

### Best Practice: Social Triggers

One of the secrets to generating new business on LinkedIn? Time blocking. Spend 5-10 minutes/day to review what is happening within your network; birthdays, work anniversaries and new jobs (money in motion). Then pick up the phone or send a personal message to deepen client relationships and stay in front of prospects. It's that easy!

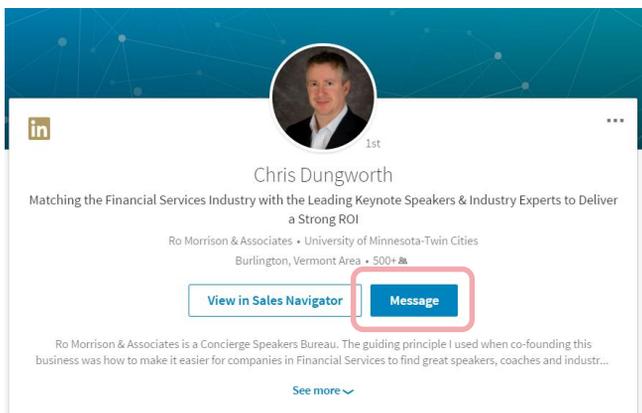
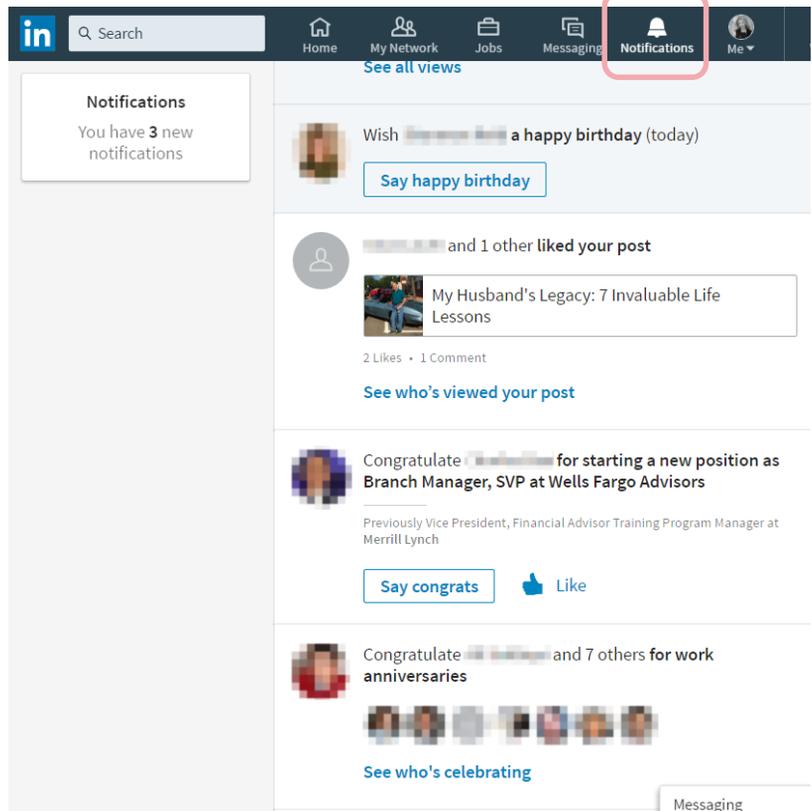
Click on **Notifications** from the top tool bar:

Providing you with the following to act upon:

**1. New Job** – this is money in motion! Pick up the phone and congratulate them on the new job, invite them out to celebrate and offer to help with any rollover assets.

**2. Birthday** – Either pick up the phone or send a personalized message (or surprise & delight gift – e.g., [Cherly's](#) \$6 'Happy Birthday' Cookie card) to wish your client/prospect a Happy Birthday!

**3. Work Anniversary** – Either pick up the phone or send a personalized message (or surprise & delight gift – e.g., [Cherly's](#) \$6 'Congratulations' Cookie card) to congratulate your client/prospect on the anniversary.



Send a personalized message to your clients/prospects by clicking on their name, once you land on their profile page click on the **Message** button. A dialogue box will open and you can customize a message. Once complete simply hit **Send Message**.

# Social Triggers: Messages

## **HAPPY BIRTHDAY (Prospect)**

**Happy Birthday**

Hi [Name],

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

Best,

[name]

T xxx-xxx-xxxx

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## **HAPPY BIRTHDAY (Client)**

**Happy Birthday**

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

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

**Congrats!**

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

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## **WORK ANNIVERSARY (Prospect)**

**Congrats!**

Hi [Name],

**Congratulations on your work anniversary, what an accomplishment!**

Best,

[name]

T xxx-xxx-xxxx

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## **WORK ANNIVERSARY (Client)**

**Congrats!**

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