

### LinkedIn Sales Navigator – Leads: Your Target Market

With LinkedIn Sales Navigator, you can focus on the right people at the right companies, stay up-to-date with what’s happening, build trust, shorten sales cycles and achieve your goals as a financial advisor.

Sales Navigator is a separate LinkedIn platform. When you upgrade to Sales Navigator you will maintain your free LinkedIn account and will have a second LinkedIn account, Sales Navigator, that you will customize, allowing you to focus on ONLY the clients, prospects, COI, alumni, etc. you are most interested in. However, you have to instruct Sales Navigator as to who you are interested in and then save those individuals as leads.

*Note: LinkedIn uses the term ‘lead’ to define anyone that you want to stay up-to-date on, whether they are a client or not. In addition, LinkedIn uses the term account and company interchangeably.*

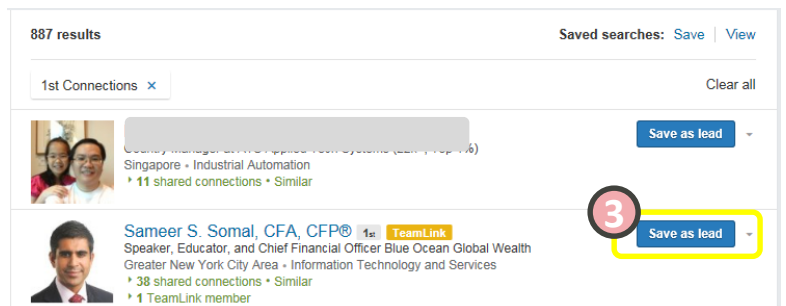
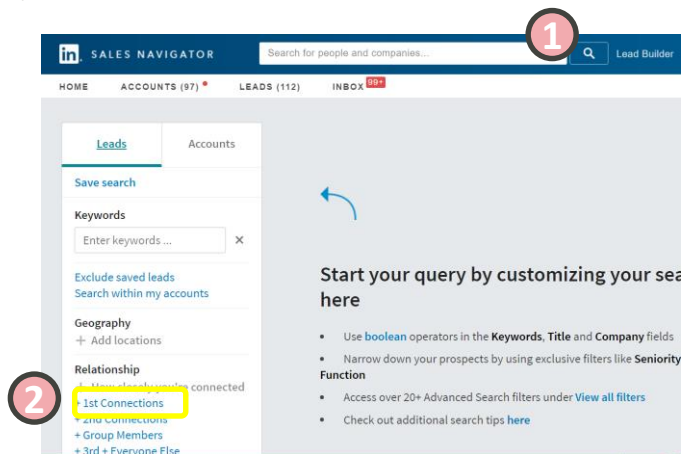
For example, let’s say you have 1,200 1st degree connections and out of those 1,200 connections there are 100 that are ‘A-rated’ clients and prospects that you want to stay updated on. Sales Navigator allows you to do just that – stay focused on just those 100, here’s how.

#### How to Build Your Lead List:

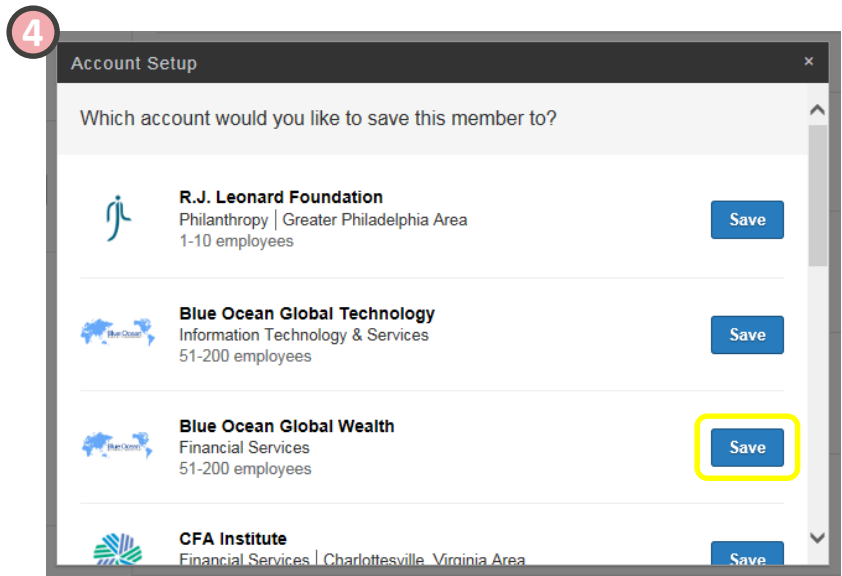
1. Click on the magnifying glass.

2. A left-hand menu will load. Begin by looking only at your 1st degree connections by clicking on the menu item titled “1st degree Connection”. Once complete, all your 1st degree connections will load.

3. Begin reviewing your 1st degree connections and when you have identified someone you would like to save as a ‘lead’ click on the ‘Save as lead’ box.



4. When you save an individual as a lead it will associate that person with a company, in LinkedIn terms it is known as an 'Account'. If the individual only has one company shared on LinkedIn it will automatically save to that account. However if the lead is associated with more than one company, like in this example of Sameer Somal, LinkedIn will ask which account you would like to associate that lead to. In this example, I have selected **Blue Ocean Global Technology**.



**Continuing Building Your Lead List:** Once you have completed your 1<sup>st</sup> degree connections, go thru your pipeline, those individuals will more than likely be 2<sup>nd</sup> or 3<sup>rd</sup> degree connections. Follow the same steps from above to save individuals as leads and their associated account (company).

**Huge benefit of Sales Navigator and truly a game changer:** In LinkedIn you only get access to your immediate network (1<sup>st</sup> degree connections). With Sales Navigator you gain access to 2<sup>nd</sup> and 3<sup>rd</sup> degree information as well. Such as, job changes, mentions in the news, work anniversaries and more.

**In addition:** If you come across a prospect that is a 3<sup>rd</sup> degree connection, save them as a lead. When they become a 2<sup>nd</sup> degree connection you will be alerted!

**A Listing of Your Leads:** Your saved leads can be found on the top menu item under 'Leads':

