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## Educating Advisors on Client Acquisition & Retention

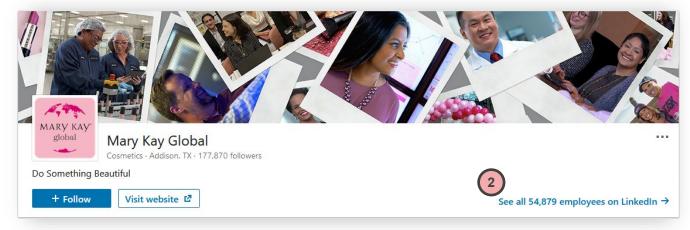
## **LinkedIn Company Search**

When targeting prospects at a specific company, identifying existing connections who can provide warm introductions to ideal individuals can make all the difference.

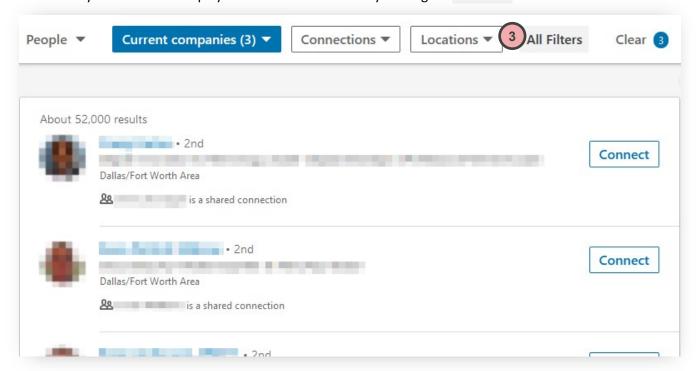
Follow these steps to quickly find such opportunities:



- 1. Go to the company's LinkedIn page by typing in the company name in the search box.
- 2. Click on the See all... Employees on LinkedIn link in the upper-right.



3. Many results will be displayed. Refine the result list by clicking the All Filters button above the list.



The **Filters** Page will load with 12 filters you can use. Below are the recommended:

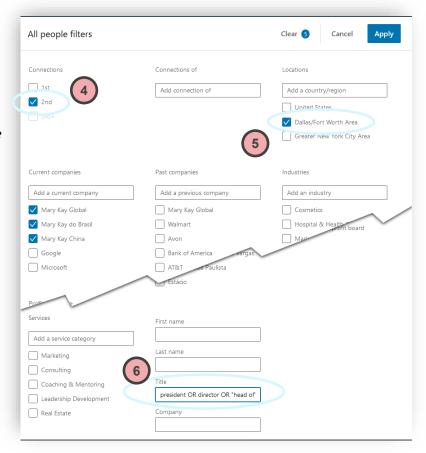
4. Under Connections, check "2nd".

Remember, this is the sweet spot on LinkedIn. It's people you know who are connected to people you potentially want to be introduced to.

5. Under **Locations**, check the specific location, you wish to target.

If you don't see your desired location you can type it in the Locations text box "Add a country/region".

- Scroll further down the page to the
  Title filter and enter titles that
  apply to your demographic (e.g.
  president OR director OR "head
  of"). Best to use Boolean logic if
  searching for more than one title.
  See Boolean cheat sheet.
- 7. Click the **APPLY** button in the upper-right.



When the results appear, you should have a much more refined list – in this case we have 287 results. If you wish to refine further, you can click the **All Filters** button again to add more parameters.

Under each name and title listed, you will also be given a list of anyone who is a shared connection (2<sup>nd</sup> degree connection). You can click this information for more details. Additionally, click on the names of individuals that fit your ideal prospect profile and determine if they are an individual you'd like an introduction to. If so, use the <u>Asking for Introductions</u> cheat sheet for intro scripts.

