

**CONNECT** 365  
The Marketing Lab



Take  
the  
lead.



THE MARKETING LAB

# My Biggest Time-Saving Tricks when Prospecting on LinkedIn

How to be most efficient with your LinkedIn prospecting, database building and email gathering...

*With me today...*



Jasper Blake

# Why LinkedIn...



Over **500+** million users



**25%** of adult internet users in US are on LinkedIn



**40%** check LinkedIn daily. (76% for executives)



Most affluent demographic.



Millions of businesses.

*Where else can I:*

*Hand select the right people?*

*With extremely ACCURATE contact info?*

*Instantly build more awareness...*

# 6 Tips to More Efficient Prospecting

1. Define Prospect Profile.
2. Build Search(es).
3. Write Connection Request Script.
4. Assembly Line Process.
5. Set Goal & Track.
6. Email Gather in Bulk.

## Your Prospect Profile:

...is all about understanding exactly who your ideal prospect is. It's a cheat sheet that identifies exactly who your ideal client is.

*I can work with anyone.*

*I can work with anyone who needs what I  
provide.*

*But...who should you WANT to talk to?*

What types of people (companies) have you worked with in the past?

Who have you had especially good success with?

Who made the buying decision?

What types of skills might they have on their profile?

What publications, blogs, influencers, etc. are they following?

## *What do we do with this information?*

Build LinkedIn Searches and Segment.

# Build Search(es)

## Years in current position

- Less than 1 year
- 1 to 2 years
- 3 to 5 years
- 6 to 10 years
- More than 10 years

## Company headcount

- Self-employed (22)
- 1-10 (168)
- 11-50 (289)
- 51-200 (451)
- 201-500 (440)
- 501-1000 (364)
- 1001-5000 (1,004)
- 5001-10,000 (477)

Industry

**Financial Services** ✕

Add industries

Banking (7.5K+)

Insurance (6K+)

Information Technology and Services (9...

Computer Software (38K+)

Internet (93K+)

Accounting (3.5K+)

Marketing and Advertising (300K+)

Investment Banking (587)

## Years in current position

- 1 to 2 years** ✕
- 3 to 5 years** ✕
- 6 to 10 years** ✕
- More than 10 years** ✕

Less than 1 year (20)

## Company headcount

- 1-10** ✕
- 11-50** ✕
- 201-500** ✕

Self-employed (6)

51-200 (118)

501-1000 (94)

1001-5000 (250)

5001-10,000 (154)

10,000+ (864)

# Build Search(es)

Aim for majority of results being good prospect fits and good volume.

Start broad...narrow down.

You won't get 100% of results being people you send a request to going overboard (reducing volume).



# Connect 365 Campaign Management Template

File Edit View Insert Format Data Tools Add-ons Help [All changes saved in Drive](#)



Share



100% | \$ % .0 .00 123 | Arial | 10 | **B** *I* A | | | | | |

	A	B	C	D	E	F	G	H
1			# Contacts Added	Date Added	(est) Last Message Date	Classification Tag	Status Tag	Next Step?
2	Campaign Name:					0		
3	Campaign Tag:							
4	Campaign Type:							
5	Length of Campaign:							
6								
7								
8								
9	<b>NOTE:</b>	<i>Click File -&gt; "Make a Copy" to get a version that you can edit.</i>						
10								

Add  more rows at bottom.

+ Template ▾ Example ▾ Example 2 ▾

Download at:

[Connect365.io/cm](https://Connect365.io/cm)

# Connection Request Script

Hey >>INSERT FIRST NAME<<,

I came across your profile here on LinkedIn and thought we could benefit from being connected.

Thanks!

>>INSERT YOUR NAME<<

>>YOUR TITLE<< (*group or company name*)

# Example

Hey Sarah,


I came across your profile and noticed we both have an interest in digital marketing. I thought we could benefit from being connected.

Hope business is going well!

Thanks,  
Josh Turner  
Founder, Small Biz Forum

# Referral Example

Send invitation ✕

 David Wagstaff · 2nd

Include a personal message (optional):

Hi David,

I'm reaching out because I'm building a referral network of other business owners in the St. Louis area, and I'd love to include you if you're interested in getting referrals.


Josh  
|

Save as lead

Cancel Send Invitation


# Why?

Invitations See all 24




**Ashley Wilson**  
Lead Generation · Market Research · Digital Marketing · Management Consulting ...  
👤 Molly McGinnis and 1 other


Ignore Accept



**Ashley Wilson**  
Intern at SEPROB



**Orlanthe Baker**  
Founder Real Estate Professionals Network (R.E.P.N.) | Real Estate ...  
👤 Jake Jorgovan and 4 others



**SCOTT BELL, DPM, DABF**  
📍 Phoenix, AZ  
👤 Meredith Eisenberg and 11 others  
1 month ago

Ignore Accept

Pat, ...

Looking forward to your 5-day challenge! Would also be honored to be added to your LinkedIn professional network!!

Dr. Scott See less

Reply to SCOTT

## Key Concept:

*Save this script in a notepad with the name fields left blank.*

# Assembly Line Checklist

1. Open (in new tab) 10-20 profiles that look like a good fit.
2. Click 'Connect' and 'Add Note' on each prospect's profile page.
3. Paste in Request script to all notes.
4. Edit to include First Name in all messages.
5. Send.



*A few thoughts on reviewing profiles...*

Prospect -> Lead -> Client

# Set Goal & Track

Instructions	<b>Prospect Value Calculator</b>			
<b>Step 1:</b> Click -> File -> Make a Copy to get your own editable version of this document. (note you can also Download as an Excel document if you prefer through 'File' -> 'Download')	Marketing & Sales KPI Calculator		<b>Monthly Prospecting Goal</b> (this will auto-calculate)	
<b>Step 2:</b> Fill in Cells E5 and E6 as best you can for your business. This will tell us how much revenue you'd expect to collect from the new client goal you've set for next year. <i>Note: This cell will auto-calculate based on your numbers above.</i>	---->	Goal for How Many New Clients you'd Like to Close This Year	6	Prospects You Must Add to Your List Each Month
		Average Lifetime Value of a New Client	\$40,000	50
	---->	Expected Total Revenue from Clients You Close Next Year:	\$240,000.00	
<b>Step 3:</b> Fill in E9 and E10 as best you can for your business. (if you aren't sure of your Conversion to Call %...use 10% as a starting point.) <i>Note: This cell will auto-calculate based on your numbers above.</i>		Closing Percentage (Booked Call -> New Client)	10%	
	---->	Conversion to Call (Prospect on List -> Booked Call)	10%	
<i>Note: This cell will auto-calculate based on your numbers above.</i>		Appointments Needed:	60	
<i>Note: This cell will auto-calculate based on your numbers above.</i>	---->	Prospects Needed:	600	
<i>Note: This cell will auto-calculate based on your numbers above and will tell you the estimated dollar amount each individual prospect you add to your list is worth to your business next year.</i>				
	---->	<b>\$ Value of Each Prospect ----&gt;</b>	<b>\$400.00</b>	
		<b>By Adding 20 New Prospects to My List I Should Generate ----&gt;</b>	<b>\$8,000.00</b>	
		<b>By Adding 50 New Prospects to My List I Should Generate ----&gt;</b>	<b>\$20,000.00</b>	

Download at:

[Connect365.io/pvc](https://connect365.io/pvc)

# Timeline

1. Send Requests
2. WAIT 24-48 hours - check acceptances
3. Add emails when you've reached goal

# Benchmarks

- <20-25% accepted within 48 hrs = Low
- 35% accepted within 48 hrs = Average
- 45%+ within 48 hrs = Great

# Email Gathering

When I'm ready to export...here's what I do.

# Step 1

The screenshot shows the LinkedIn Privacy settings page. The 'Privacy' tab is active. The main heading is 'Get a copy of your data'. Below it, there are two radio button options. The first option is 'Download larger data archive, including connections, contacts, account history, and information we infer about you based on your profile and activity. Learn more'. The second option is 'Want something in particular? Select the data files you're most interested in.' Under this second option, there are several checkboxes: 'Articles', 'Connections' (which is checked), 'Imported Contacts', 'Messages', 'Invitations', 'Profile', 'Recommendations', and 'Registration'. A red arrow points to the 'Connections' checkbox. At the bottom of the page, there is a blue button labeled 'Request archive' with a red arrow pointing to it. To the right of the button, it says 'Your download will be ready in about 10 mins'. Below the button, it says 'Don't see what you want? Visit our Help Center.'

Export Contacts from LinkedIn.

<https://www.linkedin.com/psettings/member-data>

## Step 2

34	John	Maxwell		24Option/ Business M	20-Aug-20
35	Kreil	Becky		Megafxstc Account M	20-Aug-20
36	Juan Rone	Rivera Roj	mcriverre	La Consult Director E	20-Aug-20
37	Phil	Mettra		Zorakle Pr VP of Clie	16-Jul-20
38	Alex	Fechner		The Adver Director C	9-Jul-20
39	Shay	Amin		MedXPrin Represent	9-Jul-20

Copy/Paste Contact Details into Your Tracking Sheet.

# Step 3



**Agency**  
ThefranchiseConsultingAgency.com  
There's A Franchise For That.

**FCA**  
A Subsidiary of *365*

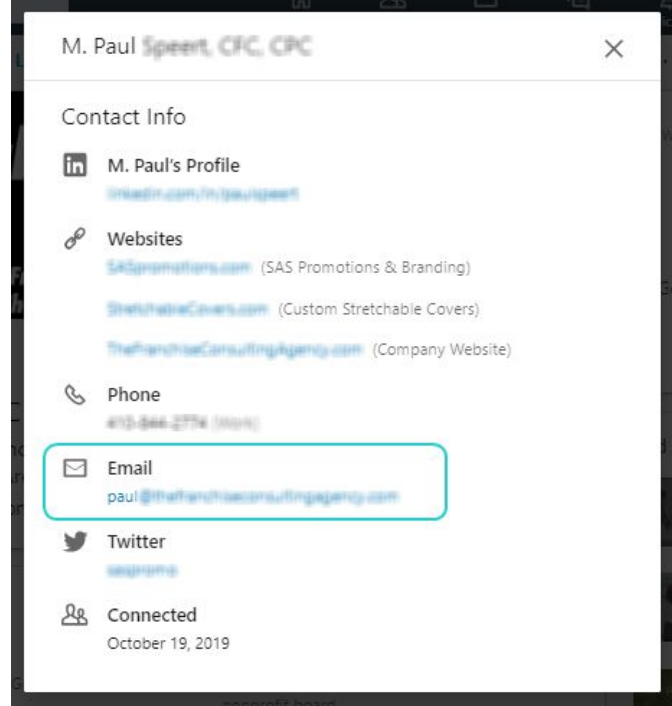
**There's A Franchise For That.**

Message View in Sales Navigator More...

M. Paul Speert, CFC, CPC · 1st in

I Can Help You Fire Your Boss And Start Your Own Successful Business Through Franchising. Are You Interested?

Baltimore, Maryland Area · 500+ connections · Contact info

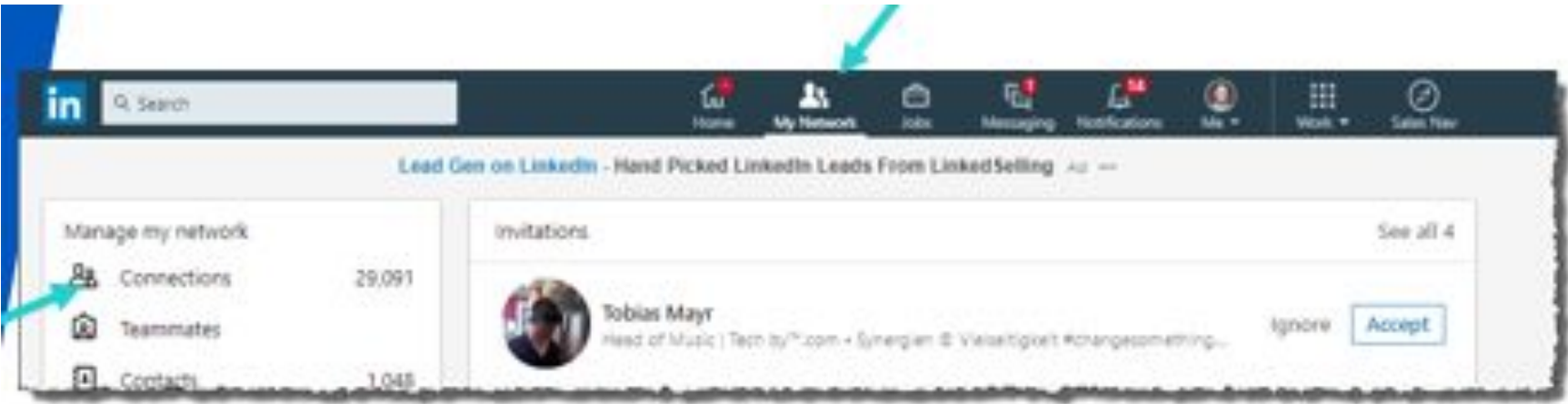


M. Paul Speert, CFC, CPC

Contact Info

- in M. Paul's Profile  
linkedin.com/in/paulspeert
- 🔗 Websites
  - SASpromotions.com (SAS Promotions & Branding)
  - StretchableCovers.com (Custom Stretchable Covers)
  - ThefranchiseConsultingAgency.com (Company Website)
- 📞 Phone  
410-966-2774 (Work)
- ✉️ Email  
paul@thefranchiseconsultingagency.com
- 🐦 Twitter  
speertm
- 👤 Connected  
October 19, 2019

Add Contact's email information to your Sheet.



## 29,091 Connections

Sort by: Recently added ▼

Search by name

Search with filters



**M. Paul**

I Can Help You Fire Your Boss And Start Your Own Successful Business Through Franchising. Are You Interested?  
Connected 19 hours ago

Message

...



**Alexa**

Chief Executive Officer at Lexi Marketing  
Connected 19 hours ago

Message

...



**Phil**

Founder at Diskette  
Connected 1 day ago

Message

...



**William**

I Help 6-7 Figure Companies Scale Strategically | \$34.2 Billion In Revenue Closed -->  
Ask Me How?  
Connected 1 day ago

Message

...



**Ayse**

Personal Development & Health Coach, Trainer | Helping UK SME executives & leaders 4 measurable stress & time management  
Connected 2 days ago

Message

...

### Manage synced and imported contacts

#### Add personal contacts

We'll periodically import and store your contacts to help you and others connect. You choose who to connect to and who to invite. [Learn more](#)

Your email address

Continue

More options

Josh Ready for your Dream Job with ADB Companies, Inc. <sup>Ad</sup> ...



**ADB**  
COMPANIES

Come explore our Keeley'n Culture.

Follow

# 6 Tips to More Efficient Prospecting

1. Define Prospect Profile.
2. Build Search(es).
3. Write Connection Request Script.
4. Assembly Line Process.
5. Set Goal & Track.
6. Email Gather in Bulk.

**Questions???**

On the next Mastermind:



# Outbound Sales Mastery

## Getting to a Decision

Call Held 6/2 at 1 pm (central)