John Hancock Investment Management

LinkedIn Sales Navigator lead organization guide

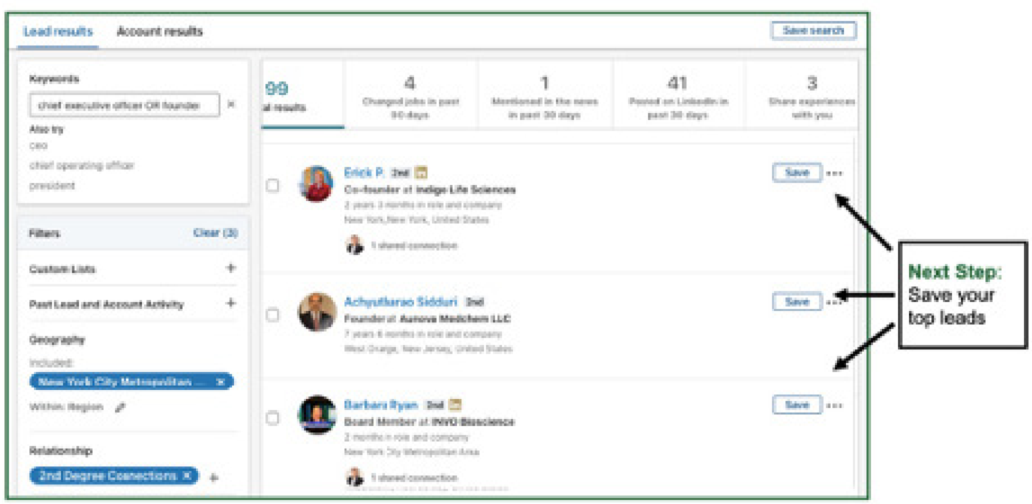
Directions

One of the best functionalities of LinkedIn Sales Navigator is the ability to save and track your leads. Follow the steps below to successfully save, organize, and track your leads.

Saving, organizing, and tracking leads—Sales Navigator prospecting workflow

Step 1: saving leads

After you've run a prospective client search on Sales Navigator, you'll see the option to **save your leads**. Saving your leads will add this person to your LinkedIn **Leads Lists** so that you can track and pursue them as a potential client. **Reference the screen shot below to see how to save your leads.**



Pro tip: You can **save multiple leads at once** by checking the box next to the left of the prospective clients' pictures and then selecting **"Save to list."**

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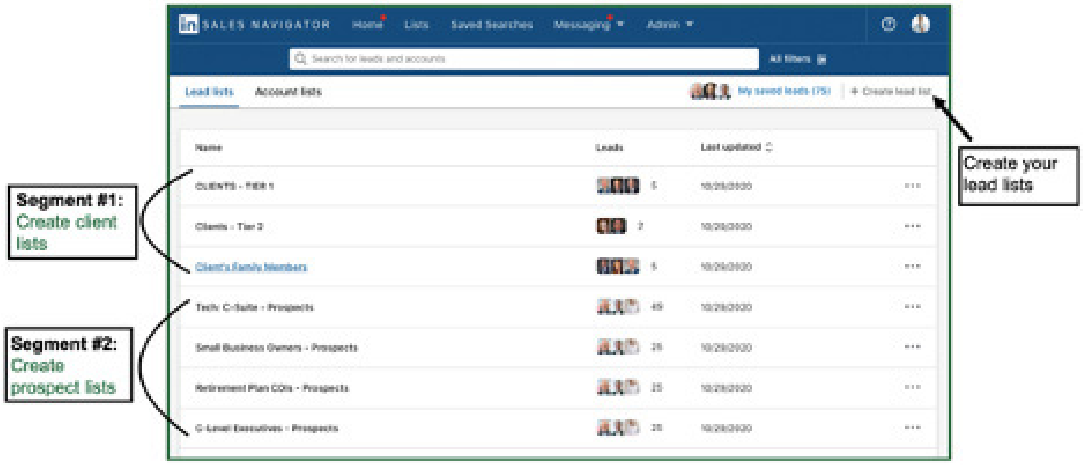
Step 2: organizing leads

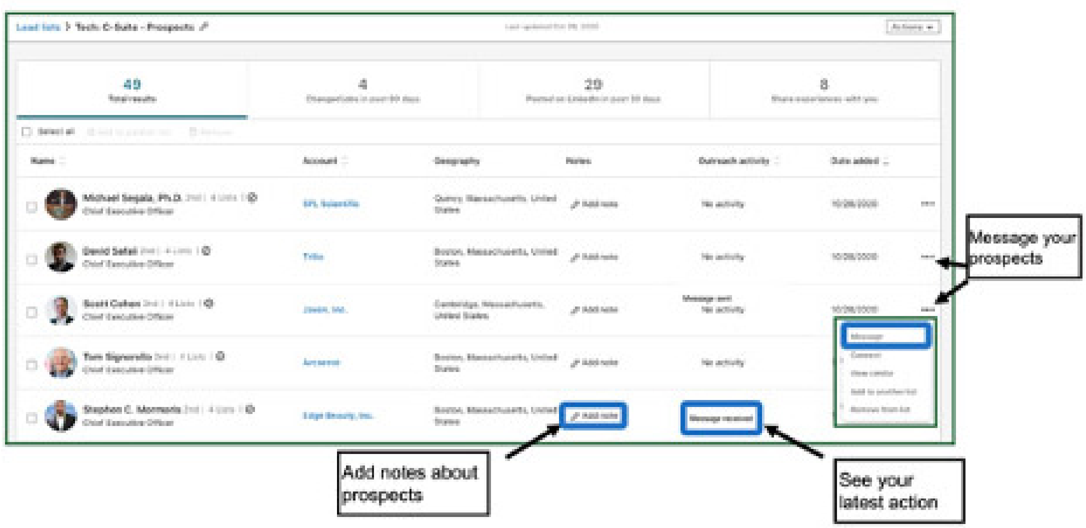
Once you've started saving leads, you'll then want to organize them into different prospective client groupings so that you can run smarter messaging campaigns in the future. Go to your **"Lists"** tab to find your Leads Lists. **Reference the screen shot below to see how top financial professionals are organizing their prospective clients.**



Pro tip: Top financial professionals are creating lists for prospective clients so that they monitor new leads while simultaneously deepening relationships with existing clients.

Step 3: tracking leads

Now that you've organized your leads into different groups, it's time to start running messaging campaigns and tracking your success. **Send messages** efficiently from a Leads List by clicking on the **three dots** on the far right of the screen next to your prospective client. **Reference the screen shot below to see how to send messages through lists.**



Pro tip: You'll also be able to see your **outreach activity** and **leave notes for each prospective client** on this screen. Use this to track each prospect's interest level.

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