

Outreach Messaging

HAPPY BIRTHDAY (Prospect)

Hi [Name],

Happy Birthday - Hope you have a great birthday and year ahead!

Best,

[name]

T xxx-xxx-xxxx

HAPPY BIRTHDAY (Client)

Hi [Name],

Happy Birthday - Hope you have a great birthday and year ahead! Let's celebrate, how about next (day)?

Best,

[name]

T xxx-xxx-xxxx

NEW JOB (Make sure it is in fact a 'new job', LinkedIn will trigger a New Job even if it's a title change)

Hi [Name],

Congratulations on your new job! How exciting, please let me know if you need any help with your rollover assets.

Best,

[name]

T xxx-xxx-xxxx

WORK ANNIVERSARY (Prospect)

Hi [Name],

Congratulations on your work anniversary, what an accomplishment! Wishing you many years of continued success.

Best,

[name]

T xxx-xxx-xxxx

WORK ANNIVERSARY (Client)

Hi [Name],

Congratulations on your work anniversary, what an accomplishment! Would love to take you out to celebrate, how about next (day)?

Best,

[name]

T xxx-xxx-xxxx

PROSPECTING OUTREACH

Hi [Name],

Congratulations on your new job, how exciting! Please let me know if you need any help with your rollover assets, happy to help.

Best,

[name]

T xxx-xxx-xxxx

Hi [Name],

It looks like we share a lot of common connections (mention who) – would love to have a phone conversation to learn more about you and your business.

Interested?

[name]

T xxx-xxx-xxxx

Hi [Name],

I wanted to reach out because I believe I can help you with your retirement and benefit options, as I have helped our mutual connections [fill in names]

Interested in my expertise?

Best,

[name]

T xxx-xxx-xxxx

Hi [name],

I noticed you are in the pharma industry, I have helped many with their retirement and benefit options including some of our mutual connections [mention who - name drop].

I would like to have a quick conversation with you to see if I can be of any assistance. Would you mind if I gave you a quick call this week?

Best,

[name]

T xxx-xxx-xxxx

INVITATION REQUESTS

NEXT GENERATION INVITATION REQUEST (*they know you*)

Hi [Name],

As you know I am your parents Financial Advisor. I would love to make you part of my LinkedIn network. As always, if there is anything I can do for you please let me know.

Best,

[name]

T xxx-xxx-xxxx

NEXT GENERATION INVITATION REQUEST (*they do NOT know you*)

Hi [Name],

While you and I haven't met yet, I've had the pleasure of working with your parents for XX years. I would like to connect with you on LinkedIn and look forward to meeting you in person sometime soon.

Best,

[name]

T xxx-xxx-xxxx

CLIENT INVITE (they are on LinkedIn already)

Hi [Name],

I am building out my LinkedIn network and would love to make you a part of it. As always, if there is anything I can do for you please let me know.

Best,

[name]

T xxx-xxx-xxxx

CLIENT INVITE (they are NOT on LinkedIn)

Hi [Name],

I have been using LinkedIn for some time now and would love to make you part of my network. Please consider creating an account. Happy to help!

Best,

[name]

T xxx-xxx-xxxx

PROSPECT INVITE (from event)

Hi [Name],

It was so nice meeting you at [event] on [date]! I would love to add you to my LinkedIn network. If there is anything I can do for you please let me know.

Best,

[name]

T xxx-xxx-xxxx

PROSPECT INVITE (someone in common)

Hi [Name],
I noticed you were connected to _____, I am great friends with him/her! I would love to add you to my LinkedIn network. If there is anything I can do for you please let me know.
Best,
[name]
T xxx-xxx-xxxx

PROSPECT INVITE (prospect has asked you to connect - you can respond without accepting invite)

Hi [Name],
Thank you for reaching out to me thru LinkedIn. Please share with me why you'd like to add me to your network. Happy to have a quick conversation to discuss.
Best,
[name]
T xxx-xxx-xxxx



Idea Share!

When an individual accepts your LinkedIn invite send them a personalized LinkedIn message such as:

*Hi [Name]
Thank you for adding me to your network, I'm honored to have you as a part of it. I look forward to speaking with you soon!
Best,
[Name]
T xxx-xxx-xxxx*

It's an advisor best practice to personalize a LinkedIn invitation request. Why? It differentiates you and shows that you care about the relationship from the first interaction.