



SALES RESEARCH GUIDE TM

How to conduct sales research using LinkedIn,
Google Alerts, and Google Search

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Purpose of the Guide

The purpose of this guide is to show you how to conduct sales research using LinkedIn, Google Alerts, and Google Search, whether you are prospecting for new business or further developing current clients.

This guide:

- Supports multiple training programs, and as such, you may be asked to read only certain portions of the guide for a program that you are about to attend. In that case, you may read and use the remainder of the guide at your leisure.
- Gives you tips, ideas, and examples for using LinkedIn to find, research, connect, and communicate with prospects and clients
- Introduces the basics of Google Search and Google Alerts. You'll learn how to set search parameters and how to set up a Google Alert. You'll also see examples of how Google Alerts can be used for sales research.

Consider this guide as a starting point. It will give practical knowledge for you to apply to your selling efforts. It will also provide additional resources and links for you to explore for continued learning.



Overview

The Power of LinkedIn

Through LinkedIn, you can build your network, find prospects, and learn about those prospects and your current clients by researching them further. You can also connect and communicate effectively with both.

In the long term, LinkedIn can be used as a powerful business tool to generate new sales opportunities and deepen penetration into existing accounts. However, when done appropriately and effectively, this process takes time.

LinkedIn should not be used as a vehicle to sell directly to strangers! It is a networking platform that is meant to give professionals an opportunity to connect with others and build relationships.

LinkedIn markets itself as a means to:

- Establish your professional profile and control one of the top search results for your name
- Build and maintain a broader network of professionals you can trust
- Find and reconnect with colleagues and classmates
- Learn about other companies
- Leverage powerful tools to find and reach the people you need
- Tap into the knowledge of your network
- Discover new opportunities

Overview

The LinkedIn portion of this guide will help you:

- Recognize the importance of building and leveraging your network
- Research prospects and clients (individuals and companies) and uncover insights about them
- Create a personal approach to connect and communicate with network acquaintances and contacts
- Use LinkedIn efficiently to meet your personal and business needs



Note: To learn more about the value of LinkedIn, visit <http://bit.ly/ValueOfLinkedIn>.

The Point of Social Networking

LinkedIn is a social networking tool. Communicating on LinkedIn is similar to face-to-face networking, at least in the tone and approach you take.

Here's an example: When you meet at a networking event, the way you speak to that person and approach them is similar to how you approach someone on LinkedIn. You exchange names and talk about what you do and who you work for. You may discuss common interests, similar people you know, best practices, etc. If you have enough in common and want to stay in touch, you'll exchange business cards. You may or may not stay in touch. If you do, perhaps you'll exchange e-mails and with the obligatory, "It was great to meet you. Let's stay in touch." Perhaps you will have lunch someday. It takes time to grow the relationship.

Growing relationships is similar on LinkedIn. It takes time and sincerity. You should use a similar tone and approach as to what you would use when meeting people at a face-to-face networking event. You are getting to know each other, so the tone should be casual instead of direct and pushy.

You wouldn't be pushy and overwhelm a person you just met at a networking event by saying, "I sell widgets, DO YOU WANT TO BUY NOW?" And you shouldn't do that on LinkedIn.

If you remember that the point of LinkedIn is **networking** and building your network connections, then LinkedIn will work more effectively for you. This will lead you to your ultimate goal of connecting with contacts and generating new sales opportunities.

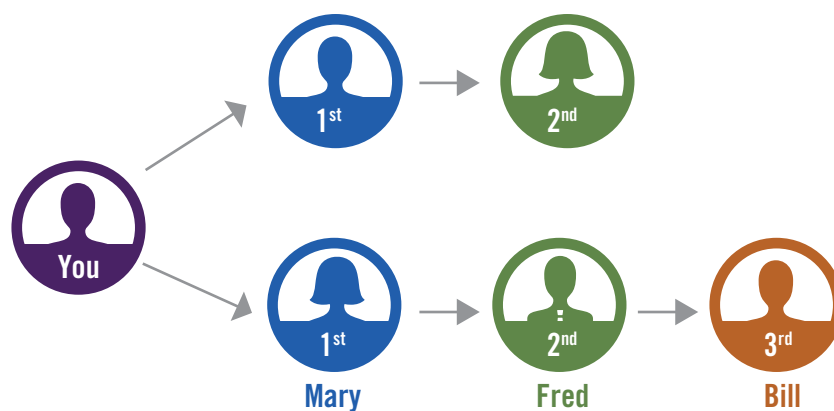
In other words, LinkedIn is a networking tool. It's **social networking**. It's not a direct selling tool. Yet, it can help you reach your contacts. But, it must be done in a purposeful, polite, and civilized manner!

Levels of Connections on LinkedIn

As you network with people, they will hopefully get to know you, like you, and trust you. Then, they will be willing to connect with you on LinkedIn, where there are millions of "connections," or members.

There are different levels of connections. The people you connect with directly are your first-level connections. As you see in the graphic below, Mary would be one of your first-level connections. She is connected to Fred, so Fred is your second-level connection. Fred is connected to Bill. Bill is your third-level connection.

If you are prospecting and you wanted to meet Bill, Mary and Fred could facilitate an introduction.



Without LinkedIn, you may not be aware that you were connected to Fred, who might be a viable prospect. LinkedIn provides a plethora of potential contacts and shows a path to make it easier to get connected.

Overview

Your **Activity** section on LinkedIn shows how many people you can potentially reach. You are connected to your connections, and their connections, and their connections!

In this example, if you have 1,010 connections, then with your first-, second-, and third-level connections, you have the capacity to reach over 10,308,648 people on LinkedIn.

YOUR LINKEDIN NETWORK

1,010 Connections link you to 10,308,648+ professionals

29,743 New people in your Network since May 23



As you can see, the more connections you have in your network, the easier it is to get connected and introduced to **your** contact! We will talk about building your connection and introductions later. First, let's talk about how to pinpoint and find ideal contacts on LinkedIn.

Finding Prospects

Building an Ideal Prospect Profile

As you know, your strategy is to create and replicate your best opportunities, improve your selling efficiency, improve your win rate, and generate more profitable business for yourself and your company.

LinkedIn provides several powerful tools that will enable you to pinpoint your search for contacts. These tools, LinkedIn's Advanced Search feature, "People Similar To," and "Groups" allow you to zero in on key information that is relevant to your ideal profile.



Pinpointing Key Information

After identifying or developing your target contact profile, use this key information to your advantage, and plug in the data you have collected to narrow your search efforts on LinkedIn. You can search across your connections' community and produce pages of relevant people matched to your profile. Based on whether you have a free or paid subscription, you can search by keyword, name, title, position, school, company name, company size, industry, years of experience, location, groups, and interests. In the free version of LinkedIn, you can search by:

- Keyword
- First name
- Last name
- Location
- Current or past title
- Company
- School
- Industry
- Relationship
- Language

Finding Prospects

Using Advanced People Search

LinkedIn's Advanced People Search feature is a powerful tool. It is especially helpful for finding clients, business partners, and potential buyers who fit your Ideal Prospect Profile.

To find people with the Advanced People Search:

1. Locate the **Search box** on the LinkedIn tool bar (in the upper-right corner).
2. Click **Advanced**.



3. The **Advanced People Search** form appears.

A screenshot of the LinkedIn Advanced People Search form. The form is titled "Advanced People Search" and has a "Reset" and "Close" link in the top right corner. The form is divided into several sections: "Keywords" (with a text input field), "First Name" (with a text input field), "Last Name" (with a text input field), "Title" (with a text input field), "Company" (with a text input field), "School" (with a text input field), "Location" (with a dropdown menu for "Located in or near:" and a "Country" dropdown menu set to "United States"), and "Postal Code" (with a text input field and a "Lookup" button). The "Relationship" section has three checkboxes: "1st Connections" (checked), "2nd Connections" (checked), and "3rd + Everyone Else" (unchecked). The "Current Company", "Industry", "Past Company", "School", and "Profile Language" sections each have a text input field. The "Groups" section has a list of groups with checkboxes: "Art Director's Club of Philadelphia (ADCP)", "East Coast Action Sports Association", "Philadelphia Area New Media Association (...)", "Philadelphia Interactive Marketing Association", and "Small Biz Nation". The "Years of Experience", "Function", "Seniority Level", "Interested In", "Company Size", "Fortune", and "When Joined" sections each have a dropdown menu.

4. Fill in the **Advanced People Search** form with your ideal criteria from your Ideal Prospect Profile. In the free version, you may get the best results through the Keywords, Title, Name, Company, Industry, and Groups fields, but that will depend on who and what you are searching for.

5. Once complete, click the blue **Search** button.

The screenshot shows the LinkedIn 'Advanced People Search' interface. On the left, there is a sidebar with a 'Search' button highlighted by a red box. The main search area is titled 'Advanced People Search' and includes a 'Reset' and 'Close' link in the top right corner. The search criteria are organized into several sections: 'Relationship' (with checkboxes for 1st Connections, 2nd Connections, Group Members, and 3rd + Everyone Else), 'Location' (with a dropdown for 'Located in or near'), 'Current Company', 'Industry', 'Past Company', 'School', and 'Profile Language'. On the right side, there are several filter categories, each with a dropdown menu: 'Groups' (with options like Art Director's Club of Philadelphia (ADCP), East Coast Action Sports Association, Philadelphia Area New Media Association, Philadelphia Interactive Marketing Association, and Small Biz Nation), 'Years of Experience', 'Function', 'Seniority Level', 'Interested In', 'Company Size', 'Fortune', and 'When Joined'.

6. Your results page shows a list of matches.
7. Identify the connections you wish to pursue so you can research them further on LinkedIn (and by other means) to uncover insights and plan an effective selling approach.



Using Advanced People Search — An Example

Here's an example of an Ideal Prospect Profile and a completed **Advanced People Search** form.

Eric Smith is a sales executive at Genicon, a medical device company. Eric wants to locate contacts on LinkedIn who fit his Ideal Prospect Profile. Eric works in the Chicago area and is charged with finding contacts in the Chicago metro area. He is looking for hospitals and departments within hospitals that perform cardiovascular procedures. The titles and roles of many of his current clients include Head of Cardiovascular Surgery and Head of Hospital Administration. The industry he is targeting is Hospital & Health Care.

Finding Prospects

Based on Genicon's best current clients, Eric has identified his ideal contact and has input the information he has gathered into his **Advanced People Search** form:

The screenshot shows the LinkedIn 'Advanced People Search' interface. On the left, under the 'People' tab, there are several input fields: 'Keywords' (containing 'cardiovascular, surgery'), 'First Name', 'Last Name', 'Title' (containing 'Director of Cardiothoracic'), 'Company', 'School', 'Location' (set to 'Located in or near:'), 'Country' (set to 'United States'), 'Postal Code' (containing '60607' with a 'Lookup' button), and 'Within' (set to '50 mi (80 km)'). A blue 'Search' button and a 'Reset' link are at the bottom. On the right, the 'Advanced People Search' panel has several sections: 'Relationship' (with '1st Connections', '2nd Connections', and 'Group Members' checked), 'Location', 'Current Company', 'Industry' (with 'Hospital & Health Care' checked), 'Past Company', 'School', and 'Profile Language'. Purple boxes highlight the 'Keywords', 'Title', 'Postal Code', and 'Hospital & Health Care' fields, with lines connecting them to the text above.



Note: To learn more about Advanced Search, visit <http://bit.ly/LIHelp-AdvancedPeopleSearch>.

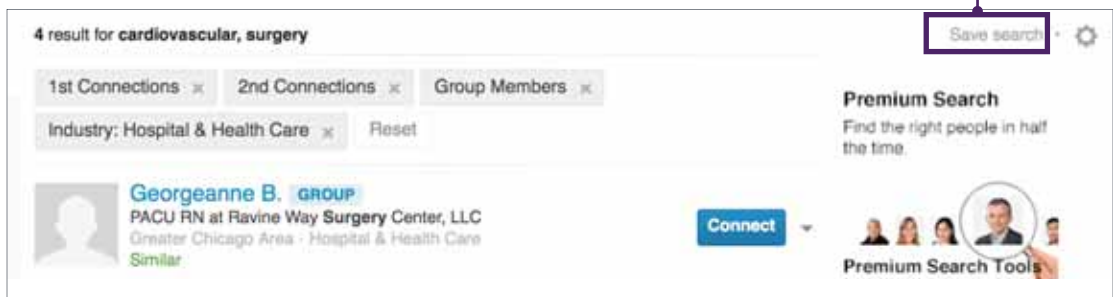
Using Saved Searches

The “Saved Searches” feature (Advanced Search) lets you save the search criteria you entered so you don’t have to recreate your list each time you open LinkedIn. Saving your list helps you manage it.

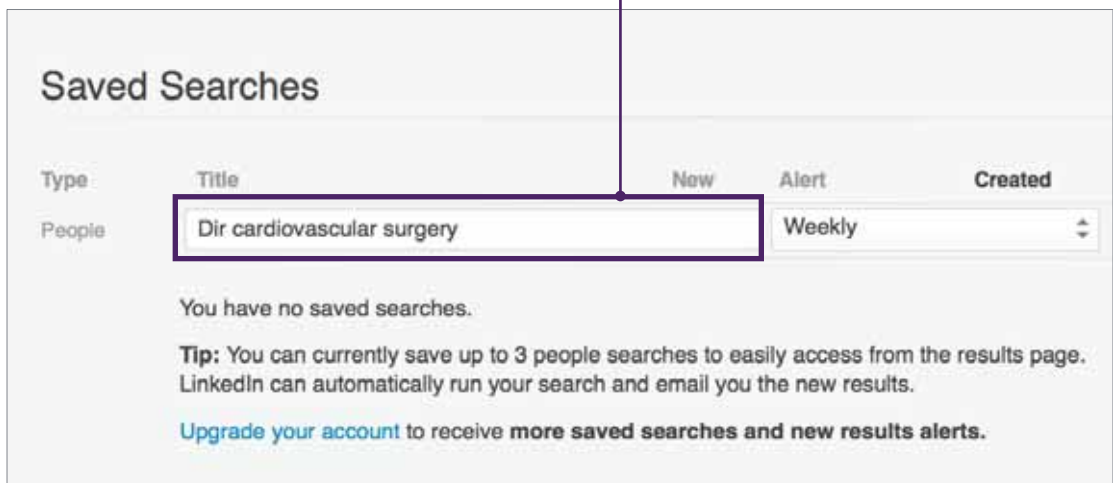
The type of account you have will limit the number of saved searches that you can have. A free account lets you save three lists.

To save the list:

1. Click the **Save Search** button.



2. Type in a name for your search.



3. Choose how often you’d like to receive an e-mail alert with new results.
4. Click **Save**.

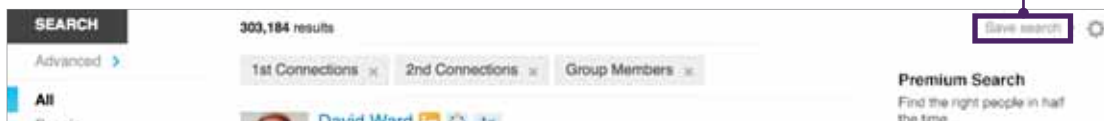
Finding Prospects

When you later sign into LinkedIn to continue working on your list:

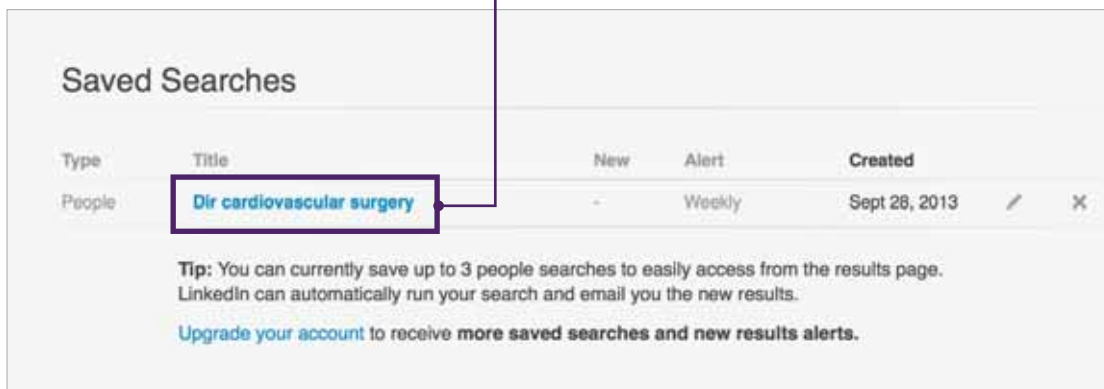
1. Open the Advanced People Search window.
2. Click **Advanced**.



3. Click **Save Search** (in the upper right part of your results page). This causes your saved searches to appear.



4. Click the list you want to work with.

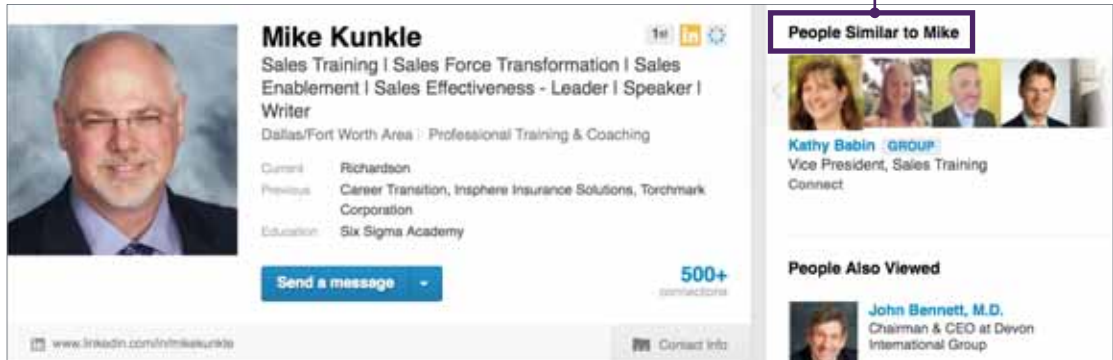


Note: To learn more about Saved Searches, visit <http://bit.ly/LIHelp-SavingAPeopleSearch>.

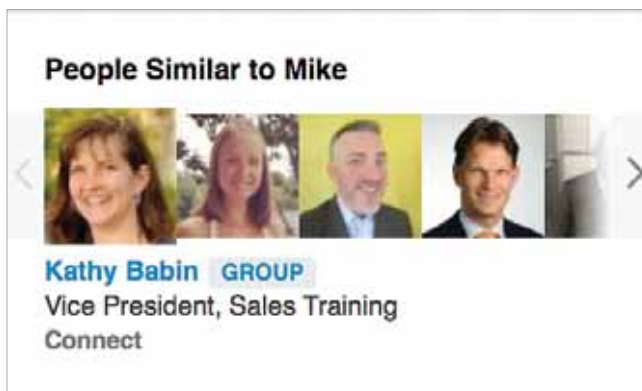
Using the “People Similar to” Feature

The opportunity to build your network is at your fingertips through LinkedIn’s “People Similar To” feature. LinkedIn automatically searches across its extensive database, seeking traits and information in your current connections, and displays those who are similar to them, putting a pot of gold within arm’s reach — which is another easy way to identify potential prospects.

After finding a contact, look to the right side of their LinkedIn profile for a section called **“People Similar to (connection’s name).”**



1. To view a similar person’s profile, click the photo of the person you want to explore.



2. Click your browser’s back arrow to view the other “People Similar to (connection’s name).”

Using the “People Also Viewed” feature

In addition to the “**People Similar to**” feature, there is a “**People Also Viewed**” section, located below it. Scroll down to locate it. This section shows a list of profiles that other LinkedIn users viewed before or after visiting the profile you are currently viewing.

This feature is helpful to find more similar connections and to guide your search. Simply click the profiles you want to explore.

People Also Viewed



Dario Priolo
Chief Strategy Officer at Richardson



David DiStefano
President and CEO, The Richardson Company



Mark Hunter
The Sales Hunter / Keynote Sales Speaker / Sales Consultant / Pricing Consultant



Jill Konrath
Intergalactically recognized sales expert, top-notch speaker, author of SNAP Selling & Selling to Big Companies



Debi Collins
Director of Sales Training and Development at Logi Analytics



Michael Pedone
SalesBuzz.com - "Because Sales People Don't Want to Be Trained, They Want to Be Better!"



Rick Dassler
Moving Sales Leaders to Lead in the Best Practices of Sales and Business Management

Farming within Current Accounts

Be sure to connect with your current clients on LinkedIn. Once you are connected to your clients, you can farm within their network connections to reach other people who fit your profile.

This gives you the opportunity to identify contacts you may not be aware of in other divisions or departments inside your current client accounts. Current client contacts can be key facilitators; they hold the power to introduce you to other people who you would not be connected to otherwise.



Farming with Current Accounts: Example

Maria Koba is a first-level connection, who works at Hay Group.

Click her **Connections**.

Maria Koba
Director, Corporate Finance IT at Hay Group Management Inc.
Greater Philadelphia Area | Management Consulting
Previous Hay Group, Penn Treaty Life Insurance, Peterson Consulting
Education La Salle University - School of Business Administration

179 connections

It shows all connections and shared connections. She has 179 connections in total, and you share 15 common connections.

CONNECTIONS

All (179) Shared (15)

Jeff Meyers 1st Marketing and communications consulta...	Daniel T Gramkee 2nd AMger, Fitness Pro, Freelance Photogra... Connect · 10
Steve Leone 1st Information Technology and Services Pr...	Betsy Scarcelli 2nd VP Strategic Planning, AmeriHealth Mer... Connect · 3
Yvonne Cook , 2nd BusinessTechnology Executive Connect · 2	Rosemary Fulton 2nd IT Leader, Business Partner, & PMP Connect · 1

Finding Prospects

Use the search box in the right corner to find other potential contacts at the Hay Group. Simply type **Hay Group** and press **Enter**. This displays a list of people who work at the Hay Group at present and who have worked there in the past. If you have a strong relationship with Maria, you can ask her if she would facilitate an introduction to her connection.

The screenshot shows a LinkedIn 'CONNECTIONS' page with a search box in the top right corner containing 'Hay Group'. Below the search box, there are two tabs: 'All (179)' and 'Shared (15)'. The search results are displayed in two columns. The first column lists: David Harkleroad (1st degree, Global CMO | COO | B2B Marketing | Stra...), Felipe Garcia (2nd degree, Chief Technology Officer, Connect 8), Scott Nicely (2nd degree, Manager of Information Technology, Su..., Connect 8), Fran Johnston (1st degree, Founder, Teleos Leadership Institute), and Dario Priolo (YOU, Chief Strategy Officer at Richardson). The second column lists: Ian B. Wilcox (1st degree, Global Life Sciences Industry Consultant), Sandy Lamorgese (2nd degree, Telecom & Database Administrator & Fa..., Connect 28), Randal Goodman (2nd degree, Results-Oriented Management Consulta..., Connect 5), Bill Agostini (2nd degree, Director at Klarifi Human Capital Manage..., Connect 36), and Sari Steuber (2nd degree, Program Manager at Hay Group). A red line connects the search box to the 'Felipe Garcia' profile.



Note: To learn more about searching your connection's connections, visit <http://bit.ly/LIHelp-SearchConnections>.

Farming within LinkedIn Companies and Groups

You can use LinkedIn to identify companies to target and to find the best groups that make sense for your unique background and specialized expertise.

When you know what types of companies make sense as your prime contacts, you can pinpoint them on LinkedIn. You can also find the most active groups to meet your specific needs.

You can even take your selling efforts further by finding people within those target companies and groups. You'll be able to uncover interesting insights as you pursue these contacts.



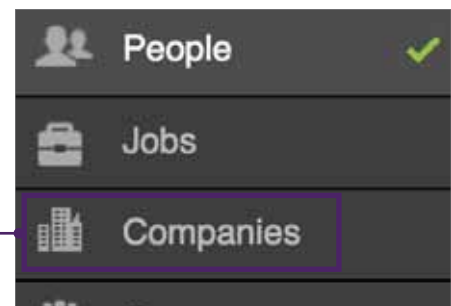
Farming within LinkedIn Companies and Groups: Example

Teresa Alvarez is an account rep at Flair, an enterprise management company. Teresa just landed Open Text as a client and completed a successful implementation, so she wants to pinpoint prospects on LinkedIn in her area of expertise. She went to Open Text's LinkedIn page and explored their Insights tab.

She found a multitude of people to network with, uncovered many insights from talking to them, and identified other companies to target. She found several LinkedIn Groups to join and is now participating in discussions with thought leaders in the enterprise management field.

Here's how you can farm within LinkedIn Companies and Groups:

1. In the LinkedIn tool bar, click the **down arrow** (next to the People symbol).
2. Click **Companies**.

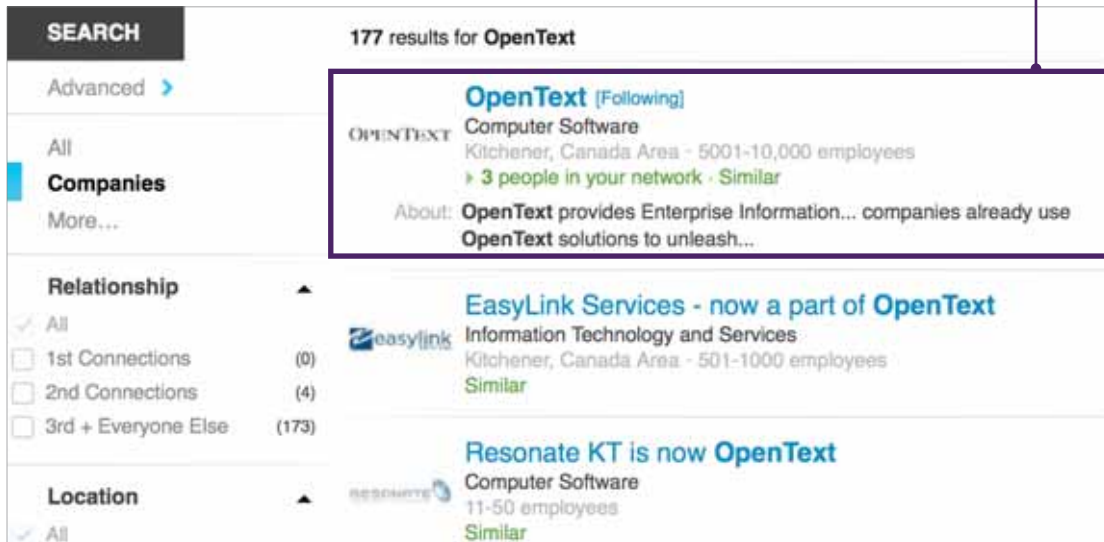


Finding Prospects

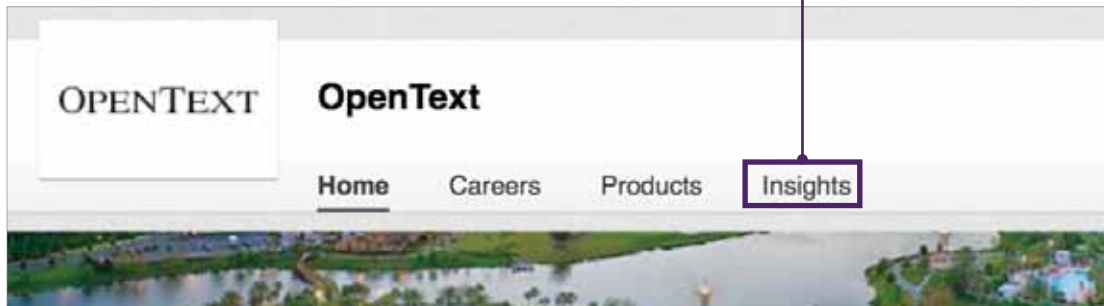
3. Type your target company name (“Open Text” in our example) in the search box, and click the **search** button (blue magnifying glass).



4. When the results are displayed, click the target company’s home page.



5. When their home page appears, click **Insights**.



Once you are inside **Insights**, you will see the **Where Employees Came From** section on the right side. This provides you with other companies to target.



6. Scroll down to **Top Skills & Expertise**.
7. Click your area of expertise (for example, “Enterprise Content Management”).
8. Explore this specialty area of your skills and expertise.
9. Review profiles of professionals listed under your specialty. Explore additional related companies.

Top Skills & Expertise

- Livelihood (21198)
- Enterprise Content Management (116067)**
- Hummingbird (2942)
- Vignette (11789)
- EIM (14422)

Enterprise Content Management

▼-1% y/y

Primary Industry: Information Technology and Services

Enterprise content management (ECM) is a formalized means of organizing and storing an organization's documents, and other content, that relate to the organization's processes. The term encompasses strategies, methods, and tools used throughout the lifecycle of the content.

[More on 'Enterprise Content Management' at Wikipedia »](#)

Add Skill
Edit Your Skills

Related Companies

OpenText
Computer Software, Kitchener, Canada Area
[Stop following](#)

Hyland Software
Computer Software, Cleveland/Akron, Ohio Area
[Follow](#)

Perceptive Software
Computer Software, Kansas City, Missouri Area
[Follow](#)

EMC
Information Technology and Services, Greater Boston Area
[Follow](#)

Kofax
Computer Software, Orange County, California Area
[Follow](#)

[More companies...](#)

Enterprise Content Management Professionals

Lubor Ptacek (3rd)
VP, Strategic Marketing at OpenText
Lubor Ptacek joined OpenText in 2008 and his current role is Vice President of Strategic Marketing where he is...

Andrew Connell (3rd)
Entrepreneur, Consultant, Author & Microsoft MVP SharePoint Server
Andrew Connell is an independent consultant that enjoys development, writing & teaching. He has a background in...

Peter Near (3rd)
Director, Solution Consulting (Pre-Sales Engineering) at OpenText

Jeff Potts (3rd)
Chief Community Officer at Alfresco
Over the years I've managed consulting practices of varying sizes from 4 to over 20. They've had different names...

Lynn Elwood (3rd)
Vice President, ECM Product Marketing at OpenText

Related Locations

Westlake, Cuyahoga

Saint David, Cochise

London, Greater London

Calgary, Alberta

Waterloo, Ontario

* Based on LinkedIn data

[More locations...](#)

10. Scroll down to see LinkedIn Groups that are specific to your specialty.

Finding Prospects

11. Join a few groups that suit your needs.

Enterprise Content Management Groups

	AIIM Global Community of Information Professionals AIIM is the global community of information professionals. We provide the education, research and certification that information... 21,817 members	Join
	Content Management Professionals CM Pros is a collaborative community of practice advancing the field of content management. Its members reflect the cross-disciplinary... 26,448 members	Join
	ECM BPM ACM Dematerialization You will find here all poeple concerned by ECM, BPM, IDM workflow, GED, IBM FileNet, ACM, Case Management, EMC Documentum, Global 360,... 7,766 members	Join

12. Participate in discussions.

13. Connect with people on LinkedIn, and build your network.

14. Continue to read the **Insights** page and uncover information.

15. Gather insights, and continue to prospect.

You can send messages directly to members if you join groups that they belong to. We cover more about that in the section about groups.

Researching Prospects and Clients

LinkedIn has a multitude of information and resources to help you research companies and people as you build your network and identify contacts.

This section of the guide can help you identify which groups to join and what companies to follow. By doing that, you will gain insights into your contacts' businesses and will make effective use of your time on LinkedIn.

Identifying Groups Your Contacts Belong To

You can gather important insights from the groups that your contacts belong to. You can learn a great deal of inside information about contacts, such as interests, charitable activities they are involved in, events they attend, research they are conducting, and exclusive achievement-based societies they have been inducted into. You can also get an idea about their professional opinions if you follow what they say in the discussion groups. Group membership on LinkedIn resonates highly with individuals and can be used to your advantage as you look to target their buying influences appropriately.

To identify the groups a contact belongs to:

1. Go to a prospective client's profile.

The screenshot shows a LinkedIn profile for Dario Priolo. On the left is a profile picture of a man with glasses. To the right of the picture, the name 'Dario Priolo' is displayed in bold, followed by his title 'Chief Strategy Officer at Richardson' and location 'Greater Philadelphia Area'. Below this, it lists 'Professional Training & Coaching' as a skill. Further down, it shows 'Previous' roles at 'Profiles International, Sales Training Direct, Miller Heiman' and 'Education' at 'Wharton School, University of Pennsylvania'. A blue button says 'Send a message' and a badge indicates '500+ connections'. At the bottom left of the profile, there is an 'Activity' section with a post from 'Dario Priolo via twitterfeed'. On the right side of the profile, there is a 'People Also Viewed' section listing five other professionals with their names and titles: David DiStefano (President and CEO, The Richardson Company), Jim Brodo (SVP, Marketing at Richardson), Mike Kunkle (Sales Training | Sales Force Transformation | Sales Enablement | Sales Effectiveness - Leader | Speaker | Writer), Harry Dunklin (SVP, Sales Readiness at Richardson), and Andrea Grodnitzky (Senior Vice President, Global).

Researching Prospects and Clients

2. Scroll down his or her profile until you see a section labeled “Groups.”

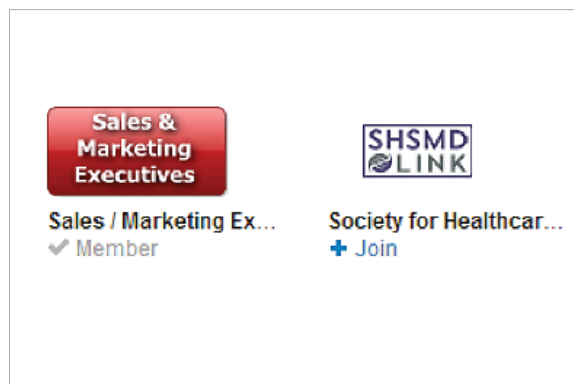


3. If there are more groups other than the ones listed on the home page of the client's profile, click **See more**.



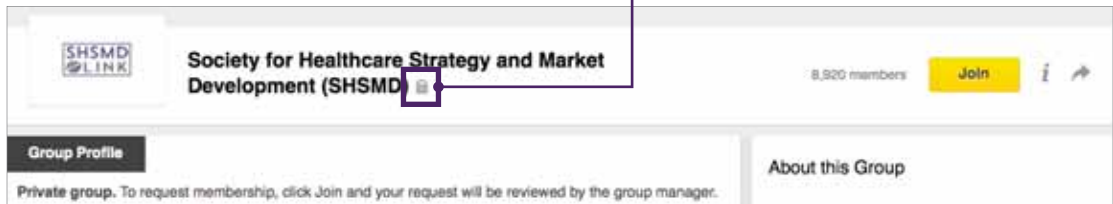
Group logos are displayed and provide helpful information about a client's relationship with groups.

A check mark under the logo indicates that this person is a member of that group; a plus sign indicates that this person can join that group.



Researching Prospects and Clients

Some groups are displayed as open or closed. If they are closed, when you click the group logo, a padlock appears next to their name.

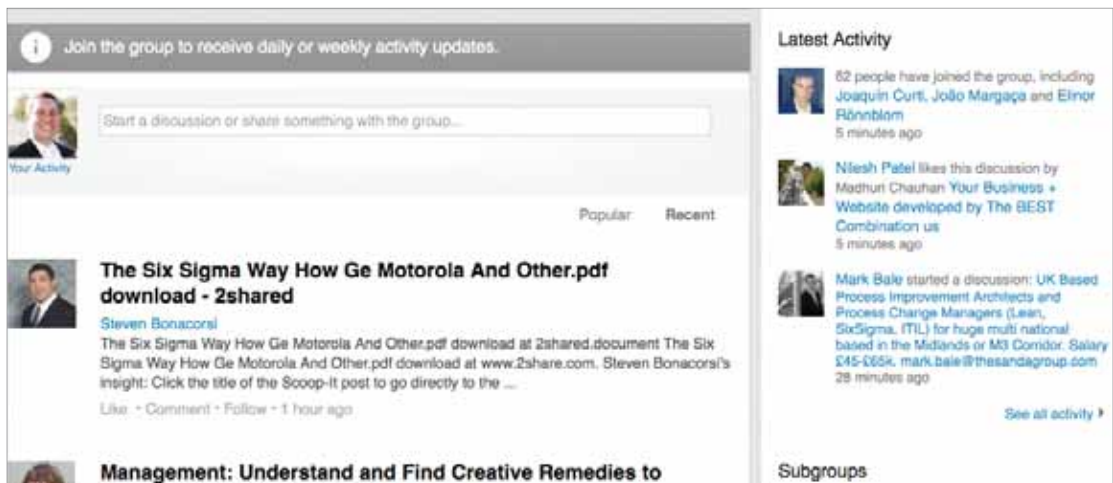


To view group discussions and see what your contact might be saying in the group discussion, you can join and be approved as a member. You can belong to up to 50 groups with the free/basic LinkedIn membership.

Once you are a member of a group, you can not only view the discussion but can also participate.

Consistent and regular participation allows you to get to know members. It also establishes you as a member of the community and expert in your field. This helps you develop credibility over time. When you make contact, he or she might recognize your name (if they viewed your posts), which might make him or her more receptive to talking to you.

Anyone may view the discussions in open groups. If you click the logo for an open group, this page will appear showing the **Discussions**. (The padlock symbol appears on closed groups, and discussions may not be viewed.)



Researching Prospects and Clients

If the group is open, you cannot comment on discussions; however, you can “like” the group, follow the group, and more. You cannot start a discussion if you do not join the group.

Popular Recent

The Six Sigma Way How Ge Motorola And Other.pdf download - 2shared

Steven Bonacorsi

The Six Sigma Way How Ge Motorola And Other.pdf download at 2shared.document The Six Sigma Way How Ge Motorola And Other.pdf download at www.2share.com. Steven Bonacorsi's Insight: Click the title of the Scoop-It post to go directly to the ...

Like • Comment • Follow 2 hours ago

Add a Comment...

Send me an email for each new comment. [Comment](#)

Management: Understand and Find Creative Remedies to Overwork <http://ow.ly/pdg4a>

Alena Peacock

Like • Comment • Follow • 2 hours ago

Joining Local and Industry Groups

It's important to network with professionals in your field, both in your industry and locally.

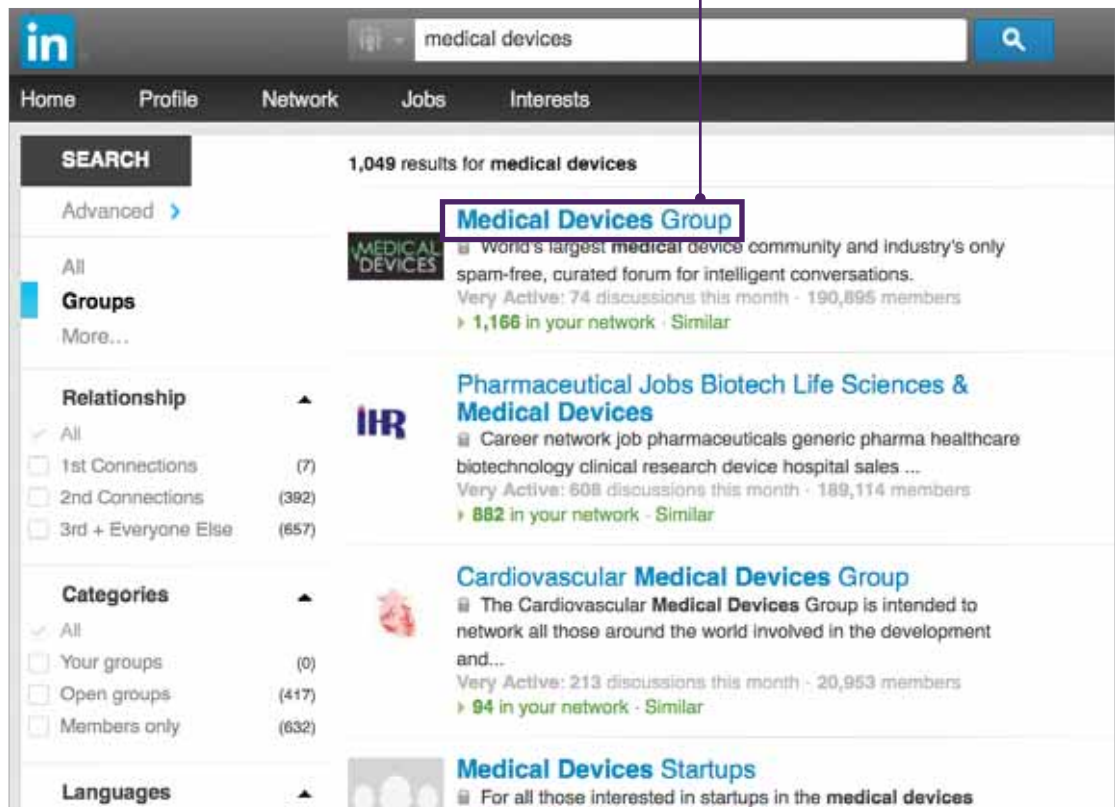
Sales reps should consider industry groups that they specialize in, such as their client's industry, as well as groups that specialize in sales expertise.

To find groups to join:

1. Click the **Groups** symbol on the left side of the search box.
2. In the search box, type the topics of groups you are searching for (For example, "medical devices").
3. Click the blue **search** button (the magnifying glass).

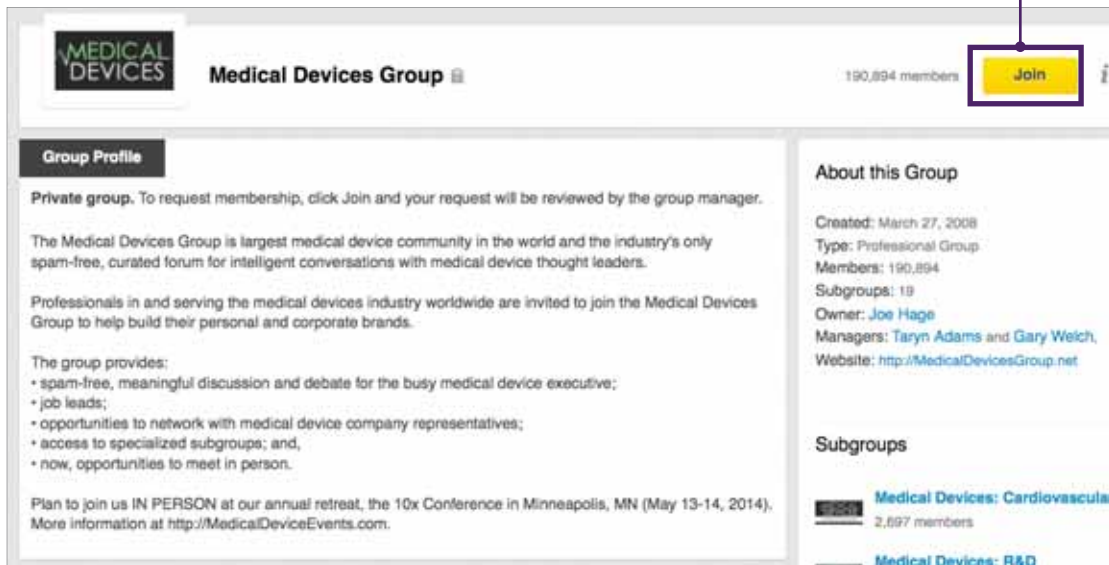


4. Click on the group name you want to join.



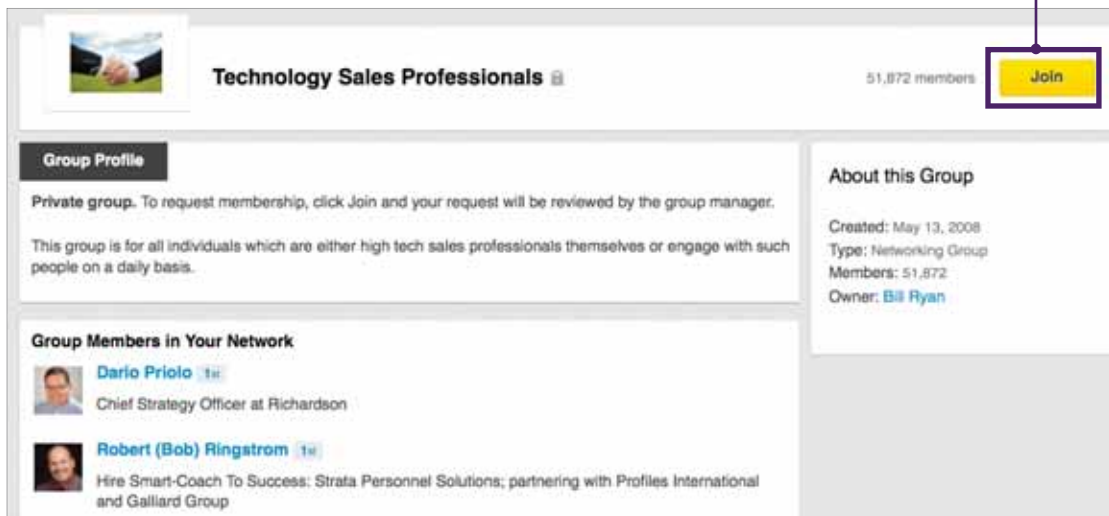
Researching Prospects and Clients

5. Click join.



It's important to join local groups in your own geographic area. This is especially helpful if you sell locally. Even if you don't have local clients, it's always nice to have local professionals to network with and to be able to meet with face-to-face to brainstorm with and to share ideas and best practices with.

Lastly, you may want to join LinkedIn groups that cater to sales professionals. Here, you can share selling tips and ideas.



Capitalizing on Your Success: Find Followers

You can capitalize on your best clients. Identify clients who have had success with your company, and follow them on LinkedIn.

First, identify a client who has a solid success story with your company's service.

1. On your LinkedIn home page, go to the main search window.



2. Click the down arrow to the right of the people search symbol.

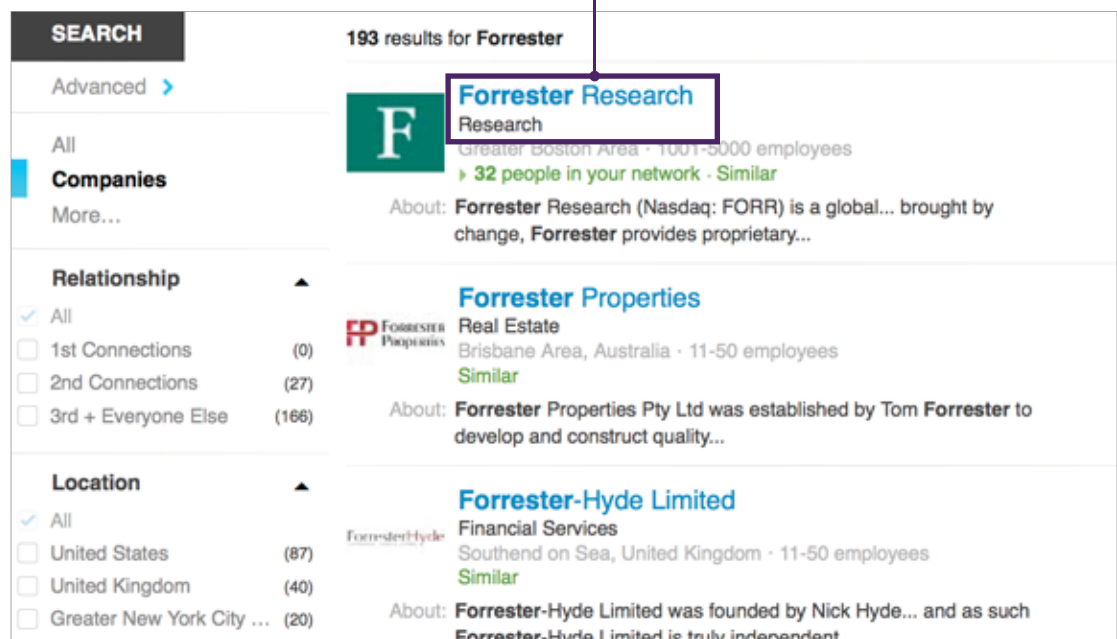
3. Click **Companies** from the search type list.

4. Type the company name you are searching for.



5. Click the blue **search** button (the magnifying glass).

6. When the results are listed, click the company you want to look at.



The screenshot shows the LinkedIn search results page for 'Forrester'. On the left, there is a sidebar with filters: 'SEARCH' (Advanced >), 'All Companies' (More...), 'Relationship' (All, 1st Connections (0), 2nd Connections (27), 3rd + Everyone Else (166)), and 'Location' (All, United States (87), United Kingdom (40), Greater New York City ... (20)). The main content area shows '193 results for Forrester'. The top result is 'Forrester Research', which is highlighted with a purple box and a line pointing to step 6. Below it are 'Forrester Properties' and 'Forrester-Hyde Limited'. Each result includes a logo, company name, industry, location, employee count, and a brief description.

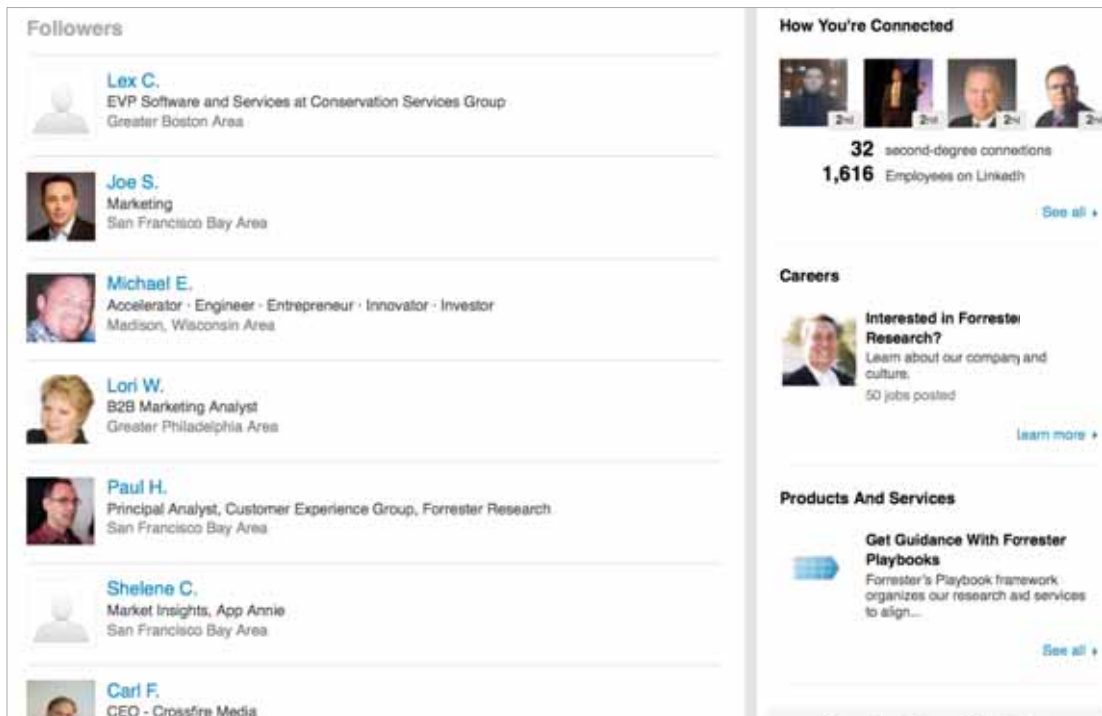
Researching Prospects and Clients

7. Click on their followers.



These people will most likely be receptive to a message that includes a success story featuring that client. Typically, followers of a company are either direct competitors, other companies with the same target audience, vendors, or partners. All of these make good prospects for you.

The left side of the window shows individual followers of this company. You can click and see their LinkedIn profiles, as shown on the right. LinkedIn indicates **How You're Connected** to the people who also follow this company. This makes it easier to connect and network with Followers!



Following Your Prospects' Company and Your Clients' Companies

Remain up to date with your contact's company. To do so, follow your contact's company on LinkedIn. Be on the lookout for key company updates, such as awards or honors, public recognition, new product launches, etc.

Having access to company information can be critical in nurturing a budding relationship. It provides insights and trigger events that may signal an opportune time for you to reach out to your contact.

Following your contact's company adds to your business intelligence and creates information and insights for personalized communication.

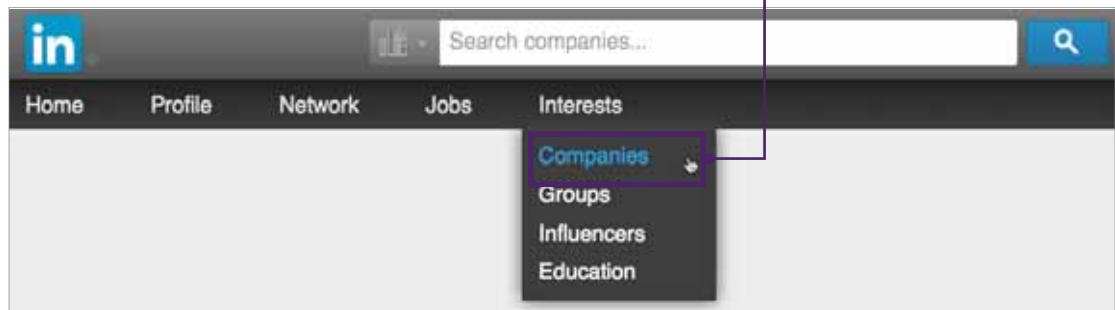
To follow your contact's company:

1. Go to the contact's profile, and find the company your contact works for.
2. Search LinkedIn for that company.
3. Click the company of your choice, and then, click the yellow **Follow** button in the upper-right corner.



You can read about the companies you follow in your updates. To do this, go to the main page.

- Move your mouse pointer over **Interests**, and click **Companies** from the drop-down list.



Researching Prospects and Clients

Your **Followed Company Updates** appear.

The screenshot shows a LinkedIn 'Following' page. At the top, there are navigation links: 'Companies Home', 'Search Companies', 'Following (15)', 'Add a Company', and 'FAQ'. Below this is a search bar for companies with a 'Search' button. The main content area is titled 'Followed Company Updates'. The first update is from OpenText, featuring a photo of a modern building and text about a 'Weekly Recap'. Below the photo are interaction options: 'Like (7)', 'Comment', 'Share', and '1 day ago'. The second update is from Forrester Research, titled 'Wearable computing bigger for enterprises than consumers?'. It includes a small image of a person wearing glasses and text discussing wearable devices like Google Glass, Jawbone Up, Nike+ FuelBand, and Samsung Galaxy Gear. Interaction options for this update are 'Like (15)', 'Comment', 'Share', and '1 day ago'. On the right side, there is a section titled 'Companies You May Want to Follow' which displays a grid of company logos including Hovercraft, Idiom, Dell, and others.



Note: To learn more about following a company, visit <http://bit.ly/LIHelp-FollowCompany>.

Gaining Insights into Their Business

While viewing a company page on LinkedIn, you can learn much about a company, especially in the “Insights” tab located to the right of “Products & Services.”

You can gain insights about skills and expertise in that company’s industry, as well as which employees might have new titles. You can learn where employees came from and view former employees you might know. That information will also lead you to other companies to target. The **People Also Viewed** and **Most Recommended** sections also provide valuable sources of information, such as the names of people to follow and additional insights.

Here’s how to get started:

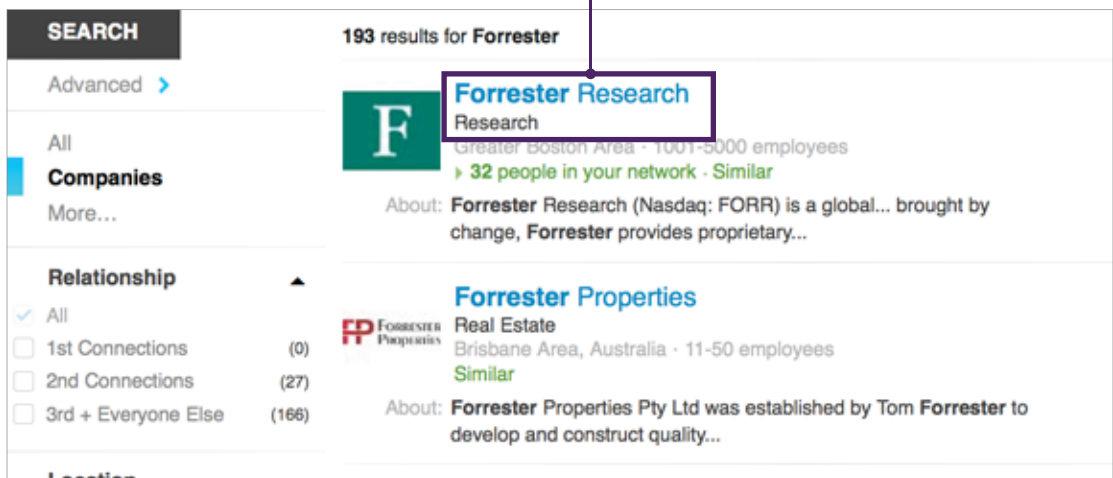
1. Click the company symbol on the left side of the search box.



2. In the search box, type the company name you are searching for.



3. Click the blue **search** button (the magnifying glass).
4. When the company you want appears, click it. (For example, “Forrester Research.”)

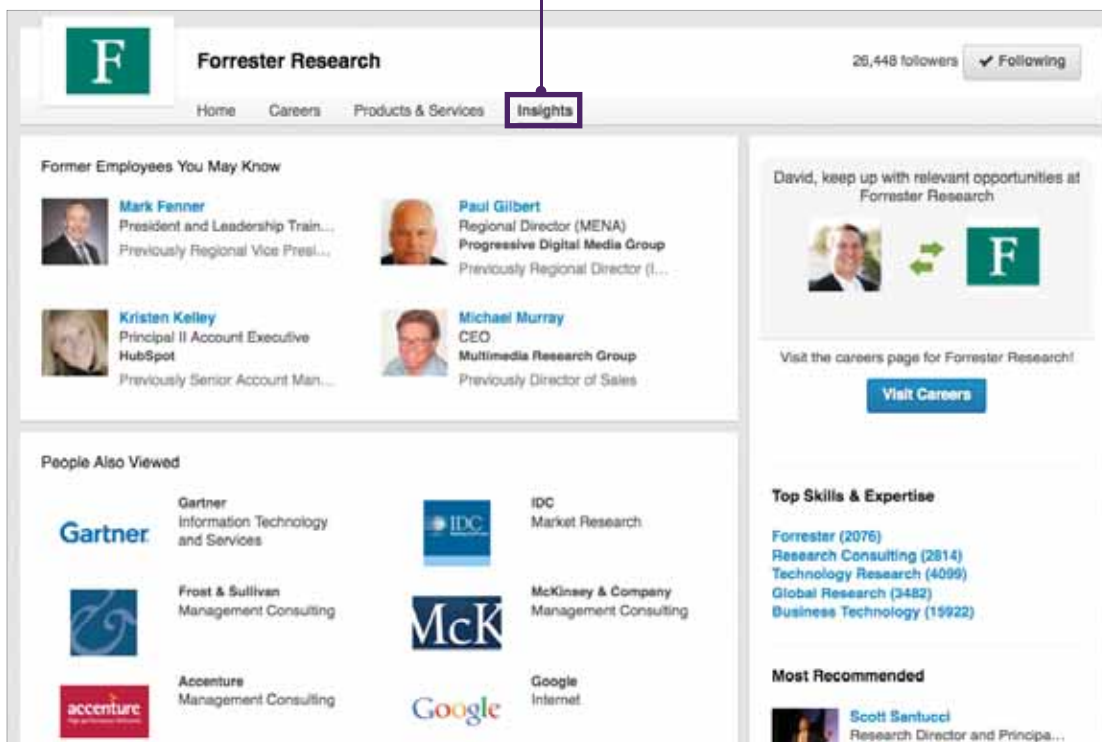


Researching Prospects and Clients

5. Click Follow. (You will now receive updates about this company.)



6. Click Insights, located to the right of Products & Services.



As noted above, you'll be able to see **Employees with New Titles**, **Former Employees You May Know**, **Where Employees Came From**, and **Top Skills & Expertise**. These areas give you access to other people to connect with who may lead to viable prospects.

The companies in the **Where Employees Came From** section are potential companies to target.

As noted earlier, the **People Also Viewed**, **Most Recommended**, and **Top Skills & Expertise** also provide insights. (To see these sections, you might need to scroll down.)

Researching Prospects and Clients

Lastly, as you scroll down, you will see **Top Skills & Expertise**. This area can be very valuable if you have expertise in a certain field.

For example, let's assume that you have expertise in a certain area, such as Global Research. You'd click **Global Research** under **Top Skills & Expertise**.

Top Skills & Expertise

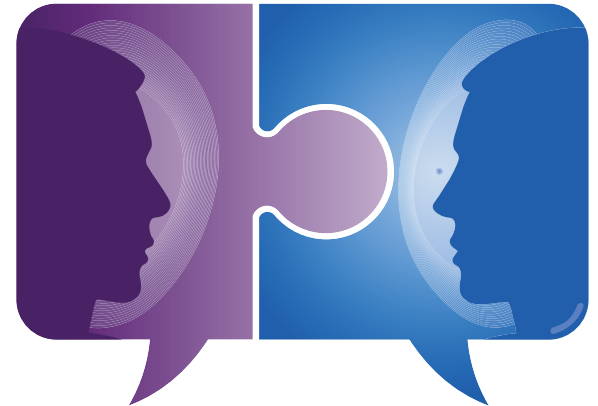
- Forrester (2076)
- Research Consulting (2814)
- Technology Research (4099)
- Global Research (3482)**
- Business Technology (15922)

Within the Global Research area, you'd find more professionals in this specialty to network with, potential groups to join, and other companies in this field.

The screenshot shows the LinkedIn 'Skills & Expertise' page for 'Global Research'. On the left is a sidebar with a search bar and a list of related skills including AAU, Message Testing, Multi-country, Online Focus Groups, Tracking Studies, Online Panels, Copy Testing, MaxDiff, IDis, Laddering, mTAD, Brand Health Tracking, Ad Tracking, USA, Forrester, Triads, Choice Modeling, Euromonitor, Retail Research, and CAPI. The main content area features a 'Global Research' skill card with a 4% increase icon, a description of the Global Settlement, and buttons for 'Add Skill' and 'Edit Your Skills'. Below this is a list of 'Global Research Professionals' with profile cards for Philip McNaughton, Lisa Han, Gunilla Broadbent, Ashish Rastogi, Peter Huijboom, Jatinder Bhangra, and Nelson Davis. To the right, there are sections for 'Related Companies' (listing M3 Global Research, UXalliance, Ipsos, J.D. Power, and Forrester Research) and 'Related Locations' (listing New York, London, Chicago, Richmond, and Kew). At the bottom, there is a 'Global Research Groups' section featuring the 'Next Gen Market Research (NGMR)' group with a 'Join' button.

Connecting with Prospects and Clients

There are various approaches to connecting with others on LinkedIn. The most effective ways include using common courtesy and building a relationship rather than just selling.



The goal, when connecting with contacts, is to build relationships and to network! This differentiates you from the mass e-mail marketing approach used heavily by sales reps on LinkedIn. Time and again, this shotgun approach fails to show a return and additionally is found to be bothersome and intrusive by many. (It might also cause problems for you if you are overly aggressive and are reported as spam. LinkedIn may restrict your usage. That will be addressed later in this guide.)

You want to position yourself in a way that adds value and that builds a relationship. Establish trust; relationships are based on trust, and trust must be earned, which is the key to connecting correctly.

Once people see you as someone they like and trust, they will be willing to connect with you on LinkedIn. Eventually, once relationships are built, they will be willing to refer you to a potential contact.

Connecting Effectively

The best way to begin building a relationship is to start with a personal invitation to connect.

You should never use the standard “stock wording” of the LinkedIn invitation.

This is how the default comes up when you invite someone to join your network. “I’d like to add you to my professional network on LinkedIn.”

Invite Luisa to connect on LinkedIn

How do you know Luisa?

- Colleague
- Classmate
- We've done business together
- Friend
- Other
- I don't know Luisa

Include a personal note: (optional)

I'd like to add you to my professional network on LinkedIn.

- Mike

Important: Only invite people you know well and who know you. [Find out why.](#)

Send Invitation or **Cancel**

You should delete their words and add your own personalized message that shows sincerity and explains why you would like to connect.

Write a personal message that shows your intent to support their networking endeavors. When you are sincere in your intent to provide value and to support a potential connection’s efforts, you are more likely to find success in building your network and building a strong relationship.



Connecting Effectively — An Example

Mike would like to connect with Luisa Baars on LinkedIn. While she is not a prime prospect, she knows many executives at his target company, and she would be a good professional to add to his network.

He first needs to locate her on LinkedIn. Then, he must send her an invitation asking her to connect.

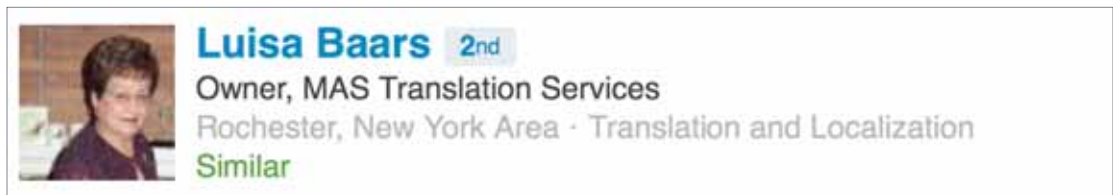
1. Go to the People search toolbar at the top of LinkedIn.



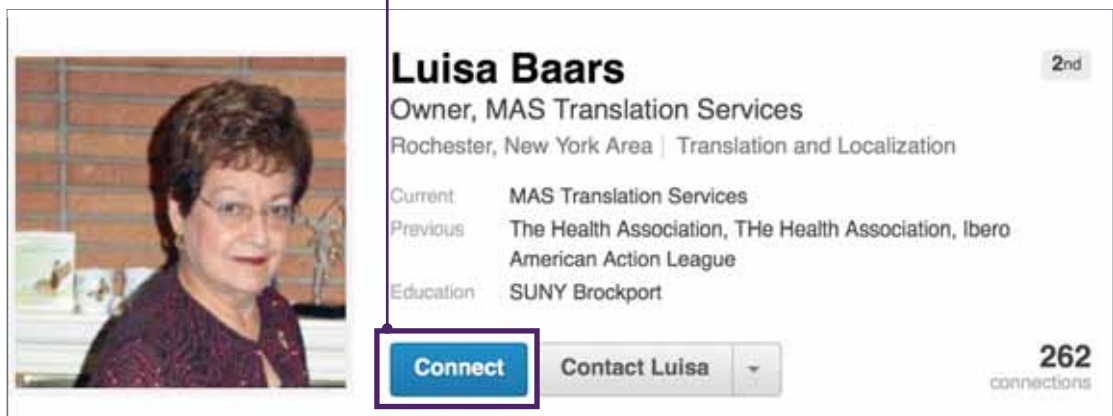
2. Type in **Luisa Baars** and click the blue **search** button (magnifying glass).



3. When Luisa's profile appears, click it.

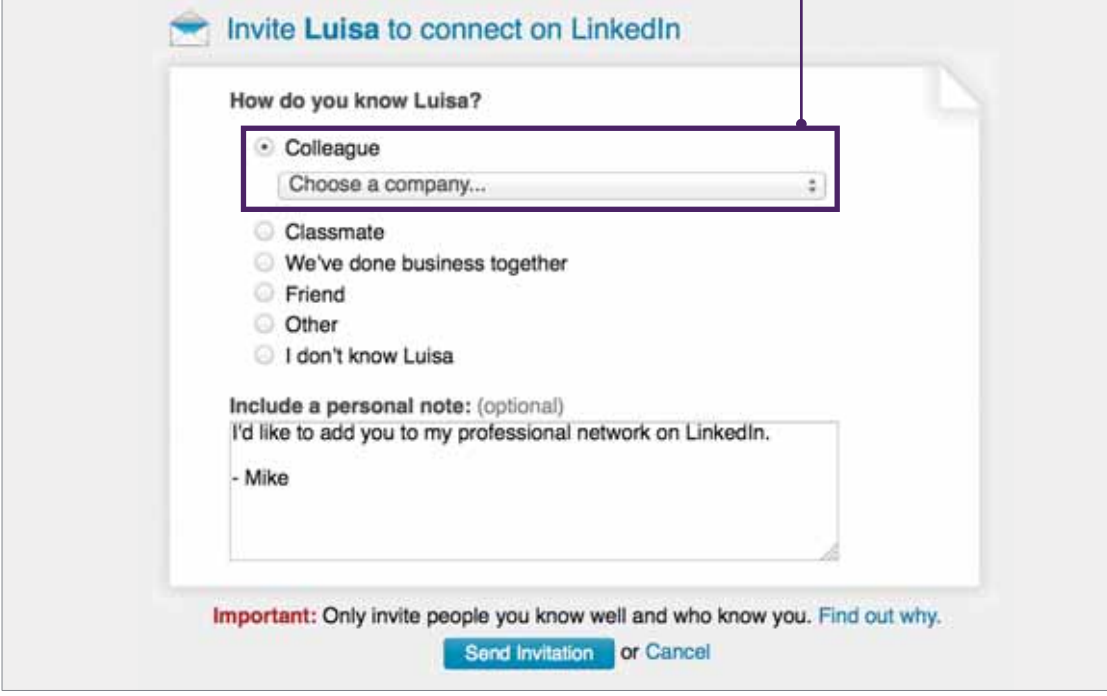


4. Click **Connect**.



Connecting with Prospects and Clients

5. Click the button that indicates how you know her.



Invite Luisa to connect on LinkedIn

How do you know Luisa?

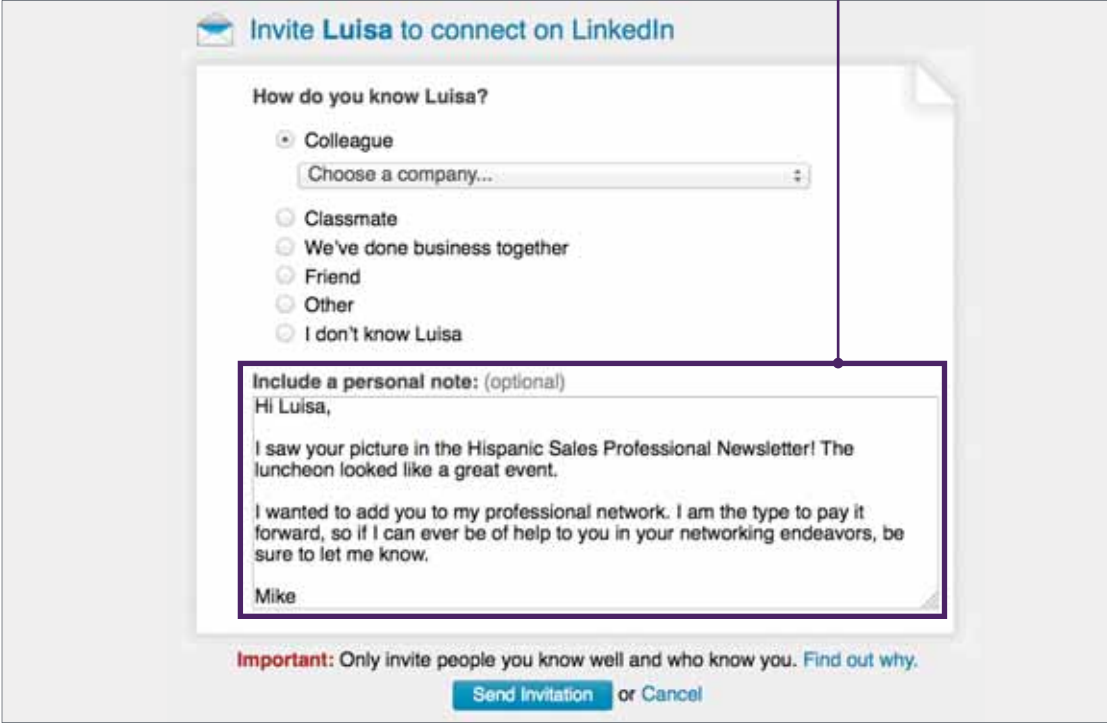
- Colleague
Choose a company...
- Classmate
- We've done business together
- Friend
- Other
- I don't know Luisa

Include a personal note: (optional)
I'd like to add you to my professional network on LinkedIn.
- Mike

Important: Only invite people you know well and who know you. [Find out why.](#)

[Send Invitation](#) or [Cancel](#)

6. Type A PERSONAL MESSAGE.



Invite Luisa to connect on LinkedIn

How do you know Luisa?

- Colleague
Choose a company...
- Classmate
- We've done business together
- Friend
- Other
- I don't know Luisa

Include a personal note: (optional)
Hi Luisa,
I saw your picture in the Hispanic Sales Professional Newsletter! The luncheon looked like a great event.
I wanted to add you to my professional network. I am the type to pay it forward, so if I can ever be of help to you in your networking endeavors, be sure to let me know.
Mike

Important: Only invite people you know well and who know you. [Find out why.](#)

[Send Invitation](#) or [Cancel](#)

Connecting with Prospects and Clients

(LinkedIn limits this type of message, so you have to be succinct and write your message in 300 characters or less!)



Note: If you exceed the allowed number of characters, an error message appears. You can then shorten your message so it is within the allowed number of characters.

Invite Luisa to connect on LinkedIn

How do you know Luisa?

- Colleague
Choose a company...
- Classmate
- We've done business together
- Friend
- Other
- I don't know Luisa

Include a personal note: (optional)

Hi Luisa,

I saw your picture in the Hispanic Sales Professional Newsletter! The luncheon looked like a great event.

I wanted to add you to my professional network. I am the type to pay it forward, so if I can ever be of help to you in your networking endeavors, be sure to let me know.

I hope to see you soon.

Mike

✖ You have exceeded the maximum length by 18 character(s).

Important: Only invite people you know well and who know you. [Find out why.](#)

Send Invitation or **Cancel**

7. Click **Send Invitation!**

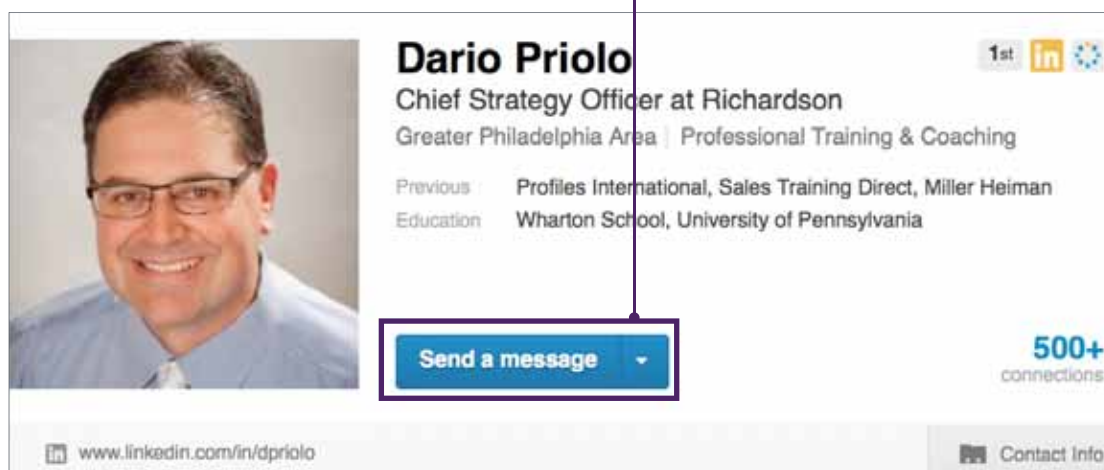
Connecting with Prospects and Clients

Follow Up

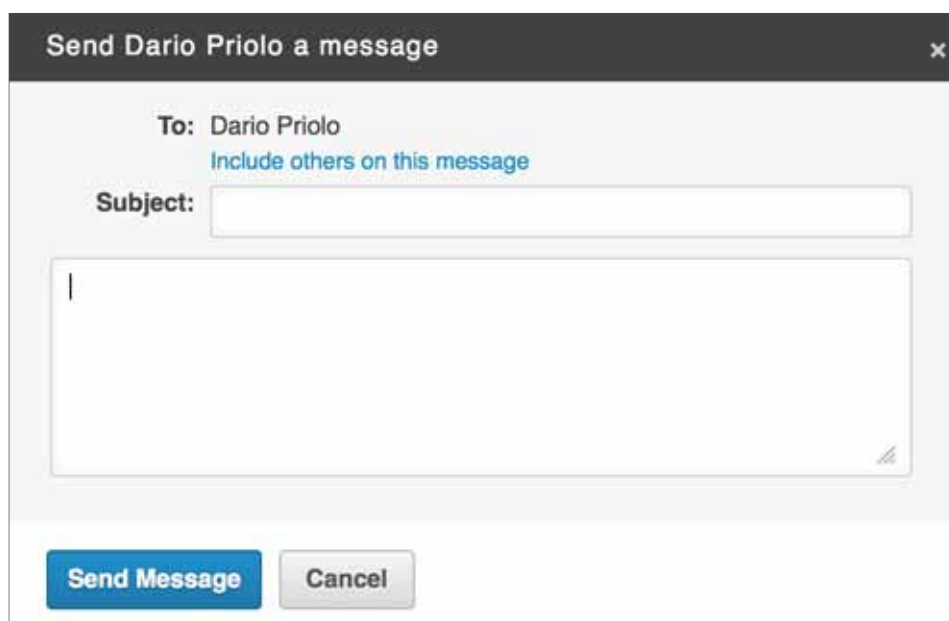
After your connection accepts your request, it is a great idea to follow up. People rarely do this, so it will help set you apart in a positive manner.

Here's how:

1. Go to their profile, and click **Send a message**.



2. In the open window, write a personal message.
3. Click **Send Message**.



Connecting with Prospects and Clients

Here's an example of what you might say:

Hi <Name of New Connection>,

I wanted to take a moment to say thanks for connecting with me. I'm sincerely glad you did. Unlike many people who "connect and run," I enjoy meeting my connections to discuss our businesses and mutual interests and to explore ways that we might support each other, either now or in the future. Is this something you enjoy doing as well? If so, I'd welcome the opportunity to network with you. My schedule is most open on <date, times> and <date, times>.

Anything in there work for you?

<My name>

Following up and writing a personal note sets you apart from the many others on LinkedIn in a positive manner.

Requesting Introductions

After finding a viable contact, you can ask for an introduction from a mutual connection.

Requesting an introduction to a contact you would like to connect with requires a healthy relationship between you and the common connection. This is more complex when you would like to connect with someone who is not a part of your first- or second-level connections but who is a part of a connection's network.

Third-level introductions are completed at the leisure and discretion of the common connection. But, if the relationship has been maintained, if your presence is known, and if you demonstrate value in your request, your chances of success are higher.

Of course, you could always connect directly on your own to second-level connections, but it's helpful to be introduced if you have a good relationship with those who are connected to you. You are not able to directly connect to third-level connections on LinkedIn, so you would need to request introductions for those connections.

To request an introduction:

1. Find the contact you would like to be introduced to.
2. Hover your mouse pointer over the drop-down arrow on the gray **Send InMail** button
3. Click **Get introduced**.

The screenshot shows a LinkedIn profile for Amy Giddings. Her profile includes a photo, her name, title, and location. Below this, her current and previous roles are listed. At the bottom of the profile, there are buttons for 'Connect' and 'Send InMail'. The 'Send InMail' button has a dropdown arrow, and the 'Get introduced' option is highlighted in a red box. The 'Send InMail' button is also highlighted in a red box. The profile shows 500+ connections and a '2nd' degree connection indicator.

Connecting with Prospects and Clients

4. Choose which connection you would like to introduce you to your potential contact.

Introduction Request

Daniella Colletta

?

Amy Giddings

Who should make the introduction?

Showing 3 shared connections between you and Amy Giddings.

	Brett Burchette Assistant Professor of Sport Management at Drexel University	171 Shared Connections Drexel University, Temple University
	Josh Brackett Ticket Operations Intern at Philadelphia Eagles	36 Shared Connections Drexel University
	Greg Monforte Marketing/Office Assistant at Daddis Fight Camp	28 Shared Connections

5. Click the person you choose.
6. Type an introduction message, and add a subject line.
7. Click **Send Request**.

Introduction Request

Daniella Colletta

Meghan Adams
Change

David DiStefano

Craft your message like a pro:

- 1. State your intent**
Be clear about why you're asking for an introduction.
- 2. Give an out**
Be professional and give Meghan Adams a way to say no.

Subject

Tell Meghan Adams why you want to get introduced
(may get forwarded to David DiStefano)

Send Request Cancel

Connecting with Prospects and Clients



Request for Introduction — Example

Here is an example of what to write in your request:

Introduction Request

Daniella Colletta → Meghan Adams *Change* → David DiStefano

Craft your message like a pro:

- 1. State your intent**
Be clear about why you're asking for an introduction.
- 2. Give an out**
Be professional and give Meghan Adams a way to say no.

Subject

Tell Meghan Adams why you want to get introduced (may get forwarded to David DiStefano)

Send Request **Cancel**

Subject: Intro to <Name of Contact>

Hi <My Connection>, how are you?

Hope all's well in your world. I'm writing because I came across <Name of Contact>'s profile recently and noticed we shared a common interest in <brief mention of topic> and several valued connections, like yourself. I'm wondering if you would be willing to introduce me.

I'd like to get <Name of Contact>'s perspective on <topic, issue, or industry challenge> and share some interesting data I came across recently. I look forward to hearing from you soon and appreciate your consideration!

Thanks, <My Name>

(There is no limitation on the number of characters in this LinkedIn window, so be sure to customize it and write in a sincere and down-to-earth manner. Remember, the intent is to build the relationship and get to know people at this point. It is not to sell!)



Note: To learn more about introductions, visit <http://bit.ly/LIHelp-Introductions>.

Providing Recommendations

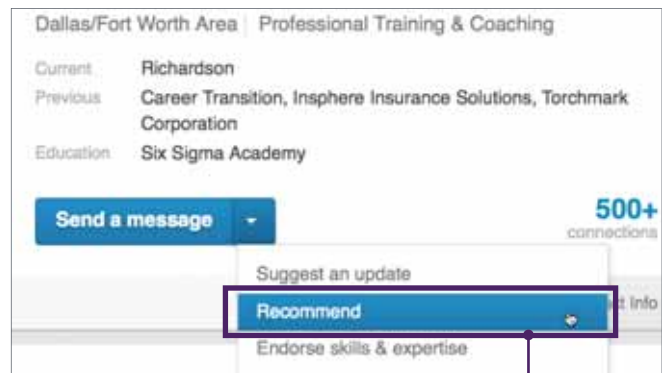
LinkedIn recommendations, just as in the general world of business, hold much weight and value.

Providing a recommendation ensures that you can extend a first-hand account of a connection's skill set, expertise, knowledge, and/or work ethic.

Your recommendations should be well written, as you would expect the same in return. Recommend your colleagues and clients for their efforts, acknowledging their value as an important part of your professional network.

To provide a recommendation:

1. Go to your connection's profile.
2. Hover your mouse pointer over the drop-down arrow on the blue **Send a message** button.



3. Click **Recommend**.
4. Click the appropriate button, depending on who your connection is:



5. Click **Go**.



Note: To learn more about recommendations, visit <http://bit.ly/LIHelp-Recommendations>.

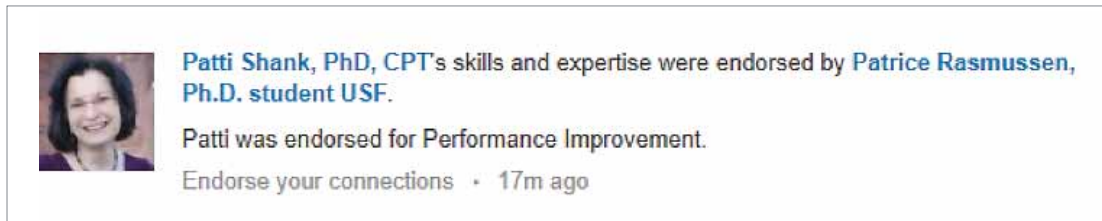
Endorsing Clients and Connections

LinkedIn endorsements have been most commonly referred to as single-click recommendations.

Your LinkedIn connections have already identified their skills and areas of expertise. You are able to endorse them for the skills and expertise areas they have identified, as well as for any unlisted skills or areas of expertise.

Endorsing your connections shows that you can attest to their abilities and their strengths. By personally endorsing them, you are recognizing them.

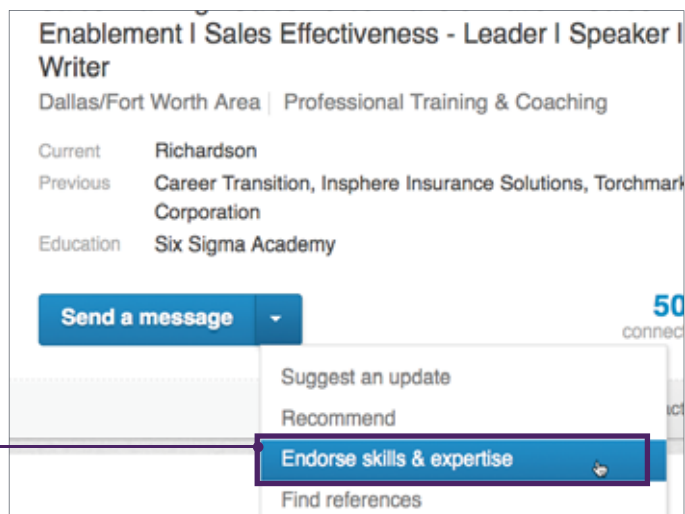
There is another benefit of endorsements. The endorsements show up under your LinkedIn Activity. They will be seen by all of your connections. Giving endorsements and being associated with talented people establishes your credibility.



When you endorse your connections, depending on their settings, they might also get an e-mail notification that you endorsed them. This is a great way for you to stay on their “radar screen” and for them to be reminded of you in a positive manner.

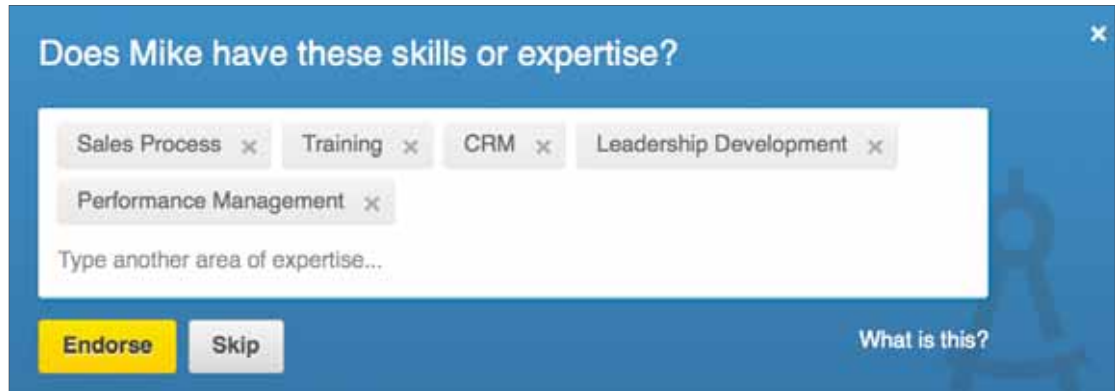
To endorse a connection:

1. Go to your connection's profile.
2. Hover your mouse pointer over the drop-down arrow on the blue **Send a message** button.
3. Click **Endorse skills & expertise**.



Connecting with Prospects and Clients

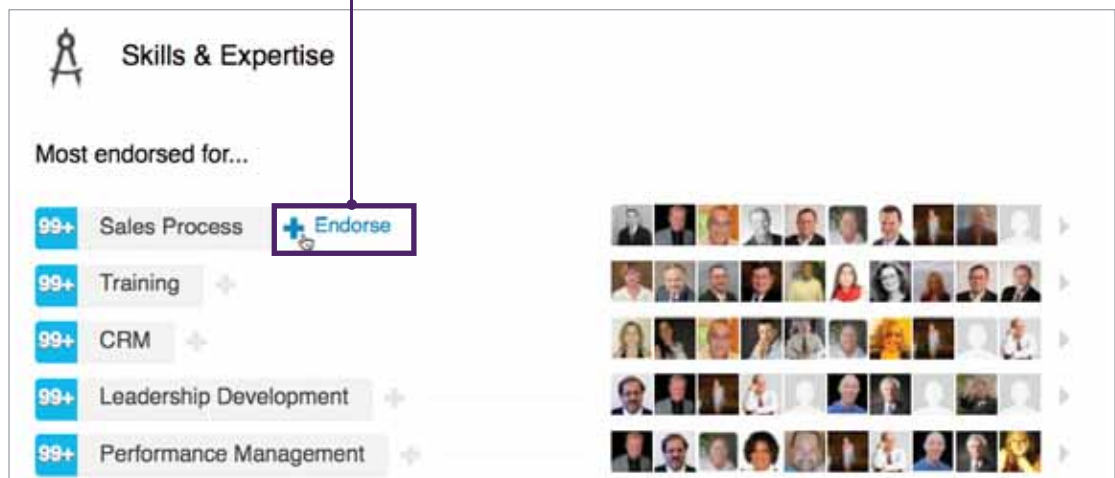
4. Choose which skill or area of expertise you would like to endorse.



5. Click **Endorse**.

There is another way to endorse a connection:

1. Go to your connection's profile.
2. Scroll down until you see the **Skills & Expertise** section.
3. Next to each listed item, there is a plus sign. Hover your mouse pointer over the plus sign, and click **Endorse**.



Note: To learn more about endorsements, visit <http://bit.ly/LIHelp-Endorsements>.

InMail: An Option to Connect with Prospects and Clients

LinkedIn markets InMail as a credible outreach tool that has been documented as being 30% more effective than regular e-mail.¹ This tool allows you to message those you don't know and are not connected with on LinkedIn.

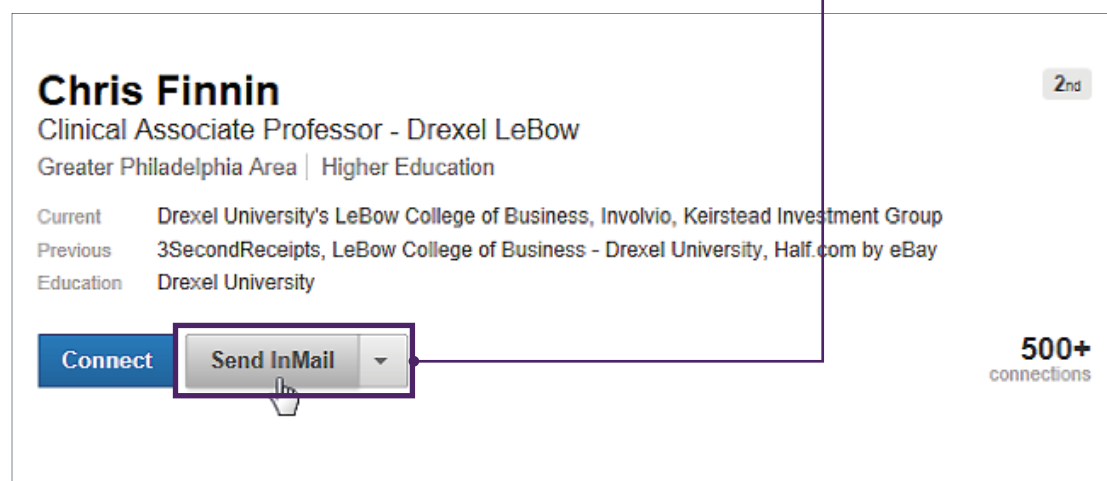
However, be aware that this is a limited service. The basic/free LinkedIn account is limited to ten InMails per month at \$10.00 each. Some people perceive InMails as spam, although LinkedIn does a great job of marketing them as welcomed messages. A well-worded InMail can be very successful.

InMail can be a great messaging mechanism to initiate a conversation with someone you cannot contact otherwise.

Prior to sending an InMail message, know who you are sending it to. Acquaint yourself as much as possible with that person's profile, name, and occupation. Gather as many insights as possible to personalize your message. Also, be sure to present a clear request or purpose within the body of your InMail message.

To send an InMail message, follow these steps:

1. Search for the person you would like to contact.
2. Once you have retrieved that person's profile, click **Send InMail**.



3. Fill in all needed data, and personalize your InMail message.

Connecting with Prospects and Clients

You should know that messaging and sending InMails are two different ways of contacting people on LinkedIn. You can message anyone and everyone you are connected to or share a group with — without any limitations — but you'll use InMail to contact people you are not connected to. InMails must be purchased separately on a free LinkedIn user account.



Note: To learn more about InMail, visit <http://bit.ly/LIHelp-InMail>.

¹ <http://www.socialmediaexaminer.com/10-reasons-why-you-should-upgrade-your-linkedin-account/>

Connecting via Groups

As mentioned previously, group memberships on LinkedIn can provide deeper insights into the contact you are connecting and communicating with.

If there is a shared group among you and a contact, LinkedIn allows you to send a message and connect with them. Join the group, and openly participate in discussions. Shared groups can act as common ground for you to reach out to a viable contact.

If you belong to the same group as a contact, or a contact belongs to an open group (meaning you can see and comment on discussions), you can view the discussions they've started or participated in. This provides several possible benefits:

- You can read and learn about what interests your contact has, what expertise they have, or what they are struggling with based on what they are writing in the discussions.
- It provides an opportunity to comment on the discussion to add value, show your expertise, or ask questions that make them think. Perhaps you can find something they have said to agree with, comment on, or add to to engage them in the discussion. You may find yourself talking to them directly in the group, and developing a relationship before you ever approach them as a prospect. This is very strategic and may play in your favor.
- If you engage them and start a relationship, based on the conversation you and your contact had in the group, it may allow you to send an invite to connect.
- Or, if you decide to send them a prospecting message outside of LinkedIn (through another of the various “multi-channel communication” approaches), you can use what you learned about them in the group to warm up that approach and increase the likelihood of success.



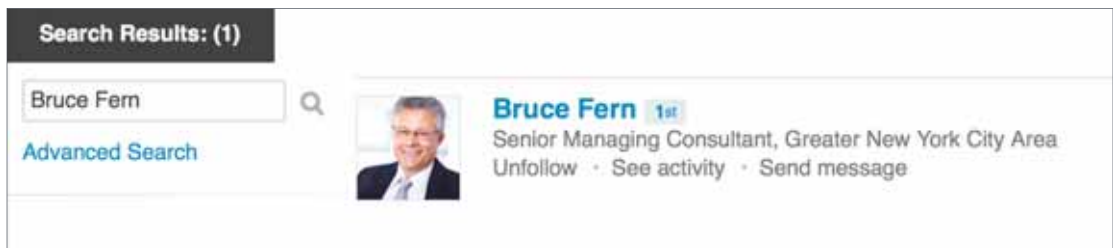
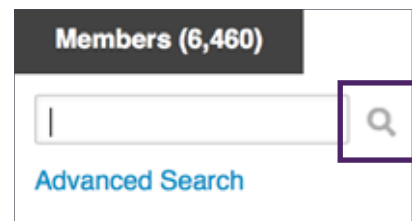
Connecting with Prospects and Clients

To contact a prospect or client within a shared group, follow these steps:

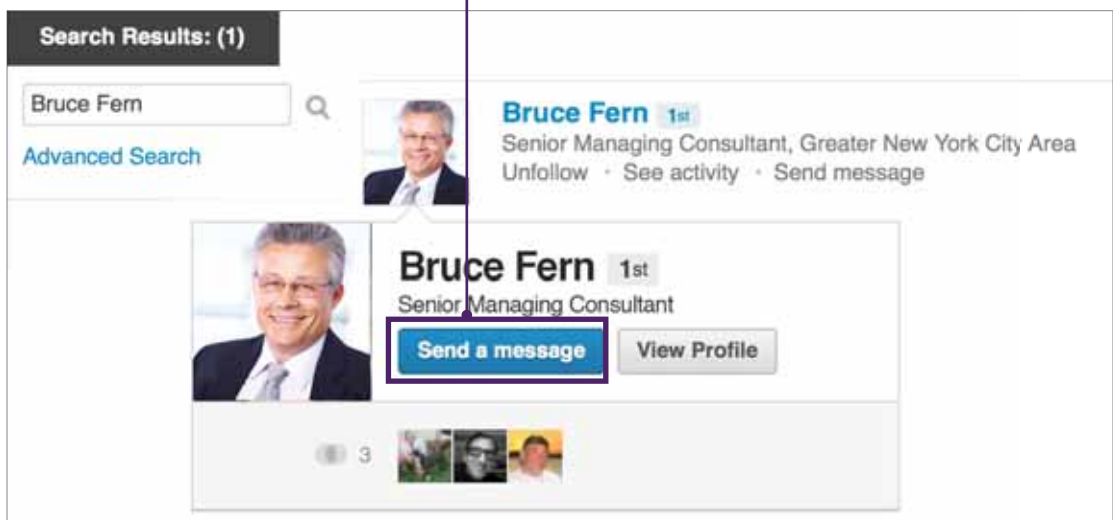
1. Go to the shared group profile.
2. Click **Members**.



3. Type your contact's name in the search box.
4. Click **Search** (magnifying glass).
5. When your contact's name appears, click it (for example, "Bruce Fern").

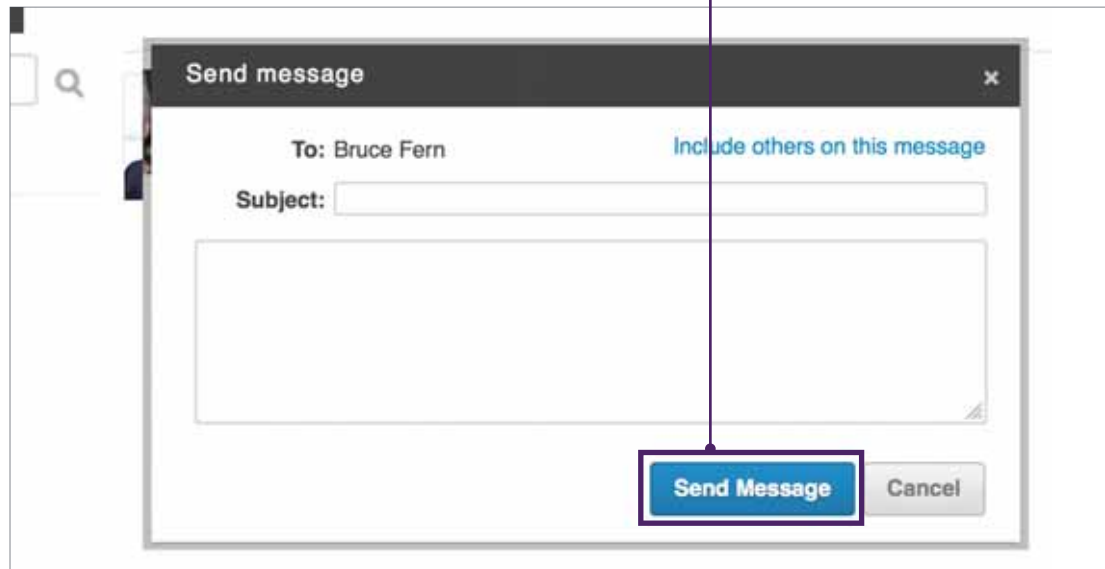


6. Hover the mouse pointer over their name. The Send message symbol appears.
7. Click **Send message**.



Connecting with Prospects and Clients

8. Type a subject line and a personal message in the pop-up window, and then, click **Send Message**.



We will talk more about what to say and how to communicate effectively in the “Communicating with Contacts” section.

However, it is worth noting here that an important benefit of connecting in groups is that you are able to send messages to group members even if you are not connected to them. This is a huge benefit because it enables you to communicate directly with contacts that you wouldn’t otherwise be able to gain access to.

As a basic/free LinkedIn member, you are entitled to join 50 groups. When you are selling, it makes sense to take note of which groups your key contacts have joined and join them!

Connecting with Other Professionals

As noted earlier, LinkedIn works well when you have many connections. The more connections you have, the greater your chances are that someone can introduce you to others you might want to connect with. Obviously, it behooves you to connect with many professionals and to have many people in your network.

Having said that, don't just connect to anyone and invite "bad" connections, as the people in your network reflect on you. Here are some guidelines that you might follow for deciding who to invite into your network. Ultimately, you will decide what works best for you.

A good rule of thumb is to invite people that you know and trust. Many people only invite people that they have personally met. Sometimes, because of distance, that isn't possible. Other people decide that having a phone conversation or exchanging e-mails with a professional who holds the same high standards in their field will be sufficient criteria. Some people are open networkers and allow anyone to join their network. Others will accept the referral of a colleague into their network.

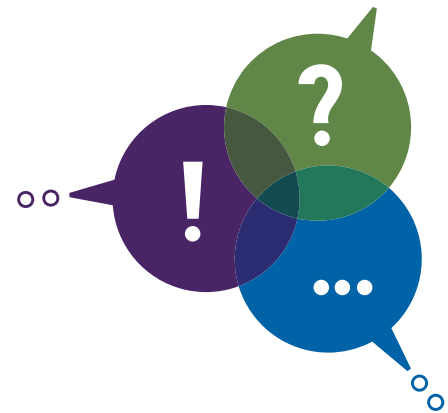
Decide what works for you, and create a list of who you'd like to invite. As you build your LinkedIn network connections, consider inviting your network acquaintances and associates, including people you know from:

- Professional organizations
- Current employees
- Past work places
- Trade shows
- Clients (current and past)
- Vendors (current and past)
- Neighborhood/Church acquaintances
- Social media (Facebook, Twitter, etc.) followers
- Your e-mail lists (LinkedIn has a feature to help you easily do this; however, use this with caution if you don't personally know everyone in your e-mail contact list.)
- Competitors' clients (If you do connect with your competitors' clients, you may wish to hide your contacts — a LinkedIn feature that is explained on page **60** of this guide.)



Communicating with Prospects and Clients

Beyond building relationships, LinkedIn provides opportunities to communicate with your network connections. You can reach out in different ways.



As a LinkedIn member, you can communicate by sending messages to each other if you are connected. You can also communicate within groups. You can “broadcast” relevant information in your status updates to your connections. You can link your company blog to your profile and share pertinent information in your personal profile.

The way you communicate also defines your professional presence and credibility and this can be illustrated in how you write your profile and in your purposeful participation in Group discussions.

Credibility and communication go hand in hand. Thus, to build credibility, you must communicate effectively and often.

Communication does not have to be directed only to your prospects. Your LinkedIn activity should include self-generated posts or status updates; sharing content that your prospects, clients, and all connections find interesting or helpful.

Forty-eight percent of LinkedIn members claimed they did not mind being approached unsolicited on LinkedIn, given that the information and/or role were relevant. This speaks volumes in terms of understanding your contacts and understanding what it is they are looking for. They are seeking relevant information that resonates with them, their company, and their objectives. The importance of relevance is paramount and surrounds all facets of LinkedIn communication, such as InMail, personal messages, comments, introductions, etc.

Communicating within Groups

Once you have joined a group and have located an ideal prospect, you can communicate in discussions and send a message directly to that contact.

Strategies for participation within a group setting include researching member activity and searching for your contact's participation patterns to see what they are commenting on, responding to, reacting to, and posting about.

Look through past discussions for their opinions, comments, interests, agreements, and disagreements to better understand how to connect with your contact and build rapport. If your contact is involved in a current discussion, involve yourself.

Send a personal message to your contact to engage them in the particular topic and offer value. Try to refrain from pitching to your contact and offering your contact insight on the group's public forum, as your competition may be following closely.



Here are two examples of what to write to group members:

1. **Based on a Group Discussion:**

Hi <Their Name>,

We discussed <topic> in <name of group> recently, and I was sincerely impressed with your comments. You're the type of industry pro that I like to connect with, so I'm inviting you. (If we connect, great! If not, may I please ask that you simply Archive my request?) I look forward to hearing from you, <Their Name>. Many thanks, <My Name>

2. **Common example:**

This is a **“Common Group” example** if you can’t find one of their discussions to participate in:

Hi <Name of Contact>,

I saw your profile today and noticed that we share common interests and this group. I value connecting with other professionals with similar interests and wonder if you’d like to connect and explore how we may be a resource for each other, over time? (If yes, great! If not, may I please ask that you simply Archive my request?) Thanks, <My Name>



Note: When you send a message through Groups, there is no limitation on the number of characters, so feel free to customize the message to suit the situation.



Note: To learn more about sending messages to fellow Group members, visit: http://help.linkedin.com/app/answers/detail/a_id/192.

Upkeep of Personal Profile

David DiStefano
President and CEO, The Richardson Company
Greater Philadelphia Area | Professional Training & Coaching

Current: Richardson
Previous: Vistage International, PwC, Stockton Bates LLP.
Education: Drexel University - College of Business and Administration

Connect | Contact David | 500+ connections

Twitter: davidstef13
www.linkedin.com/in/davidstefano

Activity

Michael Marlon endorsed the skills and expertise of David DiStefano
David is endorsed for Leadership.
Endorse Connections | 13 days ago

Background

Summary

I am a passionate and authentic business leader with over three decades of successful senior management experience with both early-stage and global organizations. I have twenty years of experience in the sales training and sales effectiveness industries. As President and CEO of Richardson, the premier global sales performance organization, I lead our talented team in support of our clients' successes. In 2011, I was honored to receive a Best-in-Biz Award for "Executive of the Year." I frequently speak at industry conferences and serve as a strategic advisor to our clients. Richardson has achieved significant year over year growth – and been named as an "Inc. 5000 Fastest Growing Company" for 3 consecutive years. Prior to joining Richardson, I spent 10 years with PwC.

I spend most of my time connecting the dots! Linking vision, strategy, process and execution to develop solutions that drive real business outcomes for both Richardson and its clients.

People Similar to David

Bill Zarrilli
SVP, Chief Financial Officer, Richardson
Connect

People Also Viewed

Linda Richardson
Founder, Chairwoman Richardson, Author, Consultant, Faculty Wharton Graduate School

Dario Priolo
Chief Strategy Officer at Richardson

Andrea Grodnitzky
Senior Vice President, Global Performance Solutions at Richardson

Jim Brodo
SVP, Marketing at Richardson

Deborah Antonelli
Sales Leader at Richardson

Your personal profile on LinkedIn serves as a reflection of who you are. Update your profile to establish your professional credibility. Ensure that your profile is complete and that it is written in a professional manner.

Just as you browse the profiles of your prospects and clients, we can assure you that they are perusing through your profile the very same way.

Position your personal brand in a way that considers what your contacts would like to see. Tailor your profile to the needs and wants of those you are connecting with. In terms of search results, LinkedIn works in a similar way to major online job boards. Profiles that are optimized (contain pertinent industry or product keywords that clients might search for) and updated regularly return higher in search results than other profiles.

Sharing Relevant Information with Prospects and Clients

Establishing your professional credibility through your profile, presence, and purposeful participation in LinkedIn includes forwarding relevant information on to prospects and clients. Be proactive in your approach to reaching out, showing interest, and adding value. The keyword here is relevant; relevancy will separate your efforts and may serve as a call to action in itself.

Post useful information for your connections to see and potentially use. You also have the option of forwarding relevant information via e-mail or as a personal message on LinkedIn. Pay attention to the needs and interests of your connections, and act accordingly.

Here's how:

1. Go to your LinkedIn home page.
2. Type what you'd like to share in your status update window.
3. Click the up/down arrow to indicate where you'd like to share.



4. Click the option for where you would like to share your information.



5. Click **Share**.

Managing Routine Activity

Again, like networking in general, pay it forward by sharing valuable content. When you do this routinely, this builds credibility. Post, share, comment, endorse, and recommend, all of which show your efforts, your care and concern, and your attentiveness. Instill confidence and trust among your connections through routinely and regularly being a valuable contributor on LinkedIn.

Two sources of automation that can be used to regularly update your LinkedIn profile, along with other social platforms, are Twitterfeed and Dlv.it. These tools allow you to share your company's blog posts or other trusted, appropriate content automatically after a one-time setup to ensure you are active on LinkedIn and sharing appropriate content. If interested, you can learn more about these RSS-sharing tools at:

- Twitterfeed: <http://twitterfeed.com/>
- Dlv.it: <http://dlv.it/>

Here are examples of status updates that position you as an expert and provide valuable content:

Mike Kunkle via [twitterfeed](#)

It's not a big surprise that big data, business intelligence and analytics – in various iterations – are hugely dominant topics in the software market and business world. For the past few years, it seems that there's been more articles, blogs and op-ed pieces about big data... [more](#)



Big Data Deployments Strangely Low

[smartdatacollective.com](#) · It's not a big surprise that big data, business intelligence and analytics – in various iterations – are hugely dominant topics in the software market and business world. For the past few years, it seems that there's been more articles, blogs and...

Like · Comment · Send a message · Share · 21 hours ago

Mike Kunkle via [twitterfeed](#)

We've all heard, "It's not what you know, it's who you know" more than once. Networking is essential, especially in today's business world. But it's not enough to just introduce yourself to people, you need to really put yourself out there and generate a meaningful... [more](#)

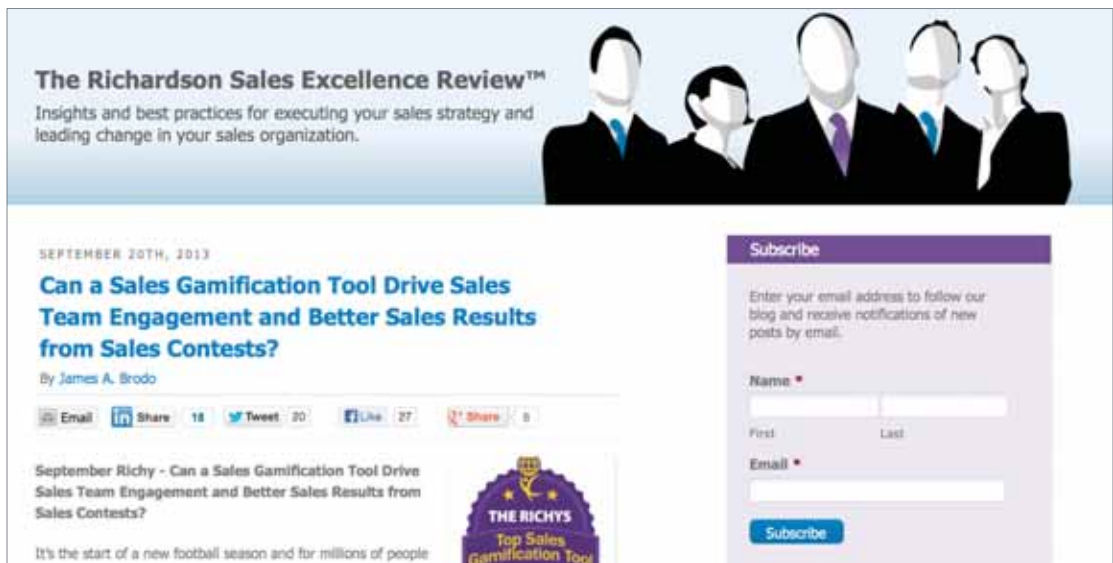


6 Tips to Help You Network Your Way to Success

[consulting.resourceassociatescorp.com](#) · Over fifty percent of a first impression is based off of appearance alone. Keep that in

Linking Your Company Blog and Resources to Your Profile

Make your prospects and clients aware of what your company is up to. Your company's blog communicates thought leadership and can assist with lead generation. Utilize this fountain of knowledge, subscribe to it, and link your company blog, as well as other resources, to your LinkedIn profile. Contacts also like to see what your company is involved in, especially if they are unfamiliar with your products or services. Again, establish credibility and inspire consumer confidence.



You can add your company blog URL in your profile.

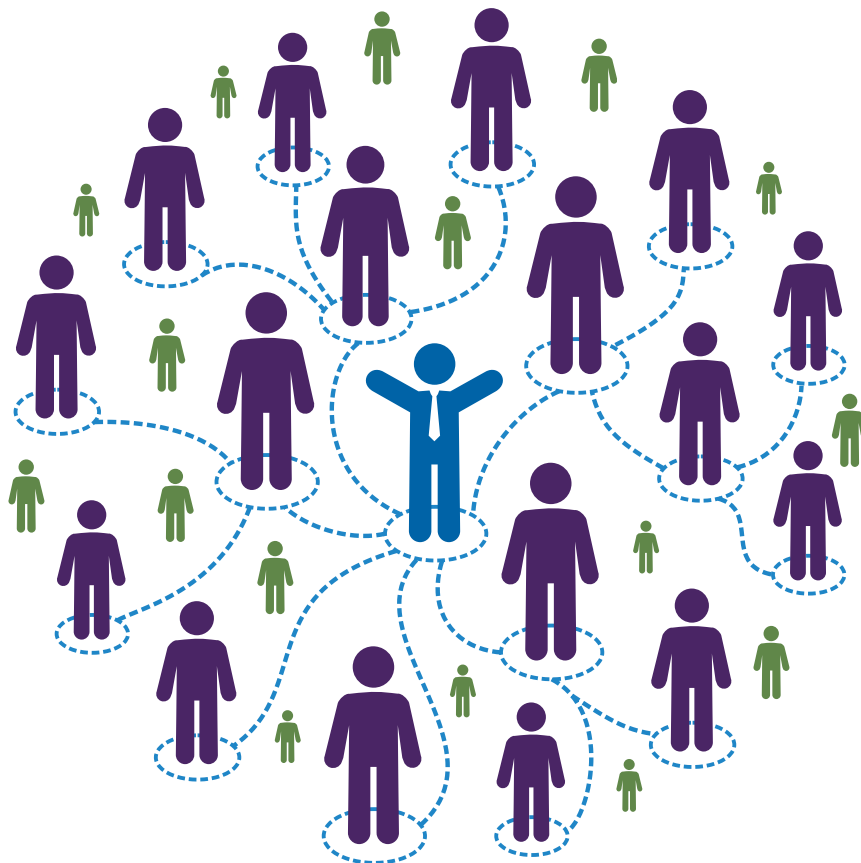
1. Go to your profile.
2. Click **Edit Contact Info**.
3. Click **Edit** (next to the website URL).
4. Customize one of the websites with your company's blog address.



Other LinkedIn Tips

As you have learned in this guide, LinkedIn is a valuable source for researching, connecting, and communicating with contacts. Hopefully, you have gained many insights to connect with people and to build your network.

This last section of the guide provides other helpful tips and tricks to help you use LinkedIn effectively. Be sure to bring your own individual style and creativity as you use these tips and build your network on LinkedIn.



Defensive Mechanisms/Hide Who Can See Your Connections

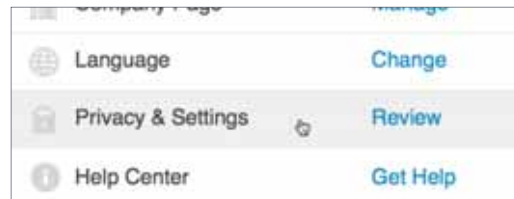
It has been suggested that you connect with your competitor's clients. Because this is a great prospecting method, your competitors will be looking to do the same. To defend this action, you have the ability to hide your connections on LinkedIn.

Here's how:

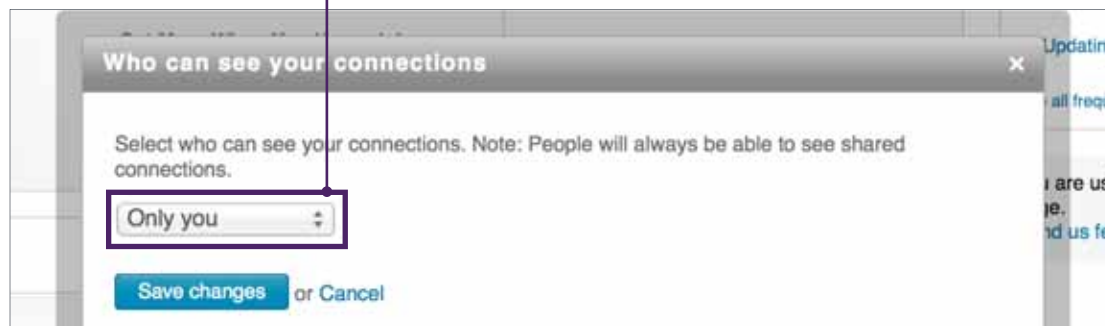
1. On your LinkedIn home page, hover your mouse pointer over the photo on the far right side.



2. Click **Privacy and Settings**.
3. Click Select **who can see your connections**.



4. Select **Only you**.



5. Click **Save Changes**.

LinkedIn Limitations

LinkedIn places these limitations on free user accounts:

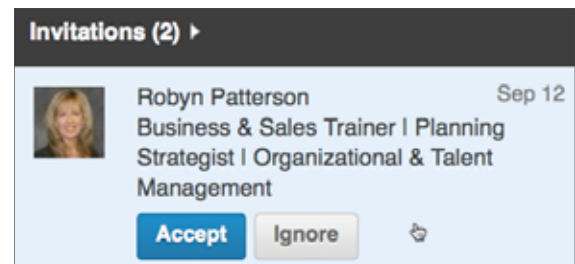
1. You can only request up to five introductions at a time.
2. You can only view 100 results per search.
3. You can only save and get weekly alerts on up to three searches.



Note: To learn more about the types of accounts, visit <http://bit.ly/LIHelp-AccountTypes>.

What to Avoid

Avoid connecting with people that you don't know. When you invite someone to connect, they can either **Accept** or **Ignore** your invitation.



LinkedIn has a lockout feature that is enacted when someone you invited has indicated that they do not know you. If they click ignore, they have the option to click "I don't know this person" or "Report as Spam."



Either choice can be detrimental for you. If they click "I don't know this person," it prevents you from reinviting them in the future. If you receive an excessive number of "I don't know this person" responses, you will be restricted from sending invitations to connect to others. (LinkedIn doesn't publish how many "excessive" is; however sources say that problems have arisen when they received only five "I don't knows!")

This restriction typically means that you will be required to enter the e-mail addresses of users when you attempt to connect.

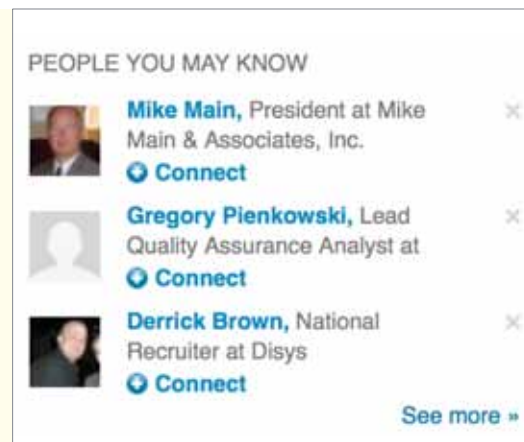
If you are reported as spam, and if it is your first restriction, a message appears when you log in. If you agree to its terms, you'll be given another chance. On your second offense, you must contact LinkedIn customer service to get the restriction lifted.

Other LinkedIn Tips

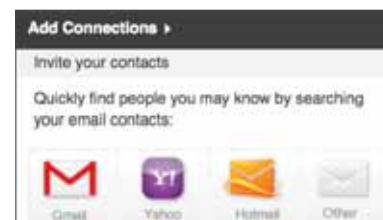
People tend to be less likely to click the “I don’t know this person” button or “Report as Spam” when they are approached respectfully. Be sure to personalize your message and explain why you are asking to connect.

Think about your intent. Are you trying to build your network? Or, are you trying to sell to them? (If so, remember that this is not the time and place!) Will they feel like they are being spammed when they receive your message? Here are some phrases that can help avoid problems when crafting your message:

- *“I realize we haven’t met, but your name came up on my LinkedIn “People You May Know” screen. I see that LinkedIn is right! We do have commonalities, such as John Doe. If you’d like to connect, I’d welcome the opportunity!”*
- *“I don’t know if you remember meeting me, but Bob Simmons introduced us at the Graphics Trade Show last year.”*
- *“I have been impressed by your discussion comments on closing techniques and feel the exact same way. I want to connect with more like-minded sales professionals and wondered if you are interested in growing your LinkedIn network.”*
- *“I don’t get to meet many professionals in the semiconductors industry here in Nebraska, and I want to build my network, so I hope you don’t mind that I am reaching out to you. I’m always willing to pay it forward and share resources and best practices. Is there anything I can do to help in your networking endeavors?”*



Avoid using the LinkedIn “Add Connections” feature, which asks if you’d like to invite your contacts and connect with your e-mail accounts. Connect individually instead. People often have “strangers” in their contact lists, and those “strangers” might report them as “People I Don’t Know.”



Customize Your LinkedIn URL

It's important to make LinkedIn work for you and to customize it. Be sure to make yourself easy to find so that others can connect with you!

You can customize your public profile URL when you edit your public profile from the Settings page. Custom public profile URLs are available on a first-come, first-served basis.

Do customize: www.linkedin.com/pub/janedoe

Don't: www.linkedin.com/pub/jane-doe/3/a93/2 (the arbitrary URL that LinkedIn assigns)

To customize your LinkedIn URL:

1. Move your cursor over your name (in the top-right part of your page), and select **Settings**.
2. Click **Edit your public profile** (near the bottom-right part of the page).
3. In the **Your public profile URL** box on the right, click **Customize your public profile URL**

Settings

[Manage your Twitter settings](#)

Helpful Links

[Edit your name, location & industry »](#)

[Edit your profile »](#)

[Edit your public profile »](#)

[Manage your recommendations »](#)



4. Type the last part of your new custom URL in the text box.
5. Click **Set Custom URL**.

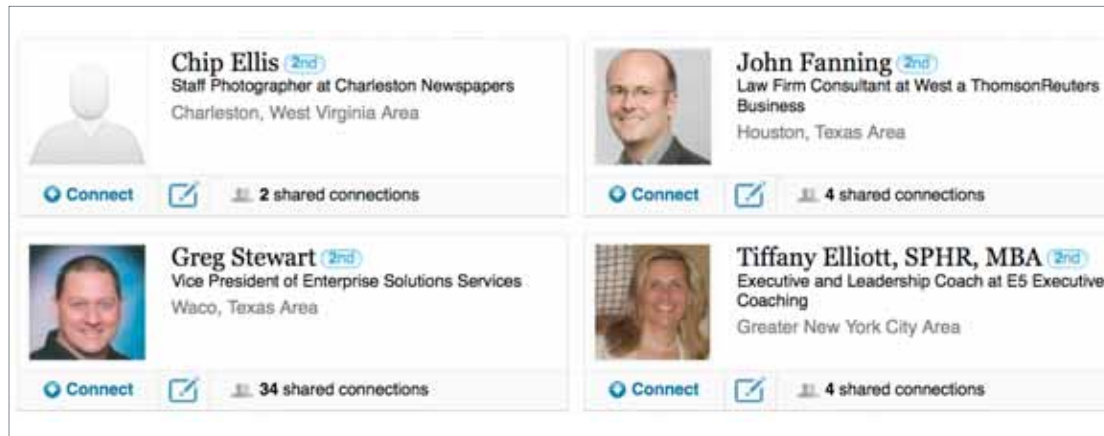


Note: Your custom URL must contain between five and 30 letters or numbers. Please do not use spaces, symbols, or special characters. Choose a URL that is easy to remember.

Other LinkedIn Tips

Insert a Photo in Your Profile

Who would you rather connect with: a blank head or a real person?



It's more appealing to do business with a real person! Choose a picture that portrays a professional image. This is your chance to brand yourself in a positive manner. Don't use a picture with a beer in your hand or with a silly grin on your face.

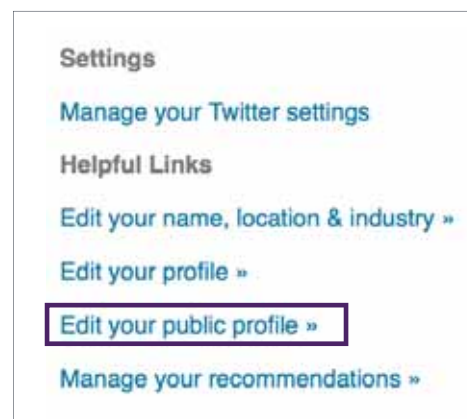
Your picture should give the impression that you are someone who people will like, trust and want to do business with.

Invest in a headshot at your local digital photography shop (this typically costs \$35 for a JPG file, which will give you a crisp, professional close-up shot.)

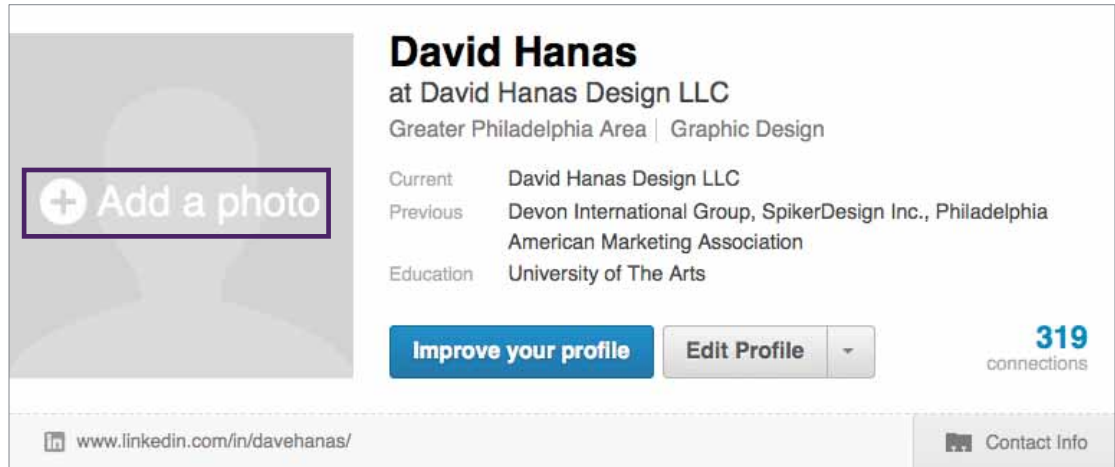
Some people actually use black and white photos because they are different and stand out. Whatever you choose, make sure to upload a photo that has a professional look!

To upload a photo to your profile:

1. Move your cursor over your name in the top-right part of the page, and select **Settings**
2. Under Settings, click **Edit your public profile** (near the bottom right).



3. In the blank head area, click **Add a photo**.



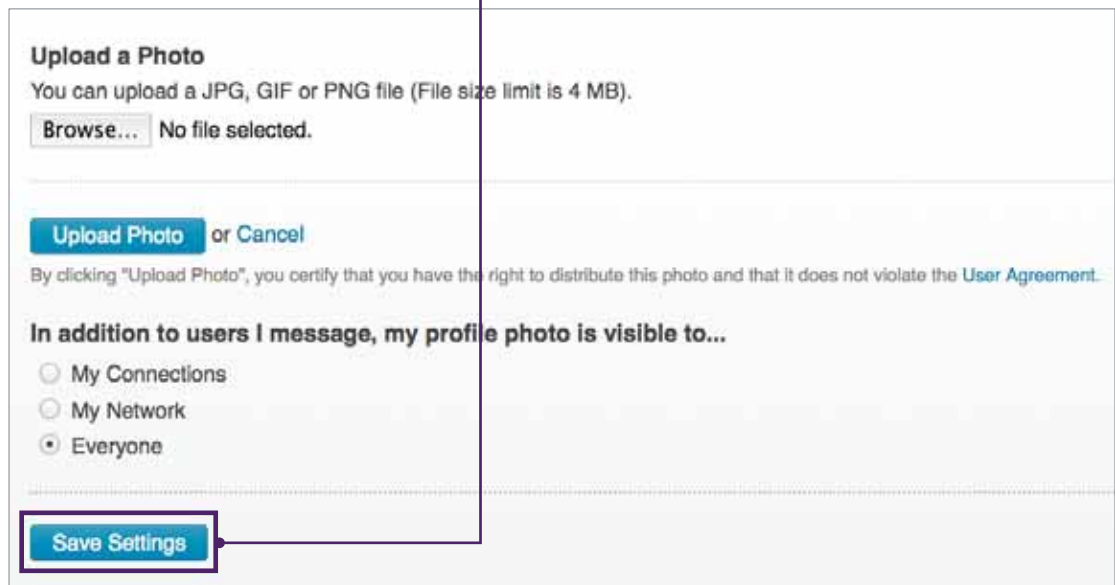
David Hanas
at David Hanas Design LLC
Greater Philadelphia Area | Graphic Design

Current David Hanas Design LLC
Previous Devon International Group, SpikerDesign Inc., Philadelphia American Marketing Association
Education University of The Arts

[Improve your profile](#) [Edit Profile](#) 319 connections

www.linkedin.com/in/davehanas/ [Contact Info](#)

4. Upload a photo, and click who you want to be able to view your photo (such as “My Connections”). Click **Save settings**.



Upload a Photo
You can upload a JPG, GIF or PNG file (File size limit is 4 MB).

[Browse...](#) No file selected.

[Upload Photo](#) or [Cancel](#)

By clicking "Upload Photo", you certify that you have the right to distribute this photo and that it does not violate the [User Agreement](#).

In addition to users I message, my profile photo is visible to...

My Connections
 My Network
 Everyone

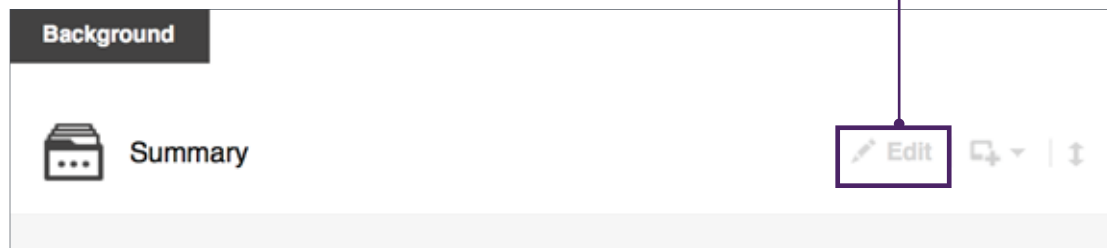
[Save Settings](#)

Complete Your Profile

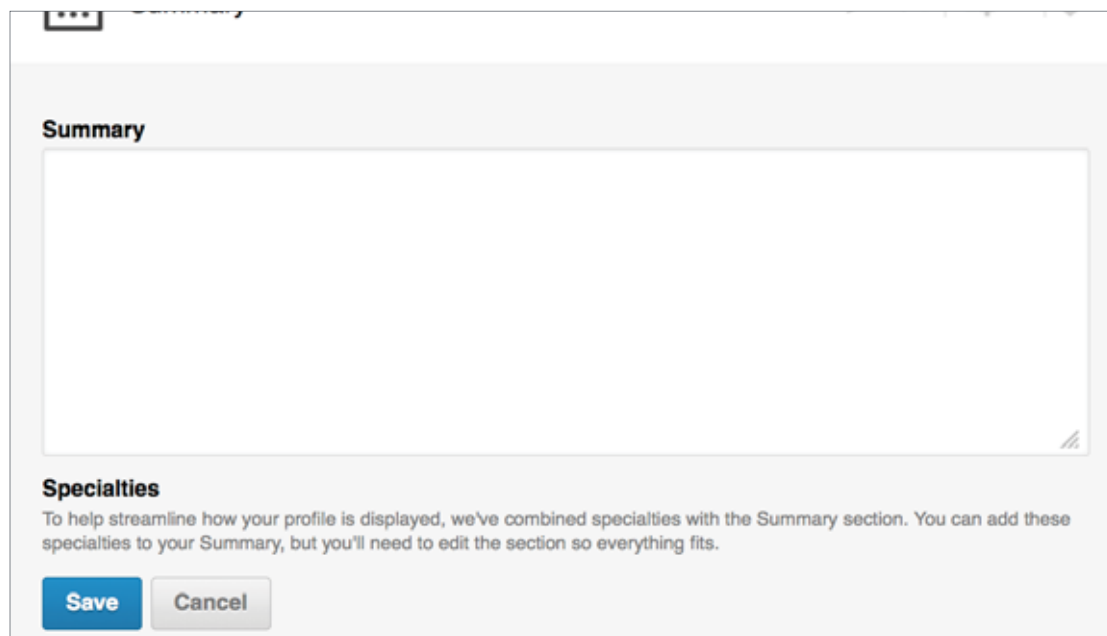
Complete your profile to give a professional appearance and to gain credibility. When you ask others to connect with you, it's only fair to give them access to your background, and it behooves you to make a professional impression.

Completing your LinkedIn background is actually easy. Follow steps one and two as you would to insert your photo (see previous section entitled "Insert a Photo in Your Profile").

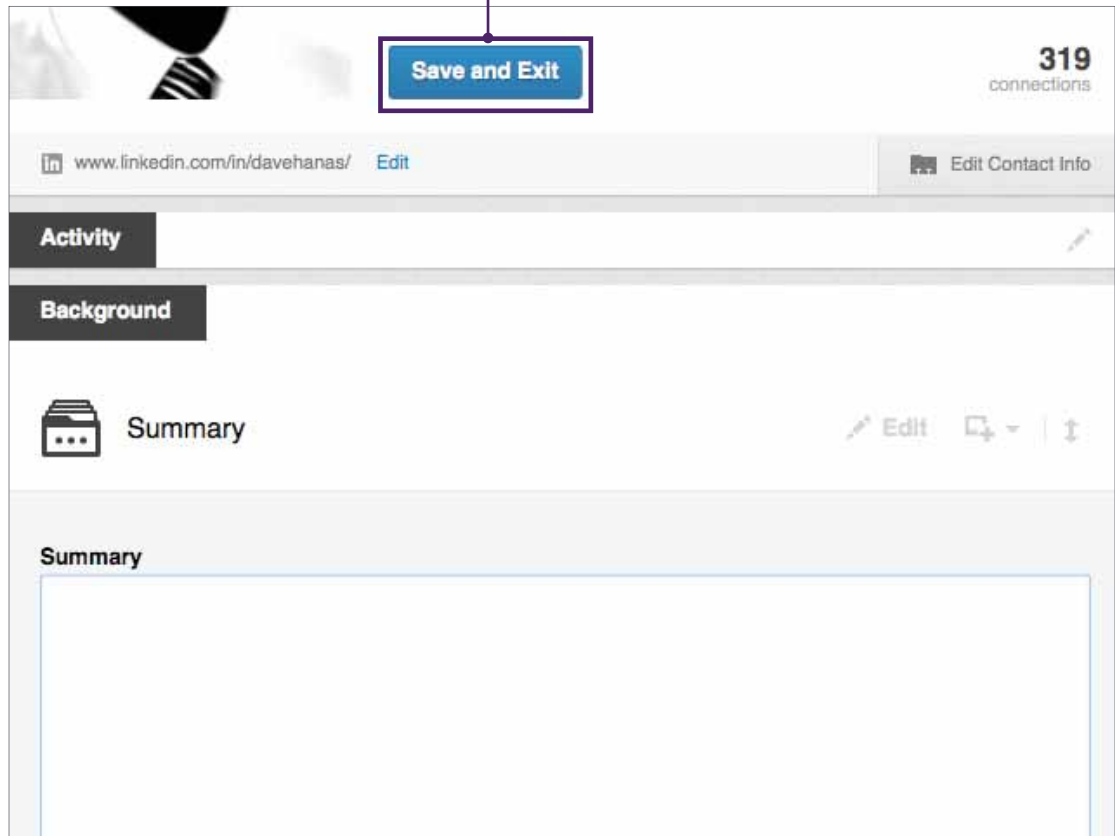
1. Click **Background**, and then, click the edit symbol (pencil).



2. Complete the summary section. Type what you feel summarizes your background and experience. You might want to review other professionals who you admire and look at what they wrote in their summary to get ideas. Of course, this is your opportunity to shine, and what you write should reflect on you and show you as a trusted, credible professional.



3. Click **Save and Exit**.



4. Add to your profile by filling in your **professional experience** and **educational history**.

If you don't complete your profile, it will be perceived with a lack of credibility and professionalism. That may cost you dearly in terms of accepted connections!

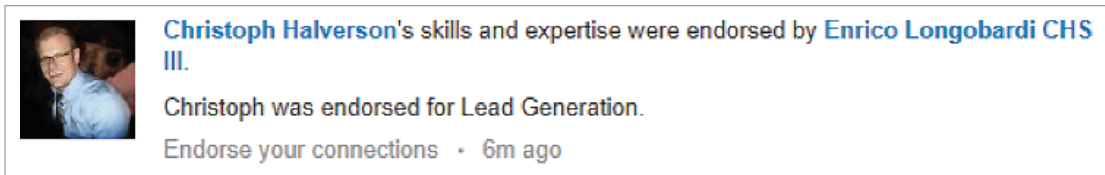



Note: To learn more about recommendations, visit <http://bit.ly/LIHelp-Recommendations>.

Other LinkedIn Tips

Use Time Triggers

When you're on LinkedIn, you can see when a contact posts an update. Therefore, you can deduce that he is still online. He may be at his computer, potentially available to receive your message or phone call.



 **Christoph Halverson's** skills and expertise were endorsed by **Enrico Longobardi CHS III**.
Christoph was endorsed for **Lead Generation**.
Endorse your connections · 6m ago

As you see, Enrico was online 6 minutes ago endorsing his connection. By timing your message, you improve the chances of making contact with a message on LinkedIn or getting through to him with a phone call.

Use LinkedIn for Conversation Starters



Review what your contact is doing online. Peruse his contacts, who he has recently connected with, and who he follows. Look for common interests.

Here's an example.

If you see he recently followed Daniel Pink, and you have genuine interest in this author, then follow him as well.

Simply click **Follow**.



 **Daniel Pink** 3rd 
Author of **TO SELL IS HUMAN, DRIVE, A WHOLE NEW MIND**, and other books
Washington D.C. Metro Area | Writing and Editing
Education · Northwestern University
[Follow](#) Know Daniel? [Connect](#) 33,423
followers
www.linkedin.com/pub/daniel-pink/0/18/337 [Contact Info](#)

By following mutual people and keeping up with their status updates, you will have interesting tidbits for starting conversations with your contact.

You might send a message on LinkedIn:

"Hi Terry,

I noticed we both follow Daniel Pink on LinkedIn. Have you read his new book? I just bought it and can't put it down! I'd love to have lunch some time and discuss his ideas. Are you free next week?"

Mike

Use Information Wisely

Use information wisely so you don't raise a red flag.

For instance, you can prove that you are a stranger and turn someone off from the start by addressing her by the wrong name. If her name is Patricia, but she always goes by Trish, you will see that in the recommendations. Read her profile and recommendations in depth before sending a message or calling.

Being prepared and thorough can help uncover helpful information.



Proactively Ask for Recommendations!

When you save the day for a client and they thank you, be sure to ask, “Would you mind putting that in a recommendation on LinkedIn for me?”



As successful sales reps, you often go the extra mile but may not always speak up to get your thanks in writing!

When a contact who is ready to buy asks if you can give a discount or move up a delivery time, ask if they'll give you a LinkedIn recommendation if you earn it. If these are concessions you are going to have to make anyway, you may as well negotiate in a recommendation for them.

Create a LinkedIn Badge

To maximize your LinkedIn brand, you can create a badge that will open to your LinkedIn profile when clicked. You can display this on your blog or e-mail signature.

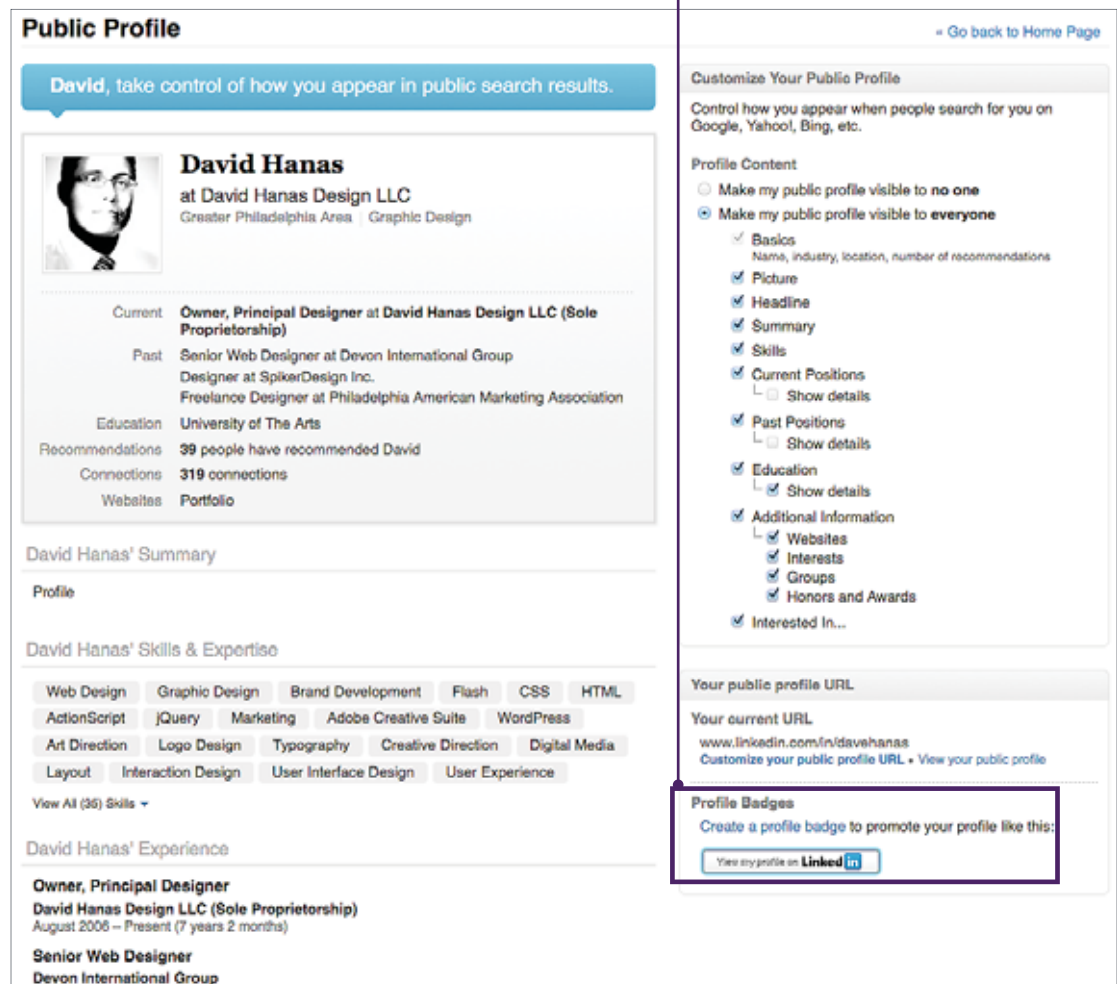
Here's how:

1. Hover the mouse pointer over your Profile, and select **Edit Profile**.

2. Scroll down to Public Profile where you see your existing URL. Click **Edit** (on the right).



3. The public profile page opens, and at the top, you will see "Your Public Profile URL."
4. Click the **Create a profile badge** button.



Public Profile

David, take control of how you appear in public search results.

David Hanas
at David Hanas Design LLC
Greater Philadelphia Area · Graphic Design

Current Owner, Principal Designer at David Hanas Design LLC (Sole Proprietorship)

Past Senior Web Designer at Devon International Group
Designer at SpikerDesign Inc.
Freelance Designer at Philadelphia American Marketing Association

Education University of The Arts

Recommendations 39 people have recommended David

Connections 319 connections

Websites Portfolio

David Hanas' Summary

Profile

David Hanas' Skills & Expertise

Web Design · Graphic Design · Brand Development · Flash · CSS · HTML · ActionScript · JQuery · Marketing · Adobe Creative Suite · WordPress · Art Direction · Logo Design · Typography · Creative Direction · Digital Media · Layout · Interaction Design · User Interface Design · User Experience

View All (36) Skills ▾

David Hanas' Experience

Owner, Principal Designer
David Hanas Design LLC (Sole Proprietorship)
August 2006 – Present (7 years 2 months)

Senior Web Designer
Devon International Group

Customize Your Public Profile

Control how you appear when people search for you on Google, Yahoo!, Bing, etc.

Profile Content

Make my public profile visible to **no one**

Make my public profile visible to **everyone**

- Basics
Name, industry, location, number of recommendations
- Picture
- Headline
- Summary
- Skills
- Current Positions
 - Show details
- Past Positions
 - Show details
- Education
 - Show details
- Additional Information
 - Websites
 - Interests
 - Groups
 - Honors and Awards
- Interested In...

Your public profile URL

Your current URL
www.linkedin.com/in/davehanas
Customize your public profile URL · View your public profile











Profile Badges

Create a profile badge to promote your profile like this:

Yes my profile on **LinkedIn**

Other LinkedIn Tips

- The LinkedIn badge page opens. Select and copy all of the code that corresponds to the LinkedIn badge you choose.

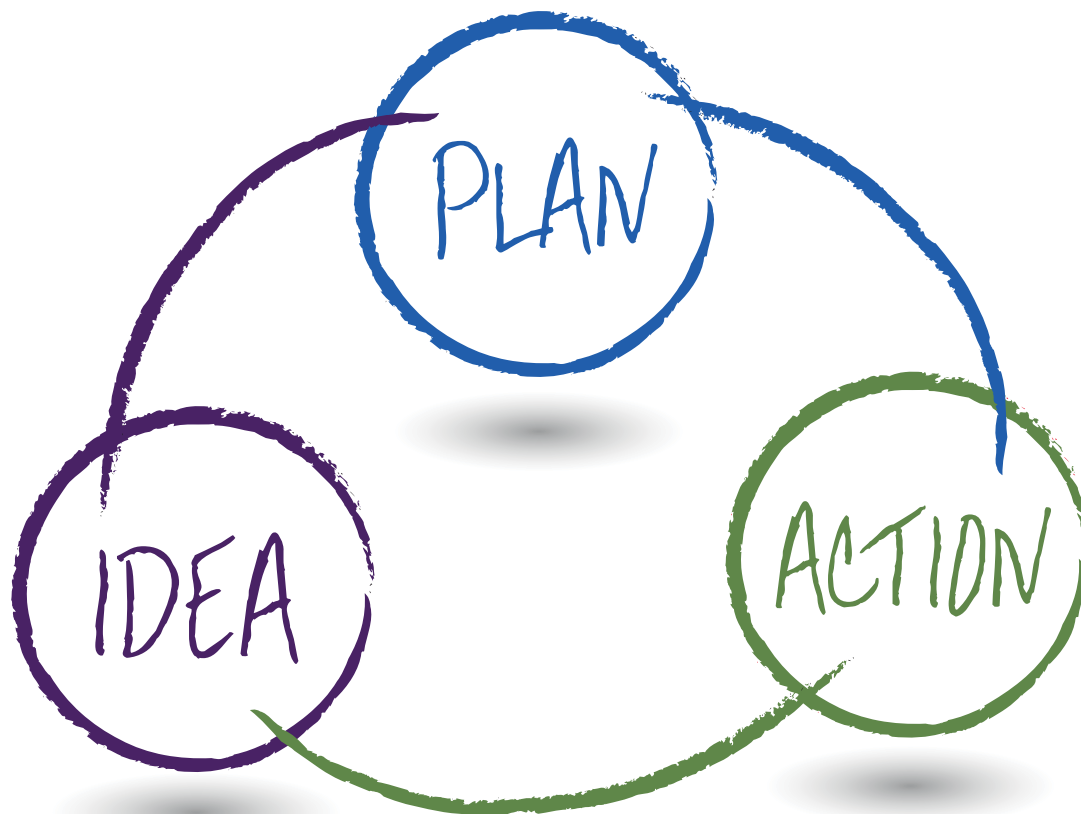
Choose a button:	... then copy and paste the code (includes a link to your public profile):
 See how we're connected	TypePad Users Click here to add this button to your TypePad blog: Add to My TypePad Blog
 (160x33)	<pre></pre>
 (160x33)	<pre> </pre>
 (160x25)	<pre> </pre>
 (120x33)	<pre> </pre>
 (80x15)	<pre> </pre>
 (80x15)	<pre> </pre>
 (80x15)	<pre> </pre>
 (80x15)	<pre>View David Hanas's</pre>
 (80x15)	<pre>View David Hanas's</pre>

- Go to the blog or signature where you want to display your badge, and paste the code that you copied.

Formulate a Plan

LinkedIn is a powerful tool, and it can take up vast amounts of your time. Determine what you want to achieve, and be realistic with what you want to accomplish. Decide how much time you can invest into your routines.

Schedule time on your calendar. Create an action plan of realistic tasks. Identify what you need to accomplish and realistic time frames. Do you want to add 20 connections? Do you want to establish yourself as an expert in one group? Set one or two goals, and revisit them in 30 days.



The Power of Google Search and Google Alerts

Google Search is a powerful tool that will help you search for prospects and clients and learn about them by researching them further. Google Alerts is an automated service that will notify you of your searches once you identify them on Google Search.



The Google Search and Google Alerts portion of this guide will help you:

- Research contacts (individuals and companies) and uncover insights about them.
- Use Google efficiently to meet your personal and business needs.

Google Search

Google is a popular search engine that is used by people to obtain the information they need through the use of keywords and operators.

Most people use the main Google page on a daily basis to search for information. When you search for business and prospecting insights, you will find that Google will bring excellent results. When searching for news on your target companies, you may find that you get your best results when you pinpoint the “News” search function.

Go to the main Google page and Click **News**.



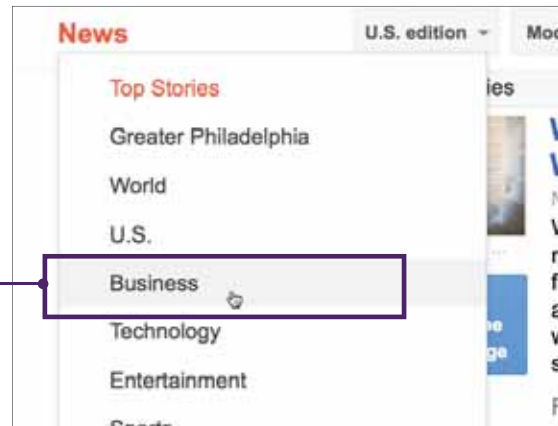
The News search window looks similar to the regular Google Search window, but it will garner results that are scrutinized more carefully by Google (for instance, they weed out how-to articles, advice columns, and job postings and include articles that are published with original reporting, honest attribution, and longstanding journalistic values).



Google Search

Depending on what you are searching for, you can fine-tune your news search.

1. Click **News**.
2. More options open on the left tool bar. Here you can filter your search to suit your needs.
3. For instance, you can click **Business**. This will ensure that your results are focused on business results.

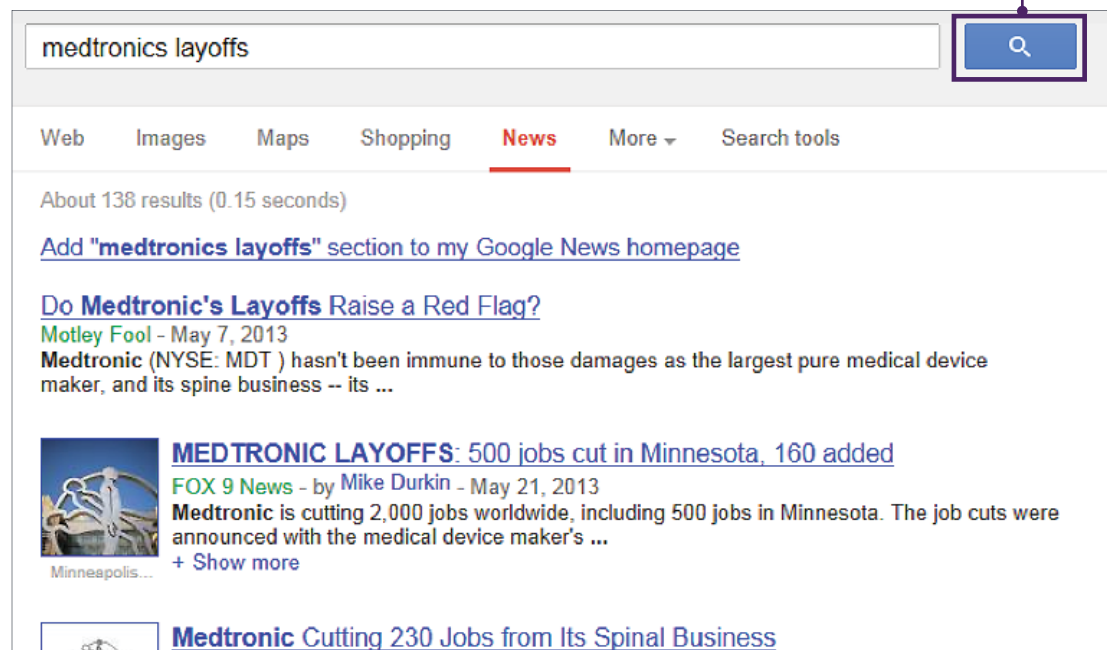


Here's an example.

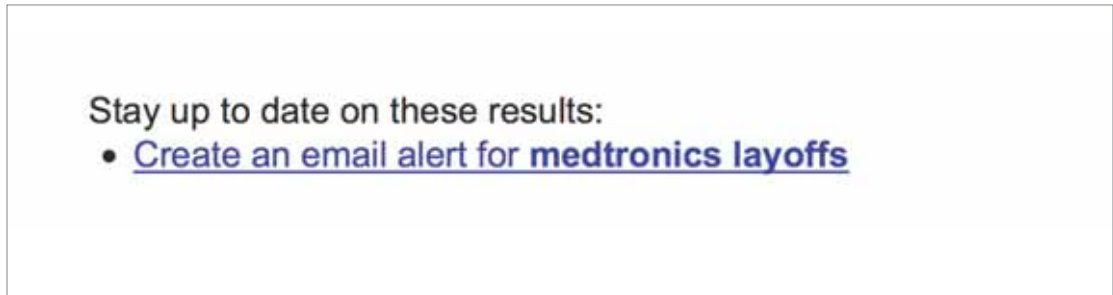
Let's say Medtronics is your client, and they just had layoffs.

1. Type **Medtronics layoffs** in the **News** search window.
2. Click the blue **search** button.

138 results appeared.



3. Scroll down to the bottom of the first page of results. Google asks if you'd like to create an alert for your search.

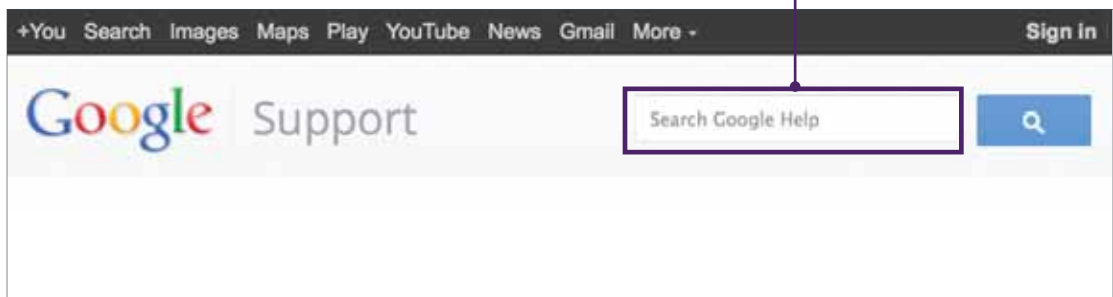


Now that you have determined search criteria that are important to you, you can set up a notification service to have the results sent to you automatically. That service is called Google Alerts.

Questions on Google Search

If you have questions when you are doing a search, access the Google Help page:

<http://support.google.com/?hl=en>



If you can't remember that link, just go to the main Google page and search "Google help".

How to Search Effectively on Google: Boolean Logic & Search Operators

Effective searches contain short, specific search phrases that enable your search engine to deliver the best, most relevant results. Be as specific as possible, and remember that less is more. Boolean logic and search operators provide a more effective way to search the internet's extensive database. Boolean consists of OR, AND, and NOT. Search operators consist of quotation marks, minus signs, tilde signs, and specific site searches. The table below explains in more detail how you can apply Boolean logic and other search operators to get the most out of your search.

OR	Will search for at least one of the search terms	E.g., Apple OR Orange	Will retrieve search results with apple, orange, & apple and orange
AND	Will search for both of the search terms	E.g., Apple AND Orange	Will retrieve search results only with apple and orange present
NOT	Will search for only one search term – the term you have selected	E.g., Apple NOT Orange	Will retrieve search results only with apple
“Example”	Use quotes around a word if you are looking for that word exactly	E.g., “Eric Johnston”	Will retrieve search results only with “Johnston” not the common “Johnson” as well
-Example	Place a minus sign in front of a word or a website you want to exclude	E.g., Apple -fruit E.g., Apple -wikipedia.org	Will retrieve search results that include apple but exclude fruit or a Wikipedia results
~Example	Place a tilde sign in front of a word to search for synonymous words	E.g., ~Food facts	Will retrieve search results that will include food facts as well as nutrition facts
Site: query	Include site: to search within a specific website	E.g., World Cup site: newyorktimes.com	Will retrieve search results of World Cup only on the New York Times website
Filetype:	Will restrict your search to particular file type	E.g., Filetype:pdf	Will retrieve search results with the .pdf extension only



Note: To learn more about Boolean logic and/or Search Operators, visit the following links:

https://support.google.com/alerts/answer/175927?hl=en&ref_topic=28416

<http://support.google.com/websearch/answer/136861>

<http://www.internettutorials.net/boolean.asp>

<http://www.internettutorials.net/basic-search-techniques.asp>

<http://www.internettutorials.net/best-bet-search.asp>

Google Alerts

Google Alerts is a content change detection and notification service offered by the search engine company Google that automatically notifies users when new content from news outlets, websites, blogs, videos and/or discussion groups matches a set of search terms selected by the user and stored by the Google Alerts service. Notifications can be sent by e-mail or as a web feed. (Source: http://en.wikipedia.org/wiki/Google_Alerts)

You can use Google Alerts as a sales intelligence tool to learn more about both prospects and current clients. You are limited only by your imagination and your understanding of how search technology works. Here are some basic ideas to get started. Google Alerts are used to:

- Remain current with your prospect and client activity, such as career milestones, professional awards/recognition, charitable activities, social interests, speaking engagements, blog posts, articles, white papers, news mentions, etc.
- Identify Trigger Events that may signify a need (challenge or opportunity) for your product and services (capabilities and differentiators).
- Stay abreast of company news for current clients and target clients.
- Establish another more valuable means of communication between you and your contact, providing you with information that will differentiate your approach.
- Research prospects and clients to personalize approaches.
- Source insights that may be relevant in your industry, in general, or for a specific client or prospect. You will do most of your targeted insight research via a search engine but can certainly troll for new insights by watching for updates, news, white papers, research reports, and more from analysts or experts that research or report on your industry or your clients' industries.

Creating a Google Alert

1. Go to <http://www.google.com/alerts>.



2. In the **Search Query** entry box, type the search query you are interested in.
3. From the **Result Type** menu, choose what type of result you would like to receive.
4. From the **How Often** menu, choose how often you would like to receive the alert.
5. From the **How Many** menu, indicate how many results you would like.
6. Enter your e-mail address.
7. Click **Create Alert**.

A screenshot of the Google Alerts creation form. The form is titled "Alerts" in red. It contains the following fields and options:

- Search query: [text input box]
- Result type: [dropdown menu with "Everything" selected]
- How often: [dropdown menu with "Once a day" selected]
- How many: [dropdown menu with "Only the best results" selected]
- Your email: [text input box]
- [CREATE ALERT] button (red)
- [Manage your alerts] button (grey)

Your new Google Alert will not be activated until you confirm the alert by following the link in the e-mail Google sends to the e-mail address you provided.



Note: To learn more about Google Alerts, visit https://support.google.com/alerts/answer/175925?page=faq.html&ref_topic=28415&rd=1.

Establishing Alert Parameters: What to Search For

Google Alerts allows you to monitor customized search inquiries and filter the results. Your inquiries are your inquiries; this means that Google allows for complete customization. You can choose to set up a Google Alert on a specific prospect, a current client, your competition, your company, a specific industry, and even on you. You can indicate what results you are looking for, whether it is news, blogs, video, discussions, books, or a compilation of everything. You also have the option to choose how often you will receive Google Alerts. This can range from every day to once a week. You should set the frequency based on the critical nature of your prospecting effort. For example, you would set a daily frequency for your most important contacts. For a less critical effort, you may set “weekly” so you don’t inundate your e-mail inbox. It’s up to you.

Google Alert for today

From: **Google Alerts** <googlealerts-noreply@google.com>

[News](#) [Blogs](#) [Web](#)

News	10 new results for Business
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[Stocks tumble as government shutdown nears](#)
USA TODAY
Stocks were sharply lower on Wall Street as investors braced for a potential government shutdown. The Dow Jones industrial average was off about 100 points, or 0.7%, after being down more than 170 points earlier in the session. The benchmark Standard ...
[See all stories on this topic »](#)

When Google finds new results, Google will e-mail you an alert, providing you with insight and a deeper look into your contact.

Prospects

Creating a Google Alert on one or more of your contacts can aid your efforts in gleaning relevant information. You can use the information provided to you as a reason to reach out to your contact/client and add value by showing interest. You may also opt to create a Google Alert for your contact’s company for more information and trigger events. The intent is to use the information you gather to keep abreast of what your contacts are doing and to continue to build the relationship and establish credibility with them.

Google Alerts



An example of a Google Alert on a Contact:

Eric Smith works for a top medical device company specializing in cardiovascular medical devices required for surgery. He has created his Ideal Prospect Profile and is looking to build a relationship with his contact. His contact is Stephen Johnson, Chief of Cardiothoracic Surgery at the University of Chicago Hospital.

The screenshot shows the Google Alerts creation page. At the top, the word "Alerts" is written in red. Below it, there are several input fields and dropdown menus:

- Search query:** A text box containing the text "Stephen Johnson".
- Result type:** A dropdown menu with "News" selected.
- How often:** A dropdown menu with "Once a week" selected.
- How many:** A dropdown menu with "Only the best results" selected.
- Your email:** A text box containing the email address "ericsmith@gmail.com".

At the bottom of the form, there are two buttons: a red "CREATE ALERT" button and a grey "Manage your alerts" button.

Current Clients

Maintain healthy and lively relationships with your current clients by remaining in the loop with what they are up to. Nurture your relationships with your current clients to ensure their satisfaction and continue to build trust. Keep in mind that your current clients can often lead you to new contacts as well.

Competition

Remaining current with your competition is vital. Understand how to position yourself against your competitor, especially when you are in direct competition for a client. Stay top-of-mind, and stay several steps ahead of your competitors.



An Example of a Google Alert on Competition:

Eric is looking to keep tabs on his competition to see how he must position himself when he is faced head-to-head with his largest competitor, Stryker Corp., at a final presentation next week. Eric created his Google Alert around exactly what he wants to pay attention to.

The screenshot shows the Google Alerts creation form. At the top, the word "Alerts" is written in red. Below it, there are several input fields and dropdown menus:

- Search query:** A text box containing the text "Stryker Corporation".
- Result type:** A dropdown menu with "Everything" selected.
- How often:** A dropdown menu with "Once a day" selected.
- How many:** A dropdown menu with "Only the best results" selected.
- Your email:** A text box containing the email address "ericsmith@gmail.com".

At the bottom of the form, there are two buttons: a red button labeled "CREATE ALERT" and a grey button labeled "Manage your alerts".

Industry News

Follow industry news of your prospects and clients to deliver key insights. Having an inside look at industry trends and assessing the power they hold will enable you to consider the health of the industry many of your contacts are in — alongside recommendations and relevant material.

Google Alerts



An Example of a Google Alert on Industry News:

Eric must stay atop of what is occurring within the healthcare industry concerning medical devices — specifically cardiovascular medical devices. Innovative product development is occurring left and right within his industry, and Eric would like to know as much as possible to remain informed.

The screenshot shows the Google Alerts creation form. At the top, the word "Alerts" is written in red. Below it, there are five rows of input fields and dropdown menus:

- Search query:** A text box containing the text "Cardiovascular Medical Devices".
- Result type:** A dropdown menu with "Everything" selected.
- How often:** A dropdown menu with "As-it-happens" selected.
- How many:** A dropdown menu with "Only the best results" selected.
- Your email:** A text box containing the email address "ericsmith@gmail.com".

At the bottom of the form, there are two buttons: a red button labeled "CREATE ALERT" and a grey button labeled "Manage your alerts".

Insights

You can fish for new insights by closely following analysts, experts, and trusted sources and by watching for the release of news, white papers, research reports, findings, and other updates. These insights may shape your approach and guide your business intelligence for a particular contact.

Your Company

A Google Alert for your company ensures that you are rarely surprised by a prospect or client's question, opinion, and comment. Acquaint yourself with what your company stands for, its vision, and the work your company is regularly producing.

You

Manage your digital footprint, and avoid surprises. Know in advance what your prospects and clients will see before they search you. Familiarize yourself with the search results on you. Make yourself aware of your portrayal on the internet.

Prospecting and Insight Research

Google Alerts will provide you with information that will be relevant to your search inquiry, but you are still responsible for sifting through the relevant information to ensure that it best fits the communication between you and your contact. Keep your contact's needs in mind. Ask yourself what they would want to know, what they need to know, and what they would appreciate or value.

Based on what your Google Alert has sent you, how can you best relate to your prospect or current client? If you have an alert created for a main competitor, you should be narrowing your search results to any honors or awards your competitor is nominated for or receiving to see if you are in this same bracket and on the same playing field. You would pay close attention to news concerning acquisitions, mergers, new accounts, and new products or services.

Client and Company News/Announcements

Google Alerts allows you to pay specific attention to your contact's company and your client announcements. Current news will be provided to you via e-mail, which will ensure that you are up to date. Press releases, company news, and blog updates are helpful in aligning your selling process with that of your contact's organization.

Trigger Events

Identify changes in your contact's environment. These changes are commonly referred to as trigger events for they signify a need that your product or service may be able to address. With a need comes a hopeful opportunity, so take advantage. A common trigger event would be a company's change in strategy, such as their recent hire of new executives. Usually, when new executives are brought on board, existing vendors are swept away, making room for you and your product or service. Use Google Alerts to monitor trigger events within your target companies. Trigger events can guide relevancy and are known to cause new behaviors, new ideas, and new opportunities. Other examples of trigger events include change of ownership, such as a merger or acquisition, earned market share, new locations, and expansion, as well as new product or service launches.

