John Hancock Investment Management

LinkedIn Sales Navigator weekly checklist

Directions

Block out one hour on your calendar each week to complete the following seven tasks. By putting in one hour of focused work per week, you'll see your LinkedIn business grow exponentially with Sales Navigator. Keep in mind that LinkedIn Sales Navigator, like any prospecting method, is still a volume game. The more you focus on outbound activity, the better results you'll see. So, as you learn to move more efficiently through LinkedIn, you can connect more, message more, and expect better results.

1 **Have you connected with 10 new prospective clients this week?** ☐
Pro tip: Search by "Seniority Level" to find prospective clients in the C-suite.

2 **Have you saved 10 new prospective clients to your Leads Lists?** ☐
Pro tip: Save the same 10 prospective clients who you sent connection messages to track your leads.

3 **Have you sent 10 private messages to prospective clients this week?** ☐
Pro tip: Create different Lead Lists for each prospective client grouping and send relevant messages to each prospective client group all from one place.

4 **Have you shared at least one piece of content that's curated for your ideal prospective client?** ☐
Pro tip: Share a post unrelated to finance (i.e., client event, TED Talk, or podcast).

5 **Have you liked or commented on at least five pieces of your prospective clients' content?** ☐
Pro tip: View prospect content on your Sales Navigator homepage under "Alerts."

6 **Have you followed up with three prospective clients who haven't gotten back to you about meeting?** ☐
Pro tip: Go to "Lead Lists" and view "Outreach Activity" to see who hasn't replied.

7 **Have you organized all important leads that you want to stay on top of?** ☐
Pro tip: Use Sales Navigator to organize Lead Lists into different categories such as top clients and top prospective clients.

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