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EDUCATING ADVISORS ON CLIENT ACQUISITION & RETENTION

Sales Navigator – Prospecting

Find the right people quickly and easily with premium search filters that reflect the way you prospect. Premium search filters help you to identify potential prospects by seniority level, function, geographical location, years of experience, company size, etc.

Each search can be saved for future reference *and* automatic email alerts can be created for saved searches, meaning every time someone new fits your saved search criteria LinkedIn will send you an email alerting you to new prospects.

Warm Introductions:

Let's say you wanted to get in front of C-suite executives in the pharmaceutical industry within 10 miles of your zip code. Using Sales Navigator you can quickly find a connection within your network that meets your search criteria and can give you a warm introduction.

1. Click on All filters > Lead filters from the

in SALES NAVIGATOR Home Lists Saved Searches Messaging Admin Alf filters

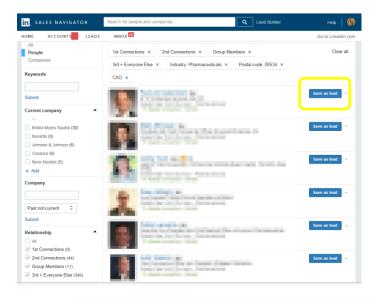
top menu bar.

2. You are presented with free form text boxes; Keywords, Current Company, etc. as well as categories; Function, Seniority level etc. We are looking for C-suite executives in the pharmaceutical industry.

- 3. From Seniority Level select 'CXO'. CXO covers the entire C-suite; CEO, CFO, COO, CMO, CTO, CIO etc.
- 4. From Industry select 'Pharmaceuticals' Note: there are over 100 industries to chose from
- 5. From Location click on Postal code, insert your zip code, country, and the radius you desire; 10 miles
- 6. Once you have completed your selections select **search** and your results will appear (*next page*)

y Current Company size + Seniority level +
Current Seniority level
Current Seniority level
+
Groups

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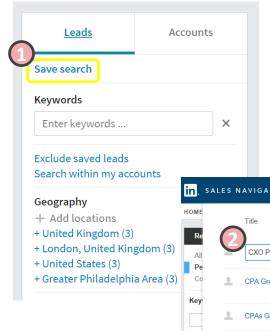


Review your search results, if necessary you can continue to filter your results by using the filters on the left-hand side. If an individual is of interest to you make sure you save him/her as a **lead** so that you receive updates.

In addition, if you like the results you can **save** the search (see below), which in turn becomes a warm lead list!

Save Your Warm Lead Lists!

You can save your searches and receive alerts whenever a new person has been added to your search, for example, if someone creates a LinkedIn account, is located in the geographic area indicated, etc. you will be alerted. You can save as many searches as you would like in Sales Navigator, however you can only save 15 to be alerted on. Therefore if you select 'never' that will not count against your 15 quota. Anytime you want to get back to those saved searches click on 'saved searches'.



- 1. If you'd like to save a search click on Save search
- A dialogue box will appear, you can name your search and chose how often you'd like to be alerted as to when new people match your search criteria; daily, weekly, monthly, never.
- 3. Once complete click on the green check box.
- To return to Saved searches in the future click on Lead Builder and select Save search from left-hand menu.

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