## Laura Virili

**EDUCATING ADVISORS ON CLIENT ACQUISITION & RETENTION** 

## **LinkedIn 2<sup>nd</sup> Degree Connections**

Filter your connection's connections to find ideal prospects so that your connection can provide a warm introduction.

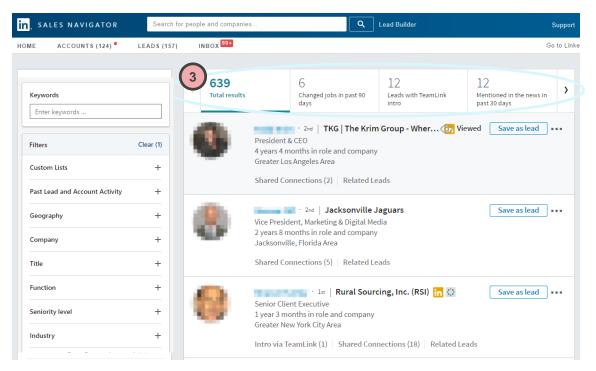
Advisor Best Practice! Before meeting or calling a client, review their connections to uncover possible prospects for a warm introduction.

Your 2<sup>nd</sup> degree connections are the **sweet spot** on LinkedIn! Why? Because they each have at least one 1<sup>st</sup> degree connection in common with you. An advisor best practice is to source names for introductions from your connections, pre-qualify them and then ask for an introduction to 3-5 individuals you would like to be introduced to.

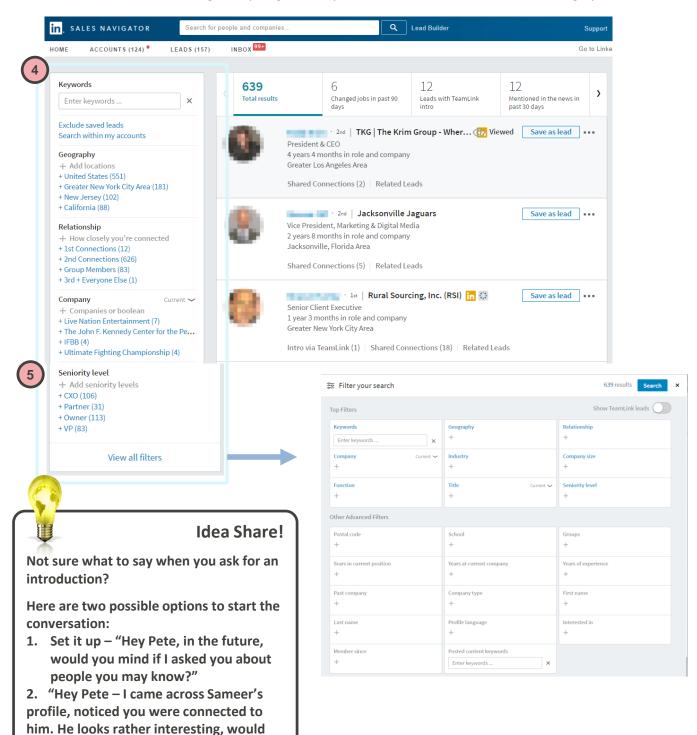


- 1. Go to the client's profile
- 2. Click on their connections
- 3. Use the menu on the top for low-hanging fruit; job changes, mentioned in the news, shared experiences, shares on LinkedIn

**Sales Nav Advantage!** Every time you preform a search within Sales Nav, you will be given a customized menu for that search that contains job changes, mentioned in the news, shares on LinkedIn, shared experiences. Use each bit of information to your advantage!



- 4. Use the menu on the left-hand side to filter down & find ideal prospects using the **Geography**, **Relationship**, **Company**, **Industry**, **Company size**, **Function**, **Title**, **Seniority level or View all filters** functionality
- 5. Use the View all filters to get very targeted, as you will have access to all filters including zip code



you recommend that I talk/meet him?"

Set the stage with clients, friends & family so that you can ask for introductions in the future.