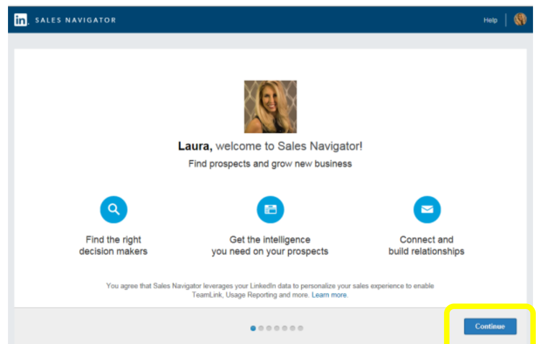
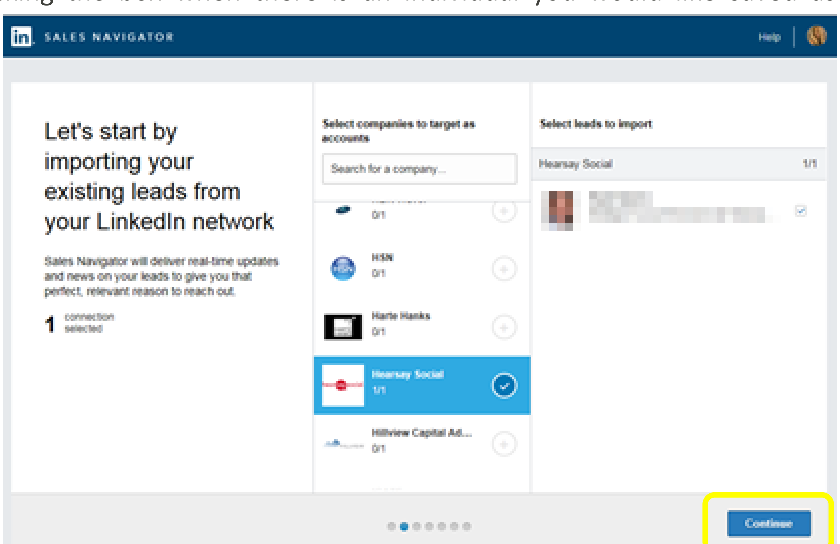
LinkedIn Sales Navigator – Set Up

LinkedIn Sales Navigator provides an onboarding process. It is recommended that you go thru it because the more info you share about your prospects, territory, etc. the more relevant the recommendations and insights become.

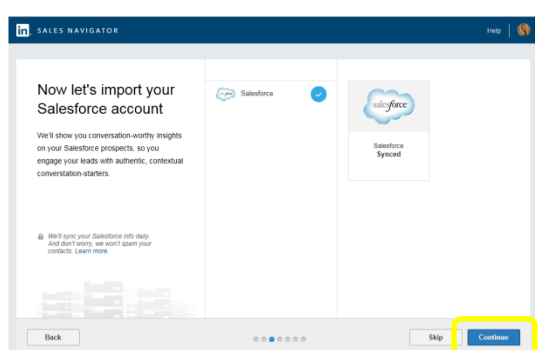
1. Sales Navigator Set Up Upon login you will land on a welcome page with your profile pic to ensure you are in the correct account.



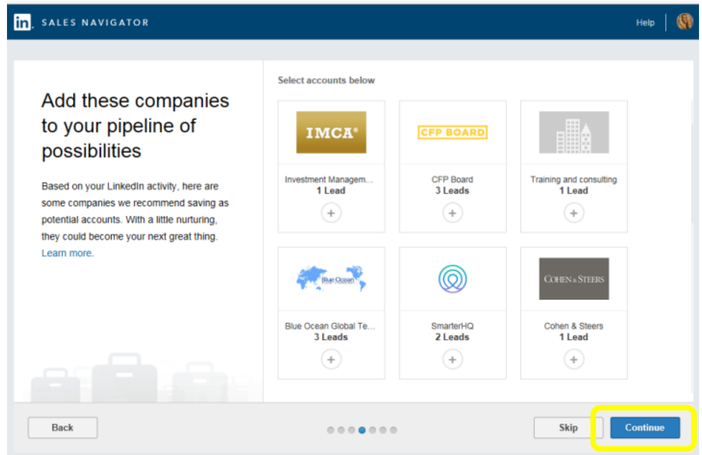
2. Existing Contacts You can import your existing first degree connections from LinkedIn by reviewing the list and checking the box when there is an individual you would like saved as a 'lead'. Click 'Continue'.

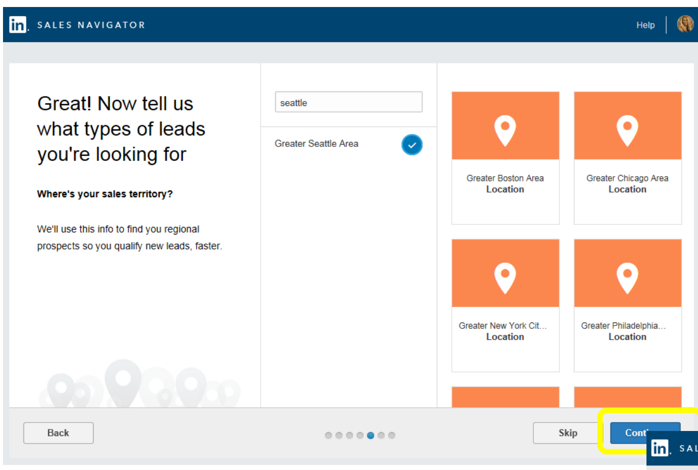


3. Salesforce.com If you use Salesforce.com and are able to import your contacts, it is recommended you do so. Simply follow the prompts and when complete, click the 'Continue' button.



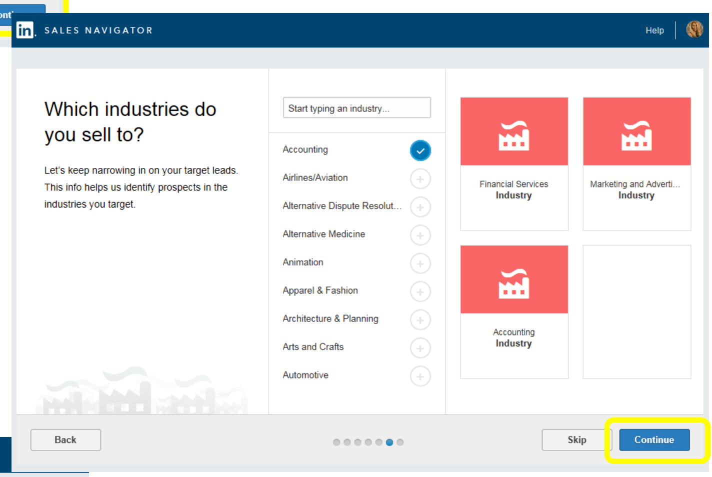
4. Companies LinkedIn will bring in suggested companies based on your previous activity. When you see companies you are interested in simply click on the plus symbol to add the company. When finished click ‘Continue’.

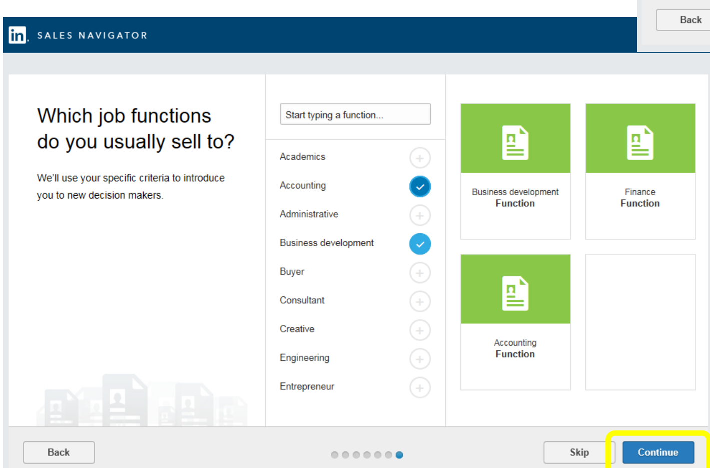




5. Territory LinkedIn will want to know about your sales territory. Enter the cities, states or countries of your territory. When you see the location you’d like click on the plus icon to add it. When finished click ‘Continue’.

6. Industries Narrow down the industries that you most often sell to. You don’t want leads for all industries. Scroll thru the list and when presented with your niche click on the plus icon to add it. When finished click ‘Continue’.





8. Job Functions Select the job functions of these leads by scrolling thru the list and clicking the corresponding plus icons. Click ‘Continue’ and your done!

Be sure to reference future cheat sheets.