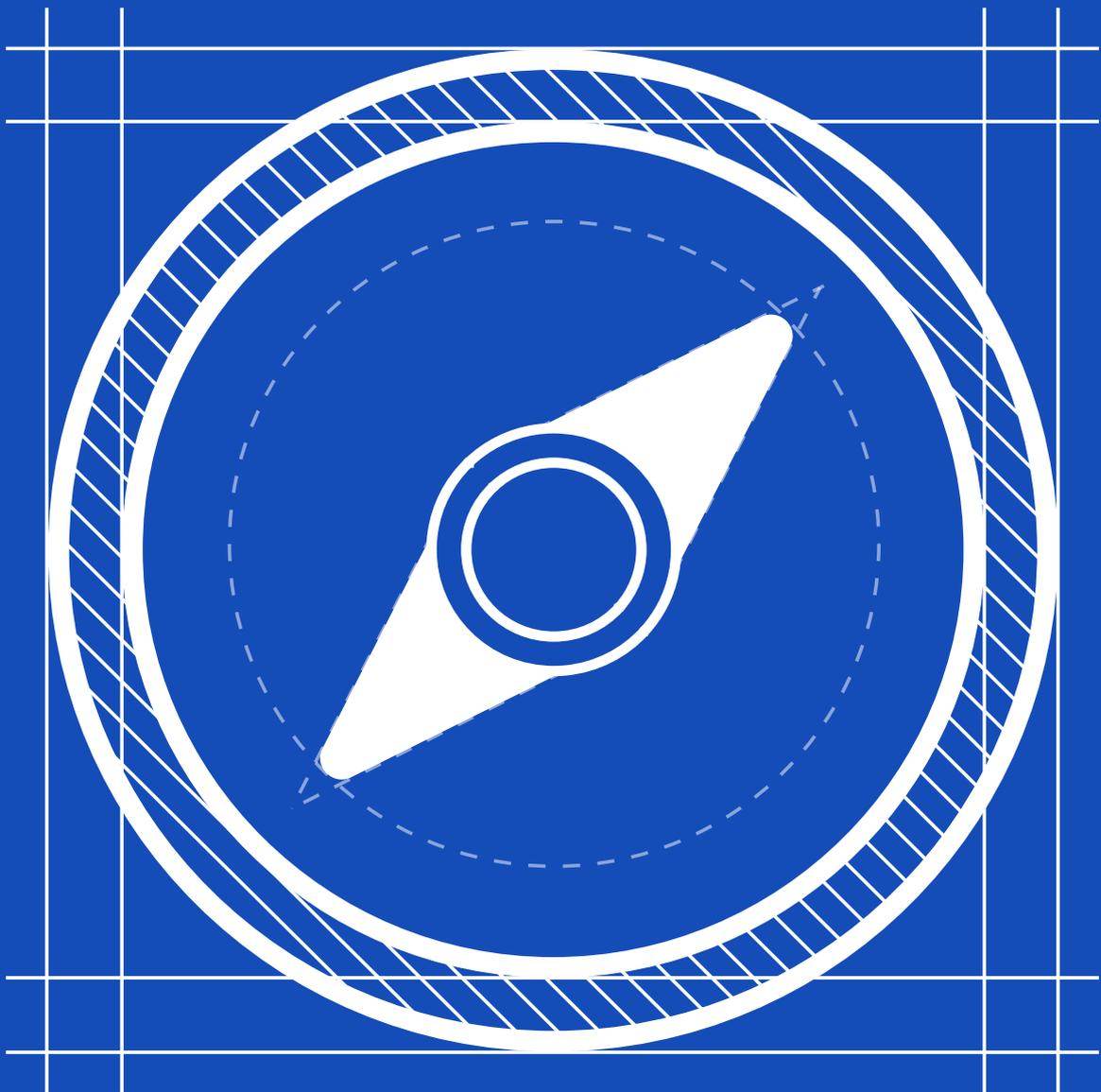




LinkedIn Sales Navigator Blueprint



Introduction

1

When it comes to LinkedIn lead generation, Sales Navigator is the best tool for easy and precise targeting. Its features enable you to filter the leads that match your Ideal Customer Profile.

2

The majority of Sales Navigator users don't utilise the tool to its full potential. Very few have a concrete workflow in place to best target potential prospects (leads).

3

Successful prospecting on LinkedIn comes from conducting a successful search on Sales Navigator and building your list. You need to be specific as targeting everyone quickly leads to diluted sales messages.

4

Qualification is key. It begins with gathering information during prospecting. The first step is to develop a profile of a qualified prospect, Look at patterns and commonalities among your best customers and develop a profile of the prospect that is most likely to do business with you.

5

This guide shows you how to use advanced tactics to make effective use of the tool. It will help you find B2B leads and build an audience directly from LinkedIn, to ensure maximum relevancy and gather data points to optimise further.

Ideal Customer Profile

This guide outlines tactics to use to get better results. Before searching on Sales Navigator you need to create a specific Ideal Customer Profile. If you have set this up already, please skip this step.

Think who your ideal client is, who they identify as or what kind of decision-makers are they (their job title) and the right keywords. Start by creating criteria for your Ideal Customer Profile of who you're going to reach out to:

- 1 The industry / Niche:
- 2 Their problem & challenge they're facing right now:
- 3 Their desired outcome:
- 4 Your solution:
- 5 Their location:
- 6 Company Size & Headcount:
- 7 Seniority level (Are they senior in their role or junior)
- 8 Keywords:
- 9 Seniority level / Job title:
- 10 Job function (what departments within the business are they mostly involved with):

Customer profile brings sharper focus to your targeting. Having a clear idea of what your ideal customer looks like today is the best way to make effective use of your prospecting efforts. A tip on Sales Navigator is you can do is search for one of your clients or a prospect that can be good for your business and click 'view similar' and this will bring up prospects who are similar to them.

The Basics (Top Filters)

KEYWORDS:

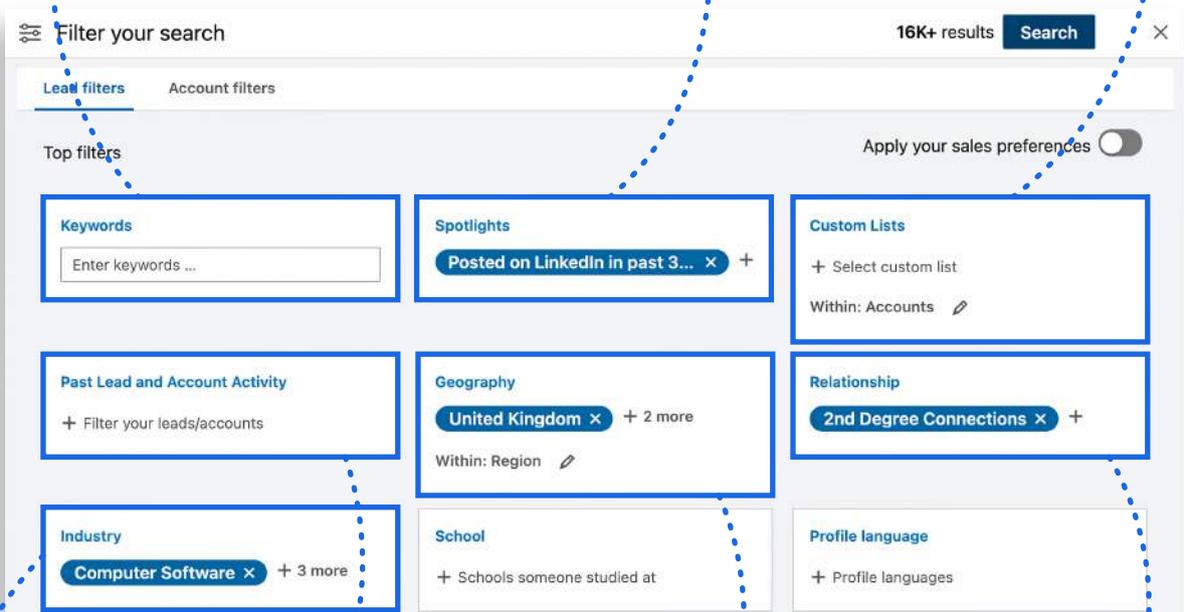
It searches for keywords that are in their LinkedIn profile. Keyword Modifiers help you expand and narrow your search to find prospects. In-depth explanation on page 5.

SPOTLIGHTS:

Leverage data on LinkedIn to segment search results to discover the prospects who are more likely to engage with you.

CUSTOM LISTS:

Organise your workflow and keep track of leads, accounts, and existing clients. Explanation on page 10.



PAST LEAD & ACCOUNT ACTIVITY:

Monitor prospects' activity to see if they've been active on the platform. The more active they are, the more likely to respond.

GEOGRAPHY:

Filter leads by adding locations, these are options like country, region, city, postal code or even company headquarters.

RELATIONSHIP:

Choose how closely you're connected. This is from 1st, 2nd, and 3rd Degree Connections as well as group members.

INDUSTRY:

Match this criteria to your customer persona to find the right target market. For example, if the majority of your target market is in Tech, you can choose 'Computer Software' or 'Information Technology'. Explanation on page 6 about why we *do not recommend* using this section.

The Basics (Other filters)

SENIORITY LEVEL, TITLE & FUNCTION:

With the 'Seniority Level', you can choose what position they are within the business. For example, Owner, Partner, CXO, VP, Director. This helps you narrow your search to the right people (decision-makers).

With 'Function', you can select what areas in the business they're most likely to be involved in. For example, Product, Marketing, Sales etc. This helps you especially when targeting bigger company sizes.

The screenshot shows the LinkedIn Sales Navigator filter interface. It is divided into two main sections: 'Role & tenure filters' and 'Company filters'. In the 'Role & tenure filters' section, there are six filter boxes: 'Seniority level' (with '+ Add seniority levels'), 'Years in current position' (with '+ Years in current position'), 'Years at current company' (with '+ Years working at current company'), 'Function' (with '+ Add functions'), 'Title' (with '+ Add titles' and 'Within: Current'), and 'Years of experience' (with '+ Years working in their field'). In the 'Company filters' section, there are three filter boxes: 'Company' (with '+ Companies or boolean' and 'Within: Current'), 'Company headcount' (with '+ Add range for employee count'), and 'Company type' (with '+ Add company types'). Additionally, there is a 'Past company' filter box with '+ Add past companies'. Blue dotted lines connect callout boxes to the 'Seniority level', 'Title', 'Function', 'Company', and 'Company headcount' filters.

COMPANY:

This is a specific search where you can filter the current company they're working for, as well as other options such as 'Past', 'Current or past' and 'Past not current'.

COMPANY HEADCOUNT:

Narrows down company size from SMB to Mid-Market to Enterprise accounts. This is important when choosing the right seniority level.

Advanced Search

When it comes to Sales Navigator, it's about hyper-targeting and being granular as possible because the more quality the original lead source is, the better the quality of leads you pull from it.

Boolean: keywords that would pull in the right prospect

To conduct an advanced search and utilise the lead filters, you start by using the "Keywords" function on Sales Navigator. This pulls any keyword that is on your ideal client's LinkedIn profile.

To make effective use of this function, you can run a Boolean search. A Boolean search is where you link keywords with operators such as AND, NOT, and OR.

Why use Boolean?

Using Boolean search helps you save time by preventing you from creating countless separate searches. It also helps you stop messaging the wrong types of leads who are not your ideal type of client.

For example, Marketing Agencies might be your target market, but you're main clients are Advertising Agencies, what's not your target market are SEO Agencies. On LinkedIn, there is a limit to the number of messages you can send a day. You don't want to waste those messages on people who do not match your Ideal Customer Profile. This can also waste time as you will manage responses with the wrong prospects which add up over time.

Here are some methods, tactics and examples to use LinkedIn’s Boolean logic to help you assemble an advanced search:

First, with every Boolean search, you start with open and close brackets. Set up like: **("Keyword" OPERATOR "Keyword")**. This is what it looks like:

(") **QUOTED SEARCHES:**
For an exact phrases, put the keyword quotation marks. Only use standard, straight quotation marks ("). No curly quotation marks (").

NOT **NOT SEARCHES (capital letters):**
Search terms to exclude from your search. Make sure NOT is in capital letters.

Keywords

("Marketing Agency" OR "Lead Generation Agency") NOT "SEO" NOT "SEM"

OR **OR SEARCHES (capital letters):**
See results that include one or more items in a list to broaden search results.

Keywords

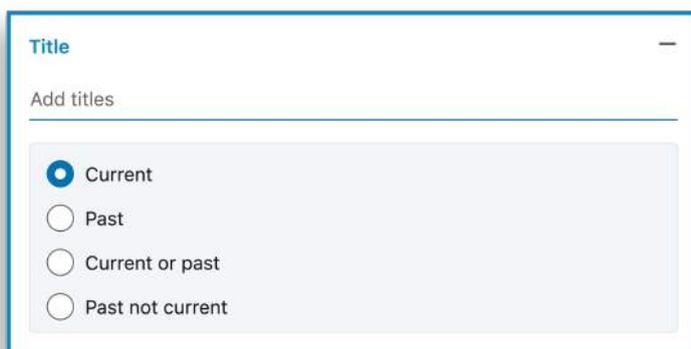
(("Advertising Agency" AND "PPC Agency") NOT "Organic")

AND **AND SEARCHES (capital letters):**
Results that include all items in a list, typically limits search results. If your search has two or more terms, you'll automatically see results that include all of them, AND may not be needed.

- NOTE:**
- The order that is considered being most important is: Quotes [""], Parentheses [()], NOT, AND, OR.
 - Make sure there are spaces before and after the operators. For example ("keyword" OR "keyword").

A big mistake a lot of people make is putting Job Titles in the "Keyword" section.

This leads to inaccurate results because when using keywords, you're pulling content from anywhere on their profile, their activity like their posts etc. Therefore, keywords are not great for targeting job titles. Instead, you use the boolean search on the "Title" section on Sales Navigator.



Title

Add titles

Current

Past

Current or past

Past not current

("owner" OR "founder" OR "ceo" OR "chief executive officer" OR "managing director" OR "president" OR "marketing director" OR "head of marketing" OR "business owner") NOT ("assistant" OR "personal" OR "executive" OR "interim" OR "finance" OR "financial" OR "human" OR "resources" OR "admin" OR "administrator" OR "hiring" OR "recruiter" OR "advisor")

Note: always write up your boolean search on a document, never on Sales Navigator. This is because there can be such issues as the internet refreshing and you losing the long search you spent time typing up.

Adding a Boolean Search to the "Keyword" and "Title" functions on Sales Navigator are vital to produce a specific and target list.

Combining filters (specific decision makers example)

Years of experience -

- Less than 1 year
- 1-2 years
- 3-5 years
- 6-10 years
- More than 10 years

Years of experience:

Choose the filters that have 3 + years of experience as they are more likely to have proof of concept, case studies and social proof. This is important because if they've been industry for a long period, you're aiming at more established businesses or someone who has had more 'skin in the game'.

Past lead and Account Activity:

Select 'Remove contacted leads from search' you don't want to contact someone you've already messaged, especially if when doing another campaign. Also, select 'removed saved leads from search' to make sure you're prospecting a fresh pool of potential leads.

Past Lead and Account Activity -

- Remove Saved Leads from search
- Remove viewed Leads from search
- Remove contacted Leads from search
- Search within Saved Accounts

Relationship -

- 1st Degree Connections
- 2nd Degree Connections
- Group members
- 3rd Degree+ Connections

Relationship:

Select '2nd Degree connections', as they will likely accept you compared to 3rd degree. The more 2nd-degree connection accept you, the more 3rd degree connections turn into 2nd. You can do 1st degree, depending on the type of list you're creating.

Company Headcount:

This varies depending on your Ideal Customer Profile as different people at different stages in business have different budgets, wants and needs. The majority of our users want shorter sales cycles, so for this instance, we'll target SMBs. Therefore, we'll want to target 1-10, 11-50 and 50-200.

Company headcount -

- Self-employed
- 1-10
- 11-50
- 51-200
- 201-500
- 501-1000
- 1001-5000
- 5001-10 000

Seniority level

- Owner
- Partner
- CXO
- VP
- Director
- Manager
- Senior
- Entry



Seniority level:

As we're targeting decision-makers, you want to target the Owner, CXO, Partner and VP. Keep it to that as the Boolean search on the 'Tile' section will do the rest of the work.

Geography

Add locations

- EMEA
- Europe
- MENA
- Nordics
- North America
- Oceania
- South America

Region

Postal code

Company Headquarters



Geography:

There is no limit to this, just simply choose the locations where most of your clients are located, where you or your team speaks their language and where you believe there can be opportunities.

Industry

Add industries

- Accounting
- Airlines/Aviation
- Alternative Dispute Resolution
- Alternative Medicine
- Animation
- Apparel & Fashion
- Architecture & Planning
- Arts & Crafts



Industry:

Some people like to choose this option, it still brings in search results. However, when putting industries on your search you're limiting the results as people do not update this often. The best practice is to leave this blank and focus on Boolean to do this part.



Keywords: [{"Marketing Agency" OR "Adverti"}]

Filters: Clear (6)

Spotlights: +

Custom Lists: +

Past Lead and Account Activity

Remove Saved Leads from se... x

Remove contacted Leads fro... x

Geography

Included: United Kingdom x, United States x

Within: Region

Relationship: +

Company: +

Industry: +

Company headcount

11-50 x, 201-500 x, 51-200 x

Seniority level

Included: CXO x, Owner x, Partner x

Function: +

Title

Included: ("owner" OR "founder" OR "... x

Within: Current

Years of experience

3-5 years x, 6-10 years x

View all filters

1K+ RE.

Quality over quantity. As you can see, combining these filters with Boolean provides you with a better quality list. Although it's a small result, these are more accurate prospects that match your Ideal Customer Profile.

Having a big search result on Sales Navigator is not ideal as the quality of the leads is not accurate compared to using a Boolean search.

Not having a targeted list can lead to sending a lot of messages to the wrong people, that's why the Boolean search is very powerful.

The most effective tactic is to create different variations of search results and start creating a list of Saved Searches (see next page).

How to create lists & Why they're useful

On Sales Navigator, there are two types of lists. A Saved Search and a Custom List. Custom lists are a process on Sales Navigator to organise your workflow and pipeline based on what's relevant to you. We recommend our clients and users to turn custom lists into a saved search.

Saved Search

Now you've conducted a search on Sales Navigator, you want to save the search criteria into lists of targeted leads. This is so you can quickly run that search again at any time and build lists for campaigns.

Must-Have Lists

- 1 1st Degree Connections.
- 2 2nd Degree Connections.
- 3 Groups.
- 4 Posted on LinkedIn in the past 30 days.
- 5 Account-based.

Must have lists

Name	New results	Created on
<List Name>	-	12/2/2021
<List Name>	214 new	11/30/2021
<List Name>	300 new	11/30/2021
<List Name>	364 new	11/30/2021
<List Name>	18 new	11/30/2021

1st Degree Connections:

This saved search list is where you leverage your current connections/ LinkedIn network. With the combination you've created, you select '1st Degree Connections' under the 'Relationship' section rather than '2nd Degree Connections'. These are potential leads that you're already connected with (no connection request is needed), therefore, they are more likely to respond.

2nd Degree Connections:

These are the list of leads that you will be doing the majority of your campaigns on. They are potential fits that you have not connected with yet and are not in your network.

This is a result of the combined and filtered searches that match your Ideal Customer Profile. Before saving the search, you need to analyse the results of the first 2-3 pages to see if they match your Ideal Customer Profile. You could also try the manual process of adding the best ones from that search to a Custom List.

Groups:

This is where you make effective use of the 'Groups' filter. Groups lets you know that the type of prospect you're targeting is actively searching and interested in certain information. You can use the type of group they're in for personalisation in your connection messages and follow-ups. Note, you don't have to be part of the group to find the leads.

Posted on LinkedIn in the past 30 days list:

This is a good quality lead list as these are people who have been active on LinkedIn the past month, meaning they're more likely to engage. As they're active and engaged on LinkedIn, they're more likely to check their inbox and see the messages that are being sent to them. You can create personalised messages for these types kinds of people.

Account-based:

If your Ideal Client Profile is more towards the bigger company sizes like mid-market or Enterprise Accounts(200+ company headcount), you can utilise the 'Account filters' tab on top of the Sales Navigator Lead Search box. This is where you can find Accounts and look for prospects that would direct you towards the decision-maker.

Create & schedule multiple campaigns with Salesflow

Save time and focus on what matters. Time is more valuable as it's truly the most limited. Salesflow helps you utilise Sales Navigator to help you gain leverage by getting yourself where you want to go faster, while you focus on the things that matter, which is generating appointments, closing deals and delivering results.

Sales Navigator is the foundation for your prospecting, build on your pipeline with Salesflow:

- 1 Import Your Saved Search from Sales Navigator**
- 2 Hyper Personalise your campaign messages. Automatically create multiple campaigns for the different market segments.**
- 3 Schedule unlimited follow-up messages. Auto follow-ups allow you to maximise your response rates & increase appointments.**
- 4 Gain access to smart & customisable inbox & chat. This is where you have the convenience of managing all your LinkedIn automation from one place. AI reply detection, advanced filters, tags.**
- 5 Get live key insights on your campaigns. Automatically create multiple campaigns for the different market segments.**

Why Salesflow?

LinkedIn has over 700+ million professionals and over 90+ million decisions actively on the platform. We enable you to take your personal LinkedIn profile and turn it into a lead converting sales machine. Our simple to use and advanced features enable you to automate and close deals faster.

Service-Driven Platform

With 7+ years of experience with LinkedIn Automation, we are your reliable technology partner that delivers.

Customer Success & Support

Dedicated support team to guide & onboard you through your automation journey for success. We're an established team with technical expertise in LinkedIn & Cloud-based Automation.

Easy To Use Platform You Will Love

Build your campaign in minutes with our intuitive & easy to use interface. It's simple, reliable & comprehensive navigation to get things done.

Growing International Team At Your Service

We're not just a SaaS but a service too with a global team servicing 4000+ users across 120+ countries with 3 international offices.

The safest and most effective tool for LinkedIn Automation to grow a qualified sales pipeline, fast. Built for Agencies, Sales Teams & Growing Start-ups.

Resources

- Pricing Plans
- ROI Calculator
- For Sales Teams
- Success Stories
- For Agencies
- For Growing Start Ups



Talk To Our Automation Experts