SALES NAVIGATOR

CHECKLIST

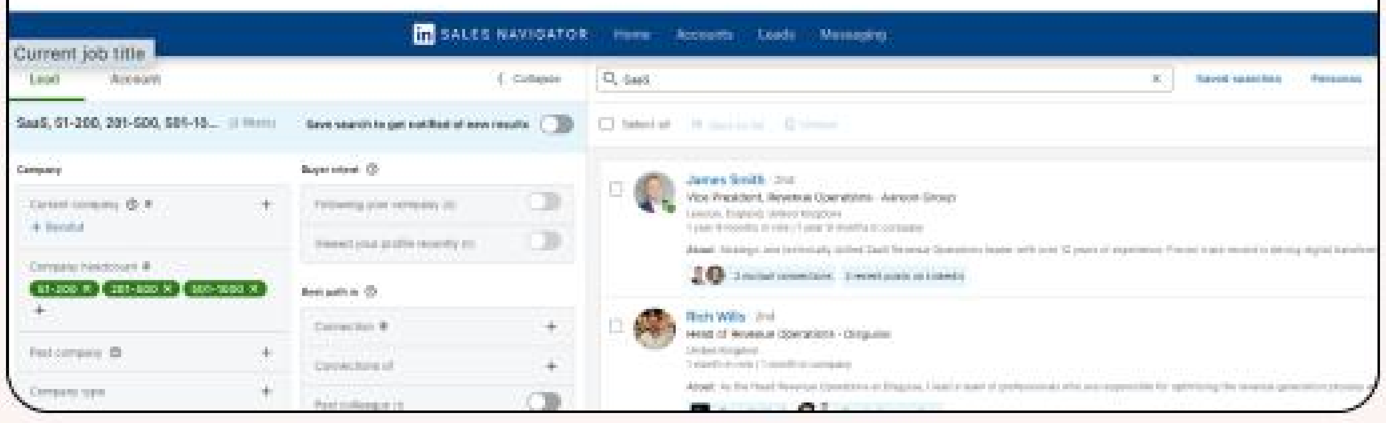
Intro

LinkedIn Sales Navigator is the upgraded version of LinkedIn, perfect if you know how to use it. It offers advanced search options to help you find and connect with potential customers. With Sales Navigator, you'll have more conversations with potential clients and build better relationships.
The Best Searches are:

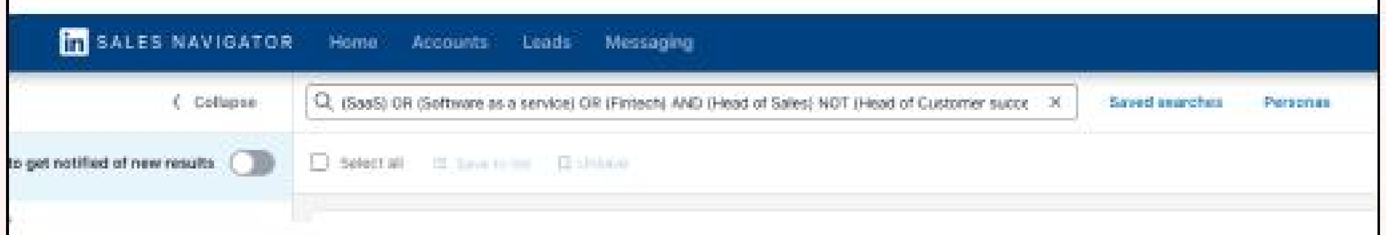
#1 - Advanced Search:

When using advanced search, you have several filters at your disposal:

- **Keywords:** Use relevant keywords found in your prospects' profiles.
- **Geography:** Specify a location if you're targeting prospects in a specific area, such as where your own office is located.
- **Title:** Narrow down your search by the position, whether it's CEOs, hiring managers, or both.
- **Company Size:** Define whether you're interested in startups or larger corporations based on your target audience.



#2 - Boolean Searches:

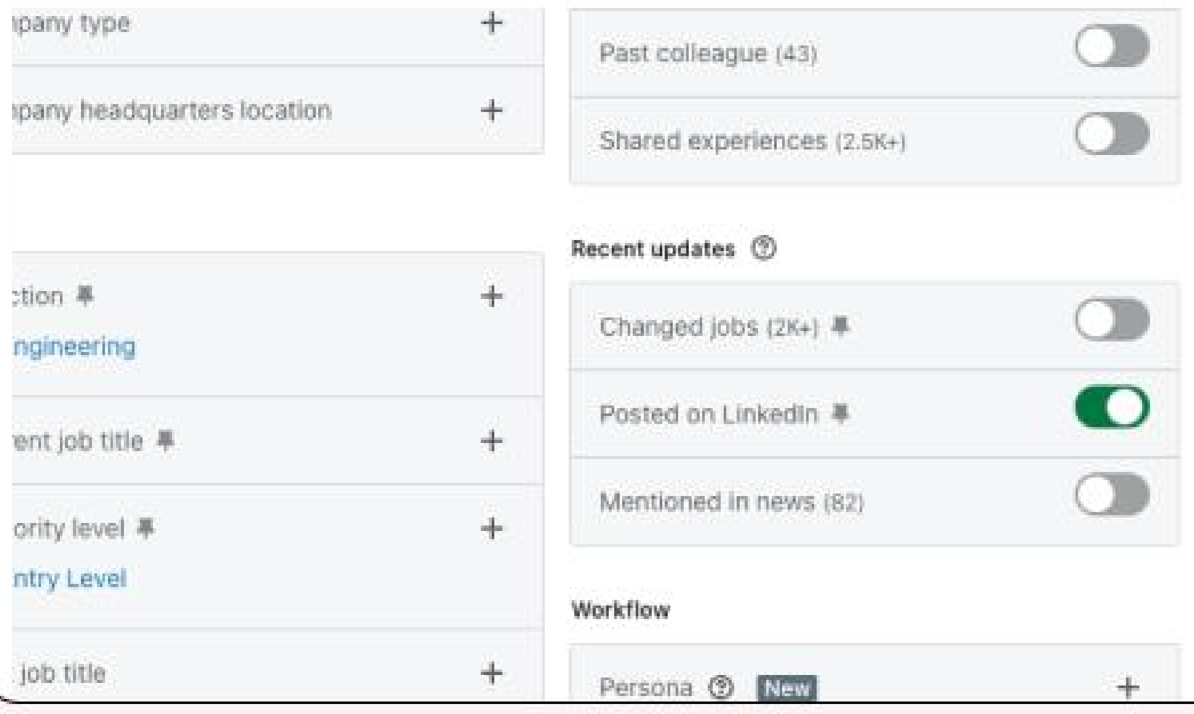


You can perform Boolean searches on Sales Navigator by combining keywords with operators like AND, NOT, and OR:

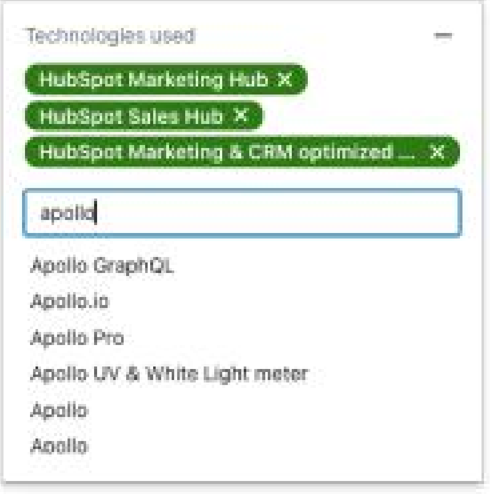
- **Quoted Search:** Use quotation marks for exact phrases, such as "sales manager".
- **NOT Searches:** Exclude specific terms from your results with the NOT operator, like "sales NOT manager".
- **OR Searches:** Find results that include one or more items from a list, for instance, "sales OR marketing OR advertising".
- **AND Searches:** Locate results that include all items in a list, such as "accountant AND finance AND CPA".

#3 - Posted on LinkedIn:

Utilise this filter to discover content posted by potential buyers. This filter is accessible within the advanced LinkedIn Sales Navigator search.



#4 - Technology Used:



- Identify companies that use specific software or technology, such as those integrating with Hubspot.
- Conduct this search in "Account Sales Navigator" using typical filters like location and company size, alongside a buyer signal (e.g., companies using Salesforce) for hyper-targeted results.

To find decision-makers within these companies:

- Select all relevant companies and click on "View Employees" in Sales Navigator to access a list of all employees within those specific companies.
- Apply additional filters to pinpoint decision makers, ensuring you're reaching out to the right contacts.

By leveraging these search methods effectively, you can refine your outreach strategy and connect with your ideal prospects on LinkedIn.

Essential steps:

- Save Searches: Saving searches saves time – you'll be running multiple LinkedIn Sales Navigator searches. It's a pain to enter the same search terms repeatedly for different campaigns. Fortunately, you can save your searches and return to them later to continue where you left off.

- Set Your Sales Preferences: Sales preferences are criteria you set so that Sales Navigator shows you relevant leads based on region, industry, function, seniority level, and more.

- Warm Up Your LinkedIn Profile: Start gradually by sending up to 10 connection requests per day and regularly monitor your account. After about two weeks, you can gradually increase your requests if everything is going well.

- Optimise and Update Your LinkedIn Profile Before Outreach: Before reaching out, make sure to optimise your LinkedIn profile. People are more likely to accept requests from those with common interests. Ensure your tagline and summary showcase your personality.

COPYWRITING

CHECKLIST

#1- Niche

- **Identify the companies and personas you target, broken down into firmographic and demographic data:**
  - Job title
  - Day-to-day duties
  - Industry
  - Location
  - Company size
  - Revenue
  - Niche keywords
- **Targeting everyone with a general offer dilutes your copy, making it unappealing to anyone.**

#2- Pain point

- **Understand that people buy to solve problems and achieve desired outcomes, not for features.**
  - Highlight the challenge and provide specifics.
  - Explain why the challenge is an issue and the pain points it brings.
  - Show the consequences of continuing in the old way, focusing on time and cost.
- **Hook: Capture attention within 2-3 seconds:**
  - Pattern interrupt: Use something unexpected or different to stand out.
  - Techniques: Storytelling, creative openings, humour, unconventional formatting, contrast/contradiction.
- **Personalisation and Relevance:**
  - Inject personality: Add relatable stories, informal language, or a touch of humour.
  - Avoid jargon/buzzwords: Keep the message straightforward.
  - Keep it concise: Focus on brevity and clarity.

#3- Solution

- **Clearly state what you offer and the results your customer gets:**
  - Be specific about the desired dream outcome.
  - Show why you are unique.
- **Explain the tangible benefits of your product/service:**
  - Help prospects see the positive change your product/service brings.
- **Highlight why your approach is the best:**
  - Emphasise the best method to move from point A to point B, whether economic or emotional.

#4 - Credibility:

- **Build trust with social proof:**
  - Testimonials, positive reviews, success stories, endorsements.
  - Show the cause-effect relationship between your solution and the customer's positive outcome.
- **Name-drop companies you've worked with:**
  - Add success metrics and stats on what customers achieved.
  - Invite prospects to see social proof on your website.

#5 - CTA:

- **Plan a strong call to action:**
  - Ensure it is clear, easy to understand, not overcomplicated, and involves only one ask.
  - Provide a "what's in it for me" aspect to entice action.
- **Make the CTA compelling and intriguing. Examples of effective CTAs:**
  - “Simple walkthrough on how you can do X by doing X”
  - “An action plan to show how X will get the results”
  - “Review market opportunity and how it can you with X”
  - “Brief 30-minute conversation to show the right strategies to take advantage of X”
  - “Short product tour to show how it can solve X problem”

The money is in the follow-up:

- **Avoid bland follow-up messages like "thoughts?" or "checking in." They don't cut it.**
- **Five effective strategies you can use:**
  - Don't let your initial message go to waste—rewrite it and send it again.
  - Grab attention with a different opening line or subject.
  - Add a touch of humor to your follow-up—memes and jokes can work wonders.
  - Limit yourself to 2-3 follow-ups max; being overly persistent can backfire. If you still don't get a response, give it a break and try again in a month

EMAIL DELIVERABILITY

CHECKLIST

Data & Emails 🕵️

- Avoid using outdated databases. Instead, utilise LinkedIn Sales Navigator and an email finder to keep lists current and minimise errors like
- “FirstName is no longer with the company.”
- Verify all emails to ensure accuracy.
- Remove invalid and risky emails.
- Double-check catch-all emails.
- Favorite tools: Clay and Hunter.

Contact Lists 📝

- Verify the First Name field to avoid robotic greetings (e.g., “hi john” or “hi 🚀John”).
- Ensure the first letter is capitalised.
- Avoid using emojis.
- Exclude Last Name from greetings.
- Validate the Company Name field, removing legal suffixes like “Ltd,” “Inc,” “LLC,” “GmbH,” etc.
- Eliminate generic emails (e.g., info, sales, contact).
- Remove invalid emails.
- Exclude the following from your list:
  - Existing customers
  - Open opportunities
  - Contacts who opted out previously
  - Partners, competitors, etc.

Prepare Domain for Cold Outreach 🔗

- Use your main domain for inbound leads (e.g., trials, demo requests) and bridge-bound leads (e.g., PDF downloads, re-engagement of lost deals).
- Set up a new domain and email addresses for outbound cold outreach.
- Gradually increase daily sending limits to warm up the domain.
- Send test emails to colleagues and friends, asking them to reply to boost domain and inbox reputation.
- Check your spam score using tools like mail-tester.com.

Email Personalization ✍️

- Go beyond basic personalization (e.g., {{FirstName}}, {{Company}}) by including:
  - {{Industry}}
  - {{JobTitle}}
  - {{Location}}
  - AI-generated or manually researched P.S. snippets or intro lines
- Do not fake personalization.
- Use intent data for outreach reasons (e.g., new hires, use of specific tools, LinkedIn posts).
- Implement fallback variables, spintax, and liquid syntax to create unique emails.
- Personalize follow-up emails with relevant content and insights.

Email Templates 📧

- Avoid selling in the initial cold email; be polite and tactful.
- Don’t ask for time right away; aim to reveal interest.
- Keep emails concise (50-70 words; maximum 100-120 words).
- Use polite language and avoid strong CTAs.
- Structure your email with the following blocks:
  - Greeting
  - Intro
  - Reason for Outreach
  - Value Proposition
  - CTA
  - Signature
  - P.S. Sentence
- Avoid multiple questions or asks; focus on one simple action.
- Use soft CTAs that are low-friction and interest-based.
- Talk about the recipient and maintain favourable ratios (e.g., I: You, Your Company: Their Company).
- Keep initial emails free of additional content (e.g., links, GIFs, PDFs, attachments, images).
- Ensure email length is manageable, using 3-5 paragraphs max.
- Always A/B-test different elements (intros, reasons for outreach, value propositions, CTAs).

Subject Lines 🗒️

- Keep subject lines short (1-5 words) and mobile-friendly.
- Avoid empty subject lines.
- Use any case except all lowercase.
- Do not use CAPS LOCK.
- Numbers can be used for social proof.
- Avoid emojis.

Email Deliverability & Technical Setup 🚥

- Implement technical changes (e.g., SPF, DKIM, DMARC, PTR, MX, A records).
- Check the age and reputation of your domain and email addresses.
- Use mail testers and branded links.
- Maintain a healthy inbound/outbound email ratio.
- Ensure your domain is not blacklisted and has a low spam rate.
- Warm up email inboxes gradually and monitor open rates.
- Avoid sending bulk emails too quickly to prevent spam detection.
- Make it easy for recipients to opt-out to avoid being marked as spam.
- Use email tracking judiciously; avoid using short link services and broken links.

Planning and Analysis 📝

- A/B test everything: subject lines, templates, CTAs, ICPs, sequences, schedules.
- Send initial emails on Tuesday-Thursday; use other weekdays for follow-ups.
- Add city and country variables for timezone-specific scheduling.
- Get feedback from your company’s buyer persona to ensure the email resonates.
- Focus on the interest rate (positive responses vs. sent emails) rather than open and reply rates.
- Keep the bounce rate low (3-5% is acceptable).
- Continually analyze stats and innovate your personalization techniques.