

Selling Checklist

Products covered:

- Personal Profile
- LinkedIn Groups
- Sales Navigator
- Contacts

Create a profile that sells

- Getting Started
- Intermediate
- Advanced

☐ ● Polish your personal profile

As you reach out to leads and prospects, it's important to have a profile that speaks to your experience in and knowledge of the space. Add a professional photo, descriptive headline, and summary of your work experience to give potential customers a better understanding of who you are and what you do.

☐ ● Build your sales network

Broaden your network and increase the chances of finding the right decision maker through people you know by connecting with colleagues and partners on LinkedIn.

☐ ● Spotlight your offerings

Bring your company's business lines to life by uploading or linking to previous work and thought leadership pieces such as company blog posts, presentations, or websites.

☐ ● Let your network speak for you

A recommendation can go a long way in establishing your and your company's reputation. Get recommendations from partners and clients who can speak credibly about your abilities and your company's contribution to their business.

☐ ● Create your Company Page

The Company Page is foundational to building a brand on LinkedIn and acts as an information hub for your leads to learn about your company. It's easy to create one: just add a company logo, banner image, and description to get started. Link your personal profile to your page for easy access to these resources.

Stay informed

☐ ● Follow relevant channels and Influencers

Stay up to date on industry news and trends and speak with authority about your industry by following channels and Influencers.

☐ ● Follow competitor companies


Follow Company Pages to track how competitors are positioning their solutions. This will inform how you're differentiating what you have to offer.

☐ ● Find and join LinkedIn Groups


Join groups relating to your product or service and the industry you're targeting to understand what potential customers are talking about. You'll end up being better prepared to have a conversation with your customers about their business.

Find the right contacts


☐ ● Identify leads on LinkedIn

Find decision makers at your target accounts by running a people search on LinkedIn. Search by name, title, and company to generate a list of employees, and focus in on the right contacts with Premium search filters like seniority and years of experience. 

☐ ● Surface new prospects

Don't have a list of accounts to target? Build a pipeline of new prospects with a company search on LinkedIn using specific keywords and search filters for target companies. Access additional Premium search filters like seniority level and function with Lead Builder, and quickly identify decision makers to engage. 

☐ ● Get more context

With Sales Navigator, get a deeper look into a decision maker's LinkedIn profile to understand their relationship with the company and how they might influence a sale. 

Engage leads


☐ ● Find the best path in

After identifying decision maker profiles on LinkedIn, look within their network for mutual connections. These connections can be very influential when reaching out and making the sale.

☐ ● Get a warm introduction

After finding the best path in, leverage your network to get introduced through mutual connections. 

☐ ● Message leads outside your network

Message any lead on LinkedIn using InMail, a Premium-only feature. On average, the response rate on InMail messages is 3x higher than email. LinkedIn also guarantees a response within seven days of sending your InMail, or it's credited back to your account. 

Prepare for your meeting

☐ ● Establish credibility

Leading up to your meeting, establish your credibility by sharing relevant industry news and insights on LinkedIn.

☐ ● Activate your advocates

Social proof can make all the difference when trying to seal the deal. Flex your LinkedIn network and prompt mutual connections to give a recommendation on your Company Page or personal profile.

☐ ● **Continue the conversation**

Make a lasting impression after your meeting with a follow-up on LinkedIn. Invite them to connect or share industry news.

☐ ● **Schedule your follow-up**

Reaching out consistently after an initial meeting can make all the difference in converting a lead to an account. Use LinkedIn Contacts to set reminders for following up, which can be accessed by clicking the star icon below a contact's profile picture.