John Hancock Investment Management

LinkedIn Sales Navigator advanced search guide

Directions

Your LinkedIn network is only as strong as the searches you run, the leads you save, and the connections you make. Use the steps below to learn how to find prospective clients in your target niche.

Sales Navigator search—master the essentials

Steps to jump-start your Sales Navigator search

1 From the LinkedIn Sales Navigator homepage, type **one search criteria** (i.e., CFO) into the search bar at the top center of your screen and then click **"Go"** to begin your search.

2 Click **"All Filters"** near the top right of the screen and you'll see a list of filters.

3 You'll see a number of **filters** you can use to improve your search and hone in on your target niche. Here are the **essential filters** to get your search started:

   a. **Keywords:** Select keywords for the type of prospective clients you'd like to find. Job titles (i.e., chief executive officer) can be some of the best keywords to leverage.

   b. **Geography:** Do you serve clients in a particular city or state? Use the geography filter to find prospective clients in your community.

   c. **Relationship:** Select "Second Degree Connections" to filter down to people who share a mutual connection with you. These will be your warmest leads.

   d. **Industry:** Do you have clients in a particular industry? Then you'll want to find more prospective clients like the clients you already have. Select your industry here.

   e. **School:** Want to find a fellow alumnus? Use this filter to find people who graduated from your university.

   f. **Past lead and account activity:** Want to eliminate prospective clients you've already saved? You can do that here by selecting "Remove saved leads from search."

4 After you select these essential filters, you'll have the ability to **search by clicking "Apply"** OR to **add more advanced filters**. To add more advanced filters, view the next page.

Sales Navigator search—master the advanced filters

Directions

The below search filters are only available on LinkedIn Sales Navigator. Use these filters to home in on the perfect prospective client for your business.

Advanced filters only available on LinkedIn Sales Navigator

a. **Seniority level:** Want to find people with investable assets? Search by seniority level to find prospective clients who are CXOs, owners, VPs, and directors.

b. **Years at current company:** Want to find a prospective client who recently started at a new company? Search prospective clients who have been in their role less than one year.

c. **Title:** Use this filter to search for prospective clients with specific job titles. Want to find the head of human resources or the VP of sales? Here's where to do it.

d. **Company:** Do you have a number of clients from one company? You can uncover more prospective clients at that company who your clients can connect you to.

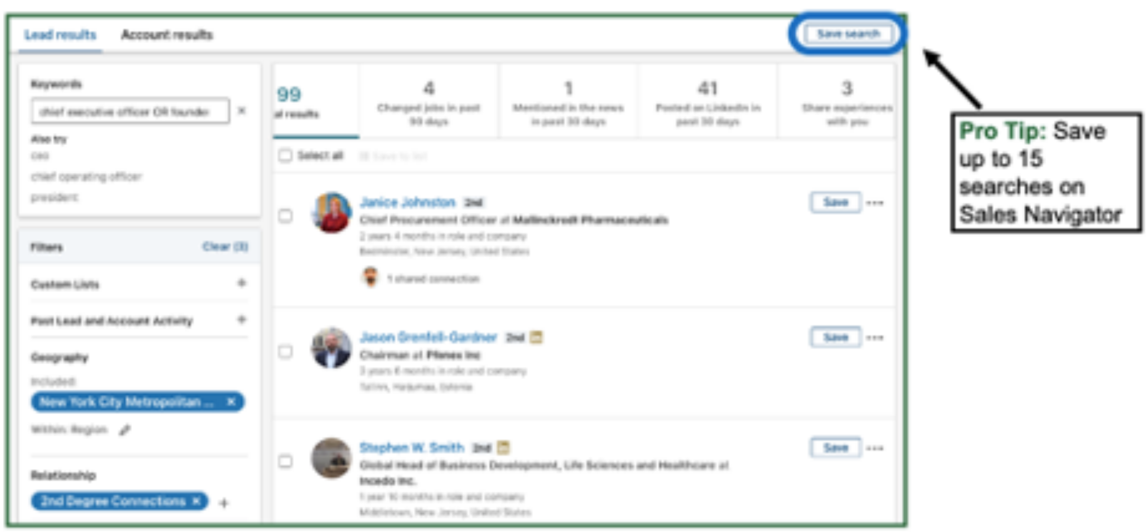
e. **Company headcount:** Do you want to find prospective clients at a startup or large corporation? Use this filter to find prospective clients based on company size.

f. **Past company:** Use this filter to find prospective clients who share your work history.

By leveraging these advanced Sales Navigator filters, you'll be able to zero in on prime prospective client opportunities. Once you've selected all the filters you want to use, hit **"Apply"** in the upper right-hand corner to run your search.

Pro tip—save your search and get email alerts

1 After you've run your search, you'll see a small box appear in the upper right-hand part of your screen that says **"Save search."** Click that button. (**Reference the screen shot below.**)



2 A box will pop up asking whether you want to get notified through email and how frequently you'd like to get alerts. Select your preference and then click **"Save."**

You now **have a saved search** and **will receive email reports with new prospective clients!**

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John Hancock Investment Management Distributors LLC, Member FINRA, SIPC, 200 Berkeley Street, Boston, MA, 02116
800-225-6020, jhinvestments.com