

Asking for Introductions

The ability to identify warm leads on LinkedIn is one of the most powerful features. Asking for the introduction can be as easy as identifying your style and practicing so it feels natural for you.

Planting Seeds

Hi Susan, I was wondering if I ever come across someone interesting, and you potentially know them, is it OK if I run them by you for your opinion?

Hey Pete, it appears that you have many connections to (niche, company, etc.) I have many clients that (work for company XYZ, are doctors, etc.) if I come across any of your connections that I find interesting could you make across introduction for me?

Requesting a Warm Introduction

Direct Approach

Ryan, I noticed you are connected to Sallie Smith on LinkedIn. How well do you know her? (WAIT FOR RESPONSE) I would love to meet Sallie. What would be the best way for you to introduce me socially?

Basic Approach

Ryan, I saw you were connected to a few people on LinkedIn who look like the type of people I work with. In particular, I noticed Sallie Smith. How well do you know her? (WAIT FOR RESPONSE) Do you think she someone is I should be talking to?

Insight Approach

I was going to reach out to Sallie Smith on LinkedIn and I noticed you were connected to her. I'd love your insight on the best way to meet her.

General Approach

Ryan, I noticed you are connected to Sallie Smith on LinkedIn and I noticed you were connected to her. I'd love your insight on the best way to meet her.

Correspondence Request:

I noticed you were connected to Jim Lock on LinkedIn. He actually looks like the type of client we typically work with. How well do you know him? [Wait for response]. Would you be willing to make a cross introduction for me? [Wait for response] if so I'd be happy to provide you the introduction language.

Survey Referral:

Thank you for filling out the survey we recently sent out. It greatly informs us of how her clients are feeling. You noted you would be open to referring us and I noticed a few individuals you were connected to on LinkedIn Jim Peters and Paula Dunn. How well do you know them? [Wait for response] Would you be willing to make an introduction?

Overcoming Objections

They already have a financial advisor

Your connection: I'm almost positive they already have a financial advisor.

Your response: Oh yes, I'm sure they do, most of my clients had financial advisors prior to working with me but I would truly just like to meet them socially.

I'll get back to you...

Your connection: Let me check with Sameer and I'll get back to you.

Your response: Thank you so much, I really appreciate you reaching out to him. I'll give you a quick call this Thursday, after you've had a chance to speak with Sameer and we'll go from there.

The online connection

Your connector: I'll provide the cross introduction via email.

Your response: Thanks so much, I really appreciate it. If you think there's an opportunity where I could meet them in person even better. I would love to take the two of you out to lunch, or a ball game, or coffee, or drinks (chose the one that best fits)

You don't want to meet him!

Your connection: You probably don't want to meet Jackie Summers, she's (insert excuse).

Your response: Thank you for your honest insight. If I find anyone else on LinkedIn you're connected to that I find appealing is it okay if I run them by you for your opinion?

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