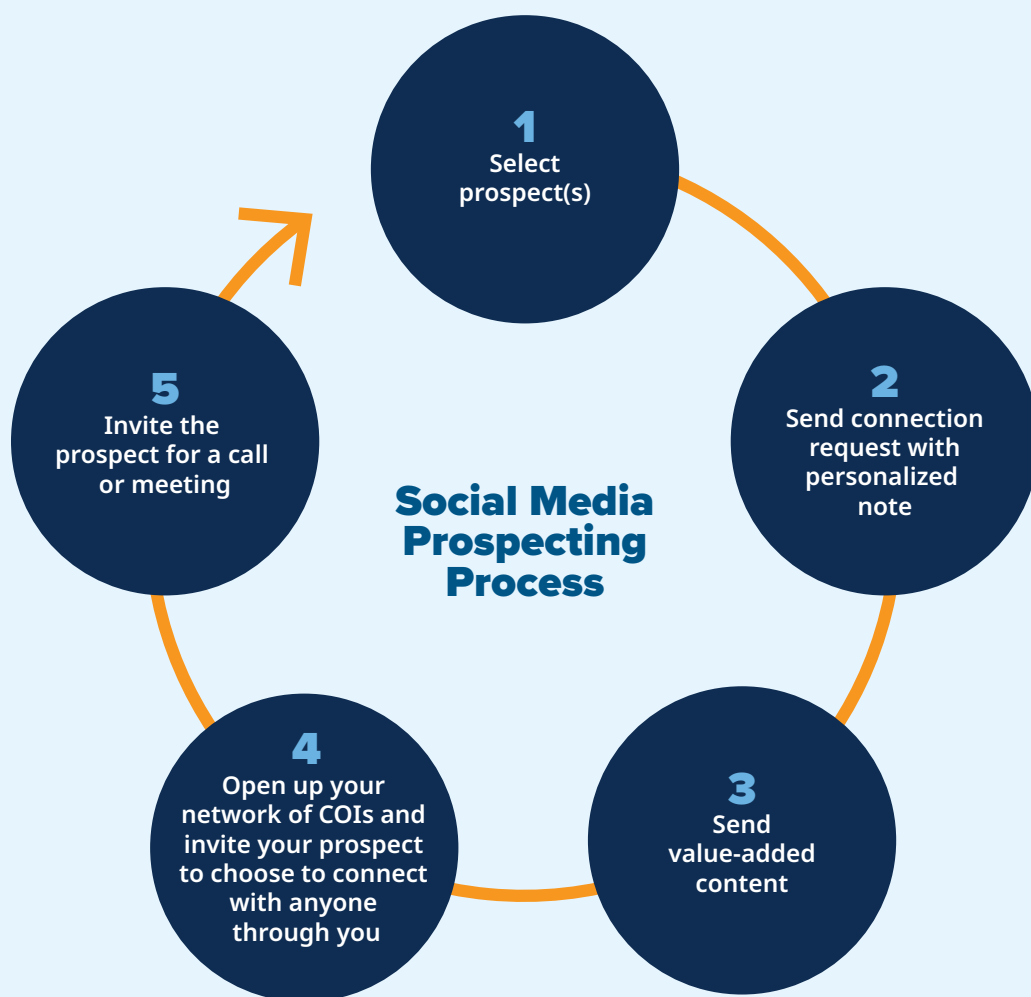


# Connecting with confidence and consistency on LinkedIn.

## Leveraging your process to build trust with prospects.

Looking for an effective and tested LinkedIn prospecting process? Well, look no further. This process has been tested and proven by advisors who have implemented it as part of their social media strategy. When used consistently and constantly, advisors have reported on average converting 10 new prospects to clients in a given year.



## Pre-work:

### 1. Do your research:

- Niche market interests: \_\_\_\_\_
- Specific market needs: \_\_\_\_\_
- Interests:
  - ☐ Personal
  - ☐ Business
  - ☐ Community
  - ☐ Family
  - ☐ Career

### 2. Compliance approved scripts

- ☐ Yes    ☐ No

### 3. Have a pre-determined list of COIs you plan on referring your prospect to. Speak with your COIs before initiating this process and get their confirmation that they want to build this pipeline with you.

- List COIs here:

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## Step 1: Select prospect or group of prospects

Find a prospect or group of prospects you want to build a relationship with on LinkedIn. Try to group them based on interest or commonality. This tip will help reduce the time spent personalizing your next few steps. So, how many prospects should you target at once? Depending on your prospecting time commitment, the recommendation is 1 to 5 per day.

List group: \_\_\_\_\_

Common interests: \_\_\_\_\_

## Step 2: Send the 5 prospects a request to connect and include a personalized note

Almost everyone dislikes receiving templated scripts that don't apply to what they need or want. At this step, personalize the reason for connecting and state your desire to build a relationship. Find items you have in common with the prospect. Be friendly yet precise.

*Kristina,*

*I know we've never met before, but I noticed we have multiple connections in common, including Robert Wilson – he's a great person! I also see we both have many connections with small business owners (the real reason for connecting). In lieu of how much we have in common; I would love to connect.*

*Best,*

*Jane Smith*

To combat the 8-seconds attention span – remember to keep it short and concise!

### **Step 3: Send value-added content to your prospect**

Once your prospect has accepted your connection, the next step is to send them value-added content. When you are having your morning coffee and going through your newsfeed, find an article you think would be of value to your prospect and send it to them. Don't just share it - explain why you thought of them and how it will benefit them. Again, keep it short and friendly.

*Good morning Kristina,*

*Thanks again for connecting with me! When I came across this article this morning, I thought about you and your business. Through your social media postings, I've noticed that you have been doing a lot of valuable work with supporting other female business owners. As such, this article has some innovative ideas I haven't heard about before that seem very effective! Check it out here [insert link] and let me know your thoughts.*

*Best,*

*Jane Smith*

Why does this strategy work? It comes down to the simple law of reciprocity “when you give you receive”. In a social media strategy, this translates to “send and you will receive”. The goal is to build an authentic relationship based on common interests before proposing to do business together.

### **Step 4: Open up your network of COIs and invite your prospect to choose to connect with anyone through you**

Have you ever heard of a digital introduction? This is a powerful strategy that portrays you as a caring and true partner to your prospects. Once you have connected with your prospect on LinkedIn, you will want to open up your LinkedIn network to them. To help them figure out who would be the best COI to work with them, suggest 1-3 in the message.

*Good afternoon Kristina,*

*I hope you found the last article I sent as interesting as I did. Did you end up implementing any of the ideas? (follow-up from the last article you sent).*

*Last week, I was having a conversation with Sally Brown, Tax Accountant, who is passionate about helping small business owners. She particularly helps them determine areas for growth by providing insight on cash flow patterns, inventory management, pricing, and business financing. If you would like me to make an introduction, I would be more than happy to do that for you. In addition, if you notice anyone else in my network you're interested in meeting, let me know. That's what LinkedIn is for right?*

*Best,*

*Jane Smith*

## Step 5: Invite prospect for a call or meeting

At this point, there has been some engagement between yourself and the prospect. You have shown that you care for your prospect and you intend to help them in their area of need. Now, it is time to take it to the next level and invite them for a consultation call and/or meeting.

*Hi Kristina,*

*I hope you are doing well! I wanted to reach out to see if you would like to have a call (or meeting) to discuss how we can work together to achieve your business and life goals. As I mentioned earlier, my speciality is working with small business owners and I am confident that if we partner together, we can tackle any challenge or complex situation and come out on top.*

*I have blocked these dates/times for you, please let me know which one works best for your schedule:*

- *[date & time]*
- *[date & time]*
- *[date & time]*

*If you click on this link [insert advisor website], it will take you to my website where I have given you exclusive access to see some of my top viewed articles and posts from small business owners such as yourself.*

*Looking forward to meeting you.*

*Best,*

*Jane Smith*

## Final words: A good process produces real results

Whether you decide to implement all the steps in this process or just some (for compliance reasons), you benefit from a consistent approach to engaging prospects using social media. Just like any plan or strategy, you don't want to focus on the end goal or area of business you want to improve – you want to strike the perfect balance between building “trust” and being “consistent”.

