATOR Home Accounts Leads Messaging

Real Estate Agent, Real Es... (2 filters) Save search to get notified of ne... Select all Save to list Unsave 11K+ results

Years in current position + Account lists +

Lead lists +

Personal

Geography ▾ Connecticut, United States X + South Carolina, United Stat... (2M+) +

Industry ▾ +

First name +

Last name +

Profile language +

Years of experience +

Groups +

School +

People in CRM + To enable filter, upgrade contract

People you interacted with +

Saved leads and accounts +

3rd  
Real Estate Agent - Century 21 Classic Homes  
Greater Hartford  
8 years in role | 8 years in company  
About: Accomplished and resourceful team player offering expansive e

2nd  
Consultant - Self employed  
Fairfield, Connecticut, United States  
9 years in role | 9 years in company  
About: Consistent and effective professional with experience in E-commerce ...see more  
7 mutual connections Shared groups

3rd  
REALTOR - Corawell Banker Residential Brokerage  
New Milford, Connecticut, United States  
12 years 10 months in role | 12 years 10 months in company  
About: Fulltime REALTOR  
2 recent posts on LinkedIn

3rd  
Real Estate Agent - Better Homes and Gardens Real Estate Gaetano Marra Homes  
Trumbull, Connecticut, United States



# Next Level Network Building: Leads

The screenshot shows the LinkedIn Sales Navigator interface. At the top, there are navigation tabs for Home, Accounts, Leads (selected), and Messaging. Below the navigation is a search bar and filter options for Lead filters and Account filters. The main content area displays a list of leads under the heading 'Contractors Connections in CT', last updated on Dec 9, 2024. The list includes summary statistics: 26 Total results, 1 Changed jobs in past 90 days, 13 Posted on LinkedIn in past 30 days, and 3 Share experiences with you. The table below has columns for Name, Account, Geography, Notes, Outreach activity, and Date added. A red arrow points to the 'Notes' column header. A red circle highlights the dropdown menu for the first lead, which contains options: Message, Connect, Add to another list, and Remove from list.

| Name   | Account                            | Geography                             | Notes                         | Outreach activity | Date added |
|--|------------------------------------|---------------------------------------|-------------------------------|-------------------|------------|
| <input type="checkbox"/> Senior Executive Director   | + Add Account                      | Guilford, Connecticut, United States  | <input type="text"/> Add note | No activity       | 12/9/2024  |
| <input type="checkbox"/> Licensed Real Estate Broker | Compass                            | Greenwich, Connecticut, United States | <input type="text"/> Add note | No activity       |            |
| <input type="checkbox"/> Broker Partner              | Mygoodagent (+2)                   | New York City Metropolitan Area       | <input type="text"/> Add note | No activity       |            |
| <input type="checkbox"/> President                   | Pledge Property Services, LLC (+1) | Norwich, Connecticut, United States   | <input type="text"/> Add note | No activity       | 12/9/2024  |



# Samples Of Network Connections

- Junk Hauler-Referral Sources
  - Real estate professionals
  - Professional Organizers
  - Construction/Remodeling
- Physical Therapist-Referral Sources
  - Complementary not competitive connections
  - Referring Doctors
  - Wellness Centers
  - Massage Therapists
- Construction/Remodeling-referral sources
  - Home Inspectors
  - Real estate agents/Brokerages
  - Geographically located
  - Mortgage Brokers
  - Landscapers
  - Stonemasons



# Samples Of Network Connections

- HR Service Consultant- Client Sources

- LEAD individuals:
  - Current Job Titles
  - Geography
  - 2nd and third degree connections
- Account:
  - Sort on company revenue or headcount size
  - Geography
  - Job titles etc...

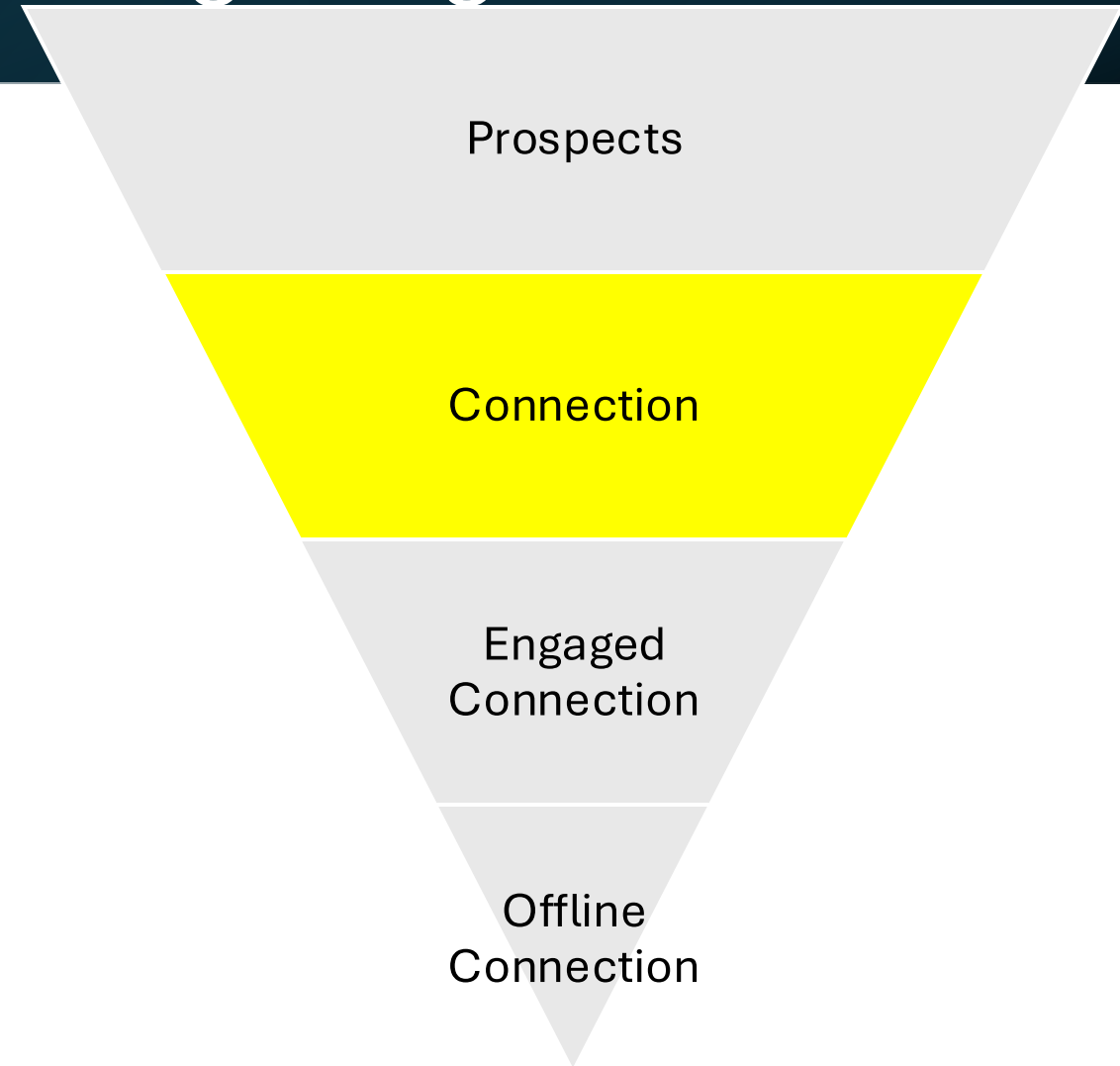
The screenshot displays the LinkedIn Sales Navigator interface. At the top, there is a navigation bar with the LinkedIn logo, 'SALES NAVIGATOR', and tabs for 'Home', 'Accounts', 'Leads', and 'Messaging'. Below this, there are tabs for 'Lead' (highlighted) and 'Account', along with a 'Collapse' button. The main content area is divided into several sections:

- Company:** A list of filters with expandable options (+):
  - Current company ⓘ ⚙️ +
  - Company headcount ⚙️ +
  - Past company ⓘ +
  - Company type +
  - Company headquarters location +
- Role:** A list of filters with expandable options (+):
  - Function ⚙️ +
  - Current job title ⚙️ +
- Buyer intent ⓘ:** Two toggle switches:
  - Following your company (turned off)
  - Viewed your profile recently (turned off)
- Best path in ⓘ:** A list of connection types with a collapse button (-):
  - Connection ⚙️ -
  - 1st degree connections
  - 2nd degree connections
  - Group members
  - 3rd+ degree connections
- Connections of:** A filter with an expandable option (+).



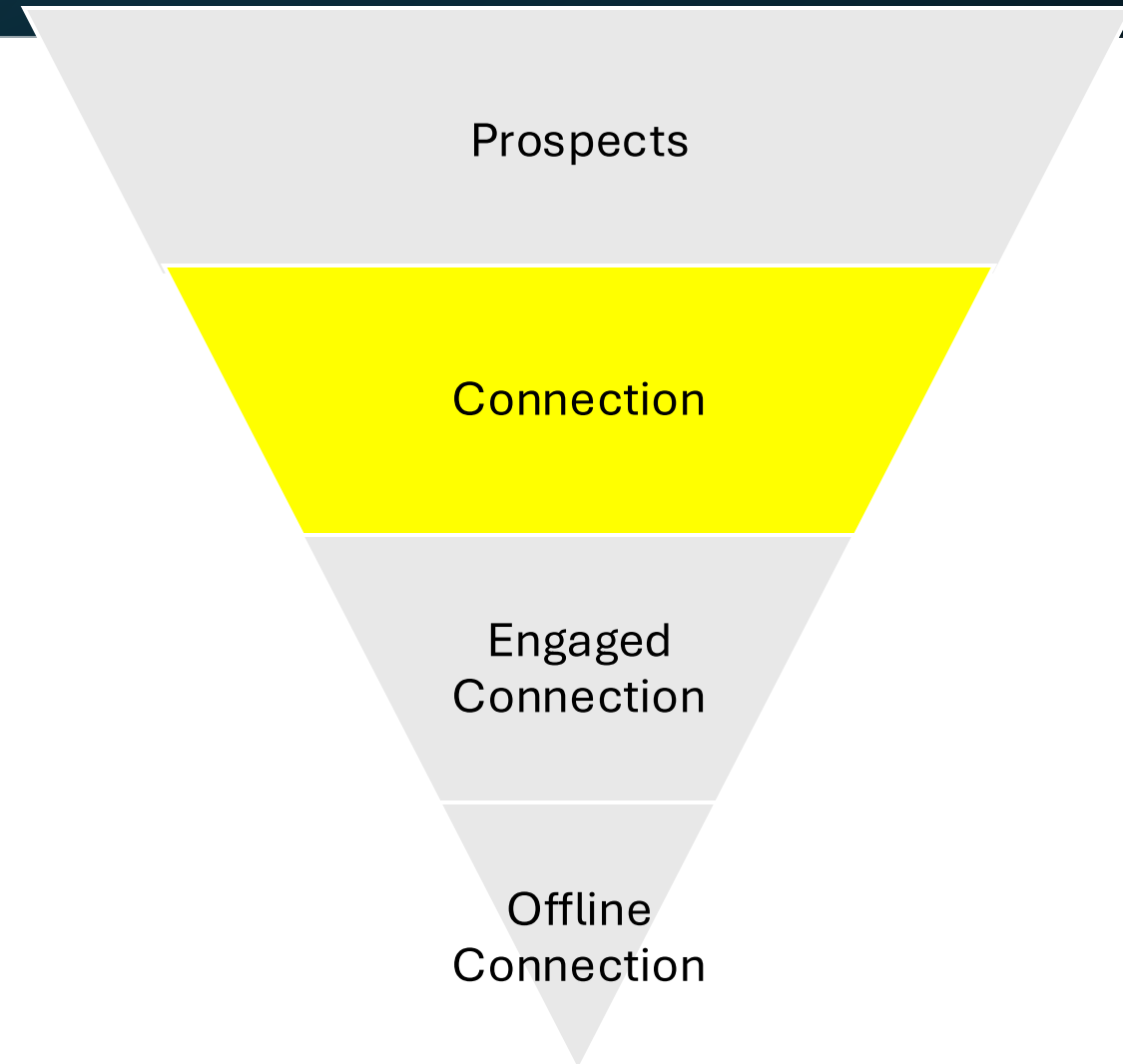
# Outreach- Get Your Message Right

- Initial Connection Message
  - Short and sweet
  - NOT an Ad! Keep it personal
  - Even though it's a sales process, don't make it too sales-y
- Personalize messages based on profile insights
- Be concise and professional
- Offer value to encourage a response



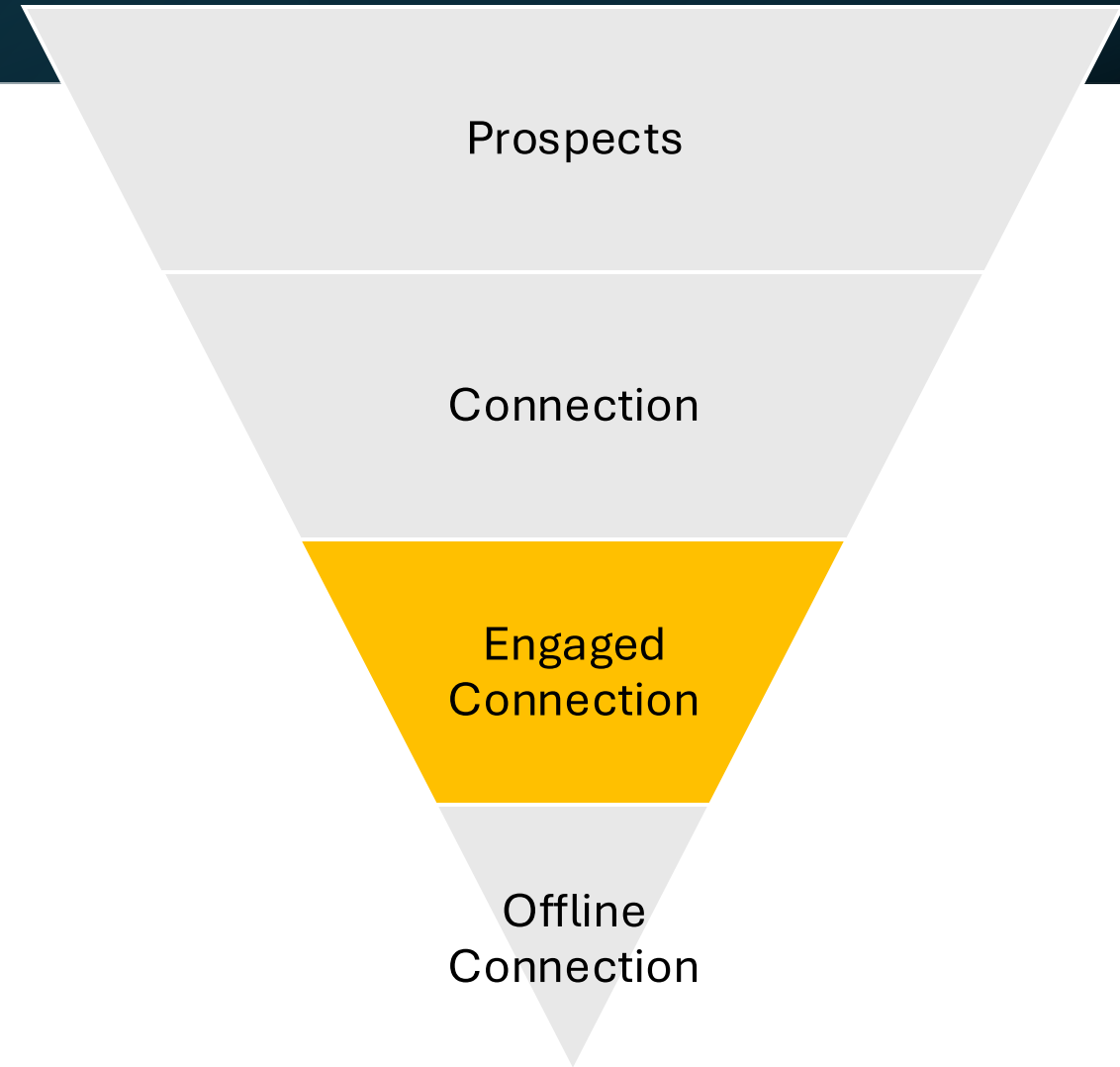
# Outreach- Get Your Message Right

- Connection message will be different for referral source prospect versus a direct client prospect
  - “We know a few people in common” versus “we serve the same type of client and would love to connect to refer business to each other”



# Build a Relationship

- Engagement messages after connection
  - Nurture and Engage
  - Invite to webinars, to a call, to meet at a conference
  - Invite to follow your business page



# Build a Relationship

- Engagement Tactics :
  - Comment on and like posts
  - Post & Share relevant content
  - Edit notification settings

The screenshot shows the LinkedIn Sales Navigator interface. At the top, there's a navigation bar with 'Home', 'Accounts', 'Leads', and 'Messaging'. Below that is a search bar and filter buttons for 'Lead filters' and 'Account filters'. The main content area is titled 'Settings' and has a sidebar menu with options: 'Sellers profile', 'Privacy and data', 'Email notifications', and 'In-product notifications'. The 'In-product notifications' section is expanded to show 'Notification & alert preferences'. This section includes a sub-header 'Activity about saved leads' and a list of notification types, each with a toggle switch set to 'On':

- A lead accepted your connection request
- A lead has engaged with posts from your company
- A lead was mentioned in the news
- A lead started a position at a new company
- A lead started a position at the same company
- A lead viewed your profile

At the bottom, there's a notification box that says: 'You will now receive alerts and notifications about updates your saved leads have shared.' Below this, there's a section for 'Activity about saved accounts' with a toggle switch also set to 'On'.

# Develop a Process. SAMPLE

1. Connect
2. Email thanking for connection
3. Invite to follow business page
4. Like and Comment weekly
5. Share your own posts
6. Invite to an offline event (webinar, conference, coffee, demo, etc...)



# Develop a Process. SAMPLE

- Key is discipline, process, volume and messaging
- Set aside 15 minutes a week to
  - Create and Filter Lead List
  - Connect
  - Engage



# Measuring



# Measurement KPIS

- Measurement KPIS:
  - Key performance indicators
  - Does not have to be complicated
- Examples:
  - Number of new connections made
  - Response rate to InMails
  - Engagement (likes, comments on shared content )
  - Conversion rates

Example:

\*\*\*Number of new connections made

| KPI GOALS    | build up to 15 new a week | 20% of new follow business page |
|--------------|---------------------------|---------------------------------|
|              | Personal                  | Business Page                   |
| 1-Mar        | 300                       | 2                               |
| 1-Apr        | 310                       | 4                               |
| 1-May        | 330                       | 8                               |
| 1-Jun        | 360                       | 14                              |
| 1-Jul        | 400                       | 22                              |
| 1-Aug        | 450                       | 32                              |
| 1-Sep        | <b>510</b>                | 44                              |
| 1-Oct        | 570                       | 56                              |
| 1-Nov        | 630                       | 68                              |
| 1-Dec        | 690                       | 80                              |
| 1-Jan        | 750                       | 92                              |
| 1-Feb        | 810                       | 104                             |
| INCREASE Y/Y | <b>510</b>                |                                 |

What is your average sale? If you convert only 10% of these new people to a customer what revenue does that represent?



# Nurturing Best Practices

- Best Practices for Prospecting on LinkedIn Sales Navigator
- Do's :
  - Use a professional profile
  - Review lists before reaching out
  - Optimize your profile and outreach strategies
  - Have a schedule to follow up regularly
  - Use templates sparingly and personalize
- Don'ts :
  - Spam with generic messages
  - Be overly pushy



# CRM

Customer relationship  
management



# Convert and CRM Integrations

- CRM Platforms
  - Hubspot
  - Salesforce
  - ZOHO
  - Pipedrive



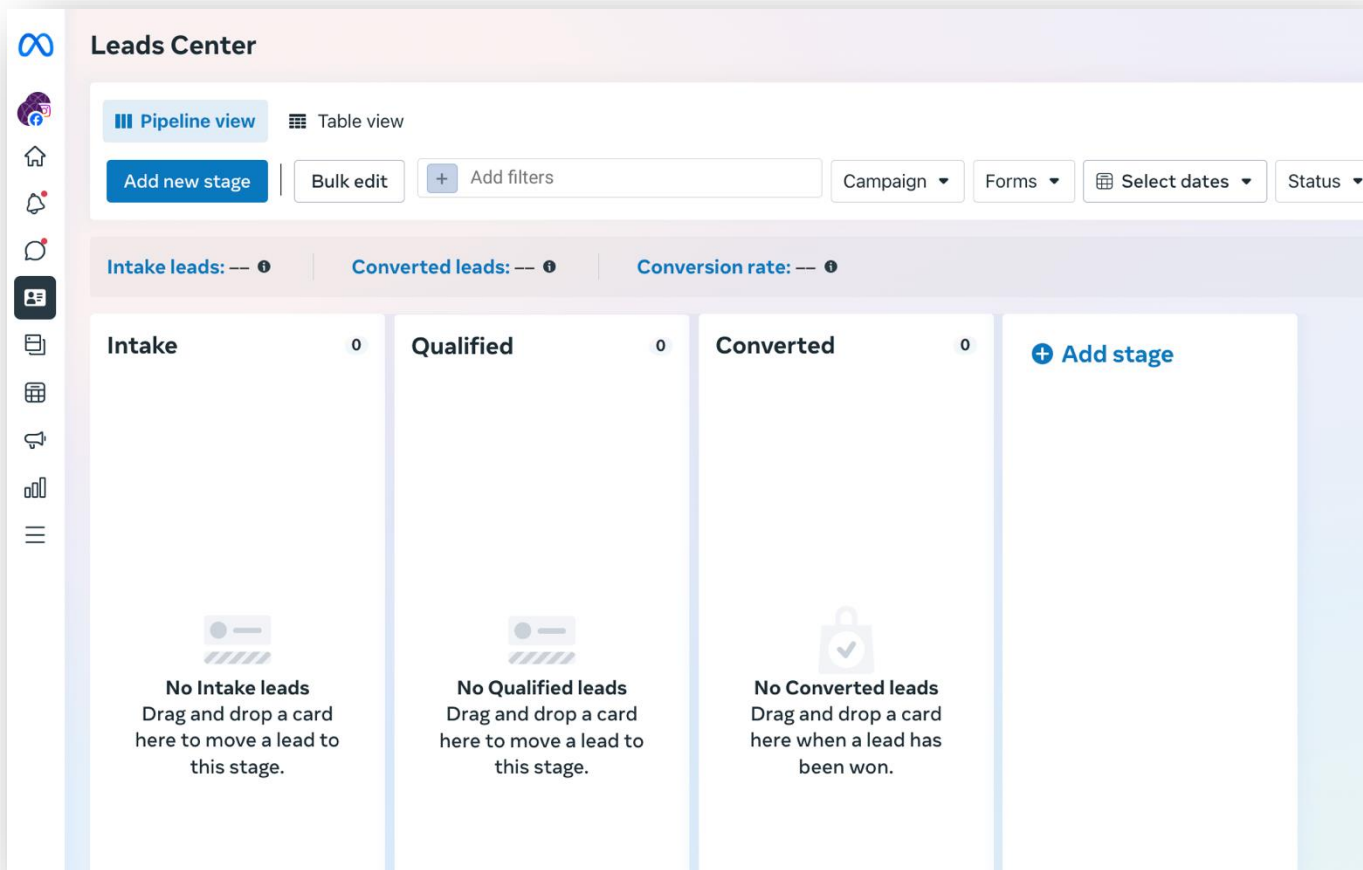
# CRM Pricing

Zoho CRM

Features ▾ Pricing Solutions ▾ Customers ▾ Resources

| Standard  | Professional  | Enterprise   | Ultimate   |
|---|---|--|--|
| US\$ <b>14</b>  | US\$ <b>23</b>  | US\$ <b>40</b>   | US\$ <b>52</b>   |
| /user/month billed annually   | /user/month billed annually   | /user/month billed annually  | /user/month billed annually  |
| <a href="#">START FREE TRIAL</a>  | <a href="#">START FREE TRIAL</a>  | <a href="#">START FREE TRIAL</a>   | <a href="#">START FREE TRIAL</a>   |
| All the essentials:   | Everything in Standard +  | Everything in Professional +   | Everything in Enterprise +   |
| <ul style="list-style-type: none"><li>✓ Mass email</li><li>✓ Custom fields</li><li>✓ Workflows</li><li>✓ Sales forecasting</li><li>✓ Custom reports</li><li>✓ Canvas</li><li>✓ Office 365 integration</li><li>✓ Google Calendar sync</li><li>✓ Zoho Marketplace</li></ul> | <ul style="list-style-type: none"><li>✓ Blueprint</li><li>✓ CPQ</li><li>✓ SalesSignals</li><li>✓ Inventory management</li><li>✓ Webhooks</li><li>✓ Assignment rules</li><li>✓ Validation rules</li><li>✓ Lookup fields</li><li>✓ Google Ads integration</li></ul> | <ul style="list-style-type: none"><li>✓ Zia — AI assistant</li><li>✓ Territory management</li><li>✓ Custom modules</li><li>✓ Custom functions</li><li>✓ Journey orchestration</li><li>✓ Multi-user portals</li><li>✓ Kiosk Studio</li><li>✓ Client scripts</li><li>✓ Sandbox</li></ul> | <ul style="list-style-type: none"><li>✓ Enhanced feature limits</li><li>✓ Extended AI capabilities</li><li>✓ Advanced customization</li><li>✓ Data preparation</li><li>✓ Augmented analytics</li><li>✓ Data storytelling</li><li>✓ Unified business insights</li><li>✓ Advanced administration</li></ul> |

# Pipelines



- LEAD Name
- Stage:
  - Contact/Intake
  - Qualification
  - Conversion
  - Other Stages
    - Emailed
    - Article Sent
  - Won/lost
- More advanced:  
Automation in Stage  
for some CRMs

# ...and First Steps

- Your first step is done!
  - Webinar and research!
  - Defined your target audience
- Next step:
  - Sign up for LinkedIn Sales Navigator / Trial
  - Begin prospecting using advanced search
- Just Start:
  - network and track your results



# Thank You

- Connect with me on LinkedIn!!

[Anne.Driscoll@scorevolunteer.org](mailto:Anne.Driscoll@scorevolunteer.org)

[Anne.Driscoll@thegreatlyagency.com](mailto:Anne.Driscoll@thegreatlyagency.com)

