

Who to Who Sales Toolkit

Warm Introductions & LinkedIn



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Warm Introductions (Not Referrals)

This step applies to Desired relationships.

If polled, most business people would say the the #1 source for business is referrals. These are opportunities that occur because someone who already trusts you connects you with someone they think would benefit from what you offer.

**Cold calling =
5% - 10% return
on effort.**

Referrals work well because there is already a pre-established level of trust with the new person you are meeting. Someone they trust facilitated the connection; *“If Susan trusts you I’ll at least take the meeting.”*

**Introductions =
40% - 50% plus
return on effort.**

There are a couple of ways referrals can occur. One is to hope someone gives you a referral. The belief here is that if you keep your existing customers happy, then they’ll think of you when someone they know has a need for your products or services.

Another approach is to ask for a referral – *“Do you know anyone that could use my services?”* This is often asked at the end of a meeting as you leave someone’s office.

These hope-ask approaches to referrals produce limited results and sometimes do not work at all. The reason is these approaches ask your contact to think about you and how you might help someone they know. In essence, you’re asking your customers to be your salesforce. This can put

someone on the defensive or catch her by surprise when it is out of context. Mostly, though, it is not their responsibility to help you sell.

In contrast to using hope/ask and shifting the responsibility to your customer, take control of connecting with the people you want to meet. Instead of thinking about referrals to people unknown to you, think about how to get introductions to people you've identified and want to meet.

Leveraging Intelligence for Warm Introductions

You've identified the people you want to meet. You've researched the people you want to meet. The task now is to find the path to a warm introduction.

Your research may make that path self-evident. There is possibly someone you already know off the top of your head who is, in some way, connected to the person you want to meet. Or, their name may have shown up in the research.

Also consider checking with your internal people — it's surprising how often you find someone who knows one of your Desired people. Maybe they play golf, attend community meetings, or go to church together. You'll never find these little gems if people don't know who you'd like to meet. When you have good relationships with internal people, it's easy to ask if they know any of the people you want to meet.

If there is not an immediately identifiable connection, then use LinkedIn. LinkedIn is your #1 tool for identifying a path to a warm introduction. LinkedIn profiles not only tell you something about the person, LinkedIn

also tells you if/how you are connected to someone. In this way, LinkedIn identifies the path to the Desired person.

The prerequisite, of course, is that you are on LinkedIn and have a robust profile and network of connections. If you're not on LinkedIn, It will pay off if you need to rectify this immediately. Determine if your LinkedIn presence is where you need it to be. When your LinkedIn presence is solid you can effectively leverage LinkedIn to identify the path to a warm introduction.

For help with your LinkedIn presence, refer to the LinkedIn Tutorial and LinkedIn Checklist at the end of this section.

Using LinkedIn



Enter the name of the person you want to meet into the search box on LinkedIn. Once you identify them in the search results, click on their profile and scroll down to the section that identifies the individuals through whom you have a shared connection. Someone in that group of individuals is your path to a warm introduction.

Variation: Search a company name for all employees on LinkedIn. Identify a decision maker you would like to meet. Click on their profile and see how you are connected.

Variation: Search the connections of your connections. If your 1st levels are quality connections, they would likely help with a warm introduction, if asked.

Get an Introduction (not a referral)

So step #1 is done - you know how you are connected to your desired relationship; you've identified a path to a warm introduction.

Step 2 is to ask for the introduction. Before asking introduction, make sure you have a clear reason behind your request. Why do you want to connect? When asking for a warm introduction you are asking someone to put his or her relationship and the trust they've established on the line for you. They deserve to know your intentions.

Once you have clarity about why, you can ask for help with a warm introduction. When asking keep it simple. Do not put your connector to work. Rather, simply ask permission with a very specific close-ended question:

"I see you know so-and-so at ABC Company. I would like to meet him/her for the following reasons... Would you mind if I used your name in reaching out to them?"

It is that simple. You simply explain why and ask permission to use their name.

The goals with this approach are:

- You keep responsibility on your own shoulders; your relationships are not your salespeople.
- Be clear and offer why you want to connect with someone
- Respect the trust someone else has established in their relationship

To summarize, focus on proactive warm introductions instead of happenstance referrals.

To recap:

- Begin with who. From your Relationship Matrices select the desired relationships you want to meet.
- Have a why. Demonstrate respect for the relationship your connector has with the person you want to meet.
- Make the how easy. Here's who I want to meet; here's why I want to meet them; may I use your name?

When you meet: Focus on building a relationship and trust; don't tell and sell coming right out of the gate. Demonstrate to your connector that you value your relationship with them, and will take care in this new relationship as well.

Lastly, keep the connector informed. Let them know their relationship is well cared for and you appreciate the warm connection.

LinkedIn Tutorial

Executive Summary

LinkedIn is a tool that enables you to find other people you might want to connect with, to profile yourself so people can connect with you, and to participate in groups of like-minded professionals who share some commonality.

Become a member of LinkedIn. A personal page is free. LinkedIn is a closed community. Without membership you cannot participate.

Have a strategy for using LinkedIn. Work your strategy at least once a week.

Complete your Profile. Ensure the content in your Profile reflects the message and brand you want to project about yourself.

Build first level contacts that are robust enough to get you access far into the LinkedIn database of members. My suggested minimum number of first level contacts is about 250.

Hold at bay any hope that LinkedIn is the answer to all of your connection-making goals. It is not. You still need to connect with people in person and build a relationship. A virtual connection is not a relationship.

Participate in groups or start your own group. Participation connects you with business leaders and enhances your opportunity to derive value from LinkedIn.

What follows are more details and information about LinkedIn and how to use it to your advantage. This tutorial is by no means complete. There are books out there that are much more complete than these few pages. What you will get here are some insights, suggestions and tips for getting started and making LinkedIn work better for you.

What is LinkedIn?

LinkedIn is a networking site biased towards professionals. It is a tool that enables you to find other people you might want to connect with, to profile yourself so people can connect with you, and to participate in groups of like-minded professionals who share some commonality.

What LinkedIn is Not

LinkedIn is not a social networking site in the same vein as Facebook. LinkedIn is populated by professionals, and the content, discussions and postings are almost exclusively business and professionally oriented. The features and functionality of LinkedIn are not slanted to the conversational, *“here’s what I did today”* atmosphere most often associated with Facebook, Instagram, and other social networking platforms.

What are some benefits of LinkedIn?

The ability to be known – People on LinkedIn can get to know you, but it requires you to participate. Exchange emails, post articles, participate in blogs, or give answers to posted questions. How you participate, what you contribute, and the netiquette you use will define your brand – who you are – for others.

The ability to be found – The starting point for being found is your Profile. Your Profile defines you on LinkedIn. Therefore, make sure your Profile shares the information about you that you want others to know. FYI, on Google searches on your name, your LinkedIn profile will almost always be at or near the top of the results. When someone clicks on your Profile does it tell the story you want told?

The ability to find others – LinkedIn is a connection-making site first and foremost. Through LinkedIn you can connect with others. To do this requires you to reach out to people you know or want to know. You need to build a network of contacts on LinkedIn if you want the power of the database to work for you. My suggested threshold for sufficient reach into the database is 250 contacts.

The opportunity to learn and share – You can participate in information and knowledge through LinkedIn. In the broad community you can participate in blogs and provide answers to posted questions. In groups you can share articles and information.

What to Expect with LinkedIn

LinkedIn is not your every answer to being connected. Remember, it is just a tool, a framework of technical functionality that facilitates connections. Like any tool, it is useless unless used, and it needs to be used appropriately.

To make LinkedIn work for you, you need to do some basics:

- Complete a Profile
- Extend invitations to connect
- Visit the site regularly – at least once per week

If you do these three things you will have the foundation in place to make LinkedIn an effective tool for yourself.

Account and Settings

At the top right of each LinkedIn page is an Account & Settings link. This is your gateway to levels of features, functionality, and notifications from LinkedIn. Accounts come in several categories from Personal (free) to various Business Levels (\$59.95 per month), Sales Navigator, to over \$500 per month for Corporate).

The Personal Account enables you to publish a Profile, build a network, participate in groups, and post to blogs, provide answers, and share articles and information.

The Sales Navigator Level opens up considerable search capabilities and some enhanced connection making capabilities. The search capabilities include multi-levels of variables upon which you can search out people. These include geography, industry, company, title, income, interests, and more. If you plan on using LinkedIn for connection making and marketing purposes (and you should), then this level of membership is worth considering.

Confidentiality

You control the level of confidentiality you want on LinkedIn. The control is in the Settings you select. You can restrict access to your connections. You can limit the information displayed in your Profile. Bear in mind that the more you restrict, the more you defeat the purpose of LinkedIn – to connect to people and share information.

Your Networking Strategy

Your strategy basically answers the question – why am I on LinkedIn? The answer to this is not just one thing. You could be looking to build a local network. You could be looking for a job. You could be looking for employees. You could be looking for others who have an interest in wine. You could want to connect with everyone in a certain group or club. All are viable strategies, and they can run simultaneously. Why you are on LinkedIn will guide your strategy for connecting.

The strongest strategy for LinkedIn is a marketing one. LinkedIn is the new rolodex. You can see the connections of every first level connection you have. If your first level connections are quality, meaning you know the people and they would take your phone call, then you can get warm introductions to their connections. More on this in a moment.

Other marketing aspects in LinkedIn are the groups you join, postings you do, and comments you make. All of these activities lend themselves to establishing your expertise and furthering a strategy of thought leadership in your areas of expertise.

Kevin Bacon

Kevin Bacon is the common vernacular for understanding the concept of six degrees of separation. On LinkedIn it is probably closer to three degrees of separation from anyone. Building a strong first level of contacts – people you directly invite to connect with – expands the reach of your network. It's a cascading effect. The more first degree contacts you have, the more likely people you want to connect with can be found quickly.

Searching and Connecting – Warm Introductions

At the top of each page is a Search Box. You can search by people, jobs, answers, companies and groups. Enter the name of someone you want to find, being as specific as possible. Search results will be listed and next to listing will be a 1st, 2nd, or 3rd degree of contact indicator. This shows how far you are from a personal connection to that person – how many degrees of separation. To connect with this person, you can send them an invitation directly, or make the connection more personalized by connecting through the people you have in common.

I recommend sending a personalized invitation to connect, referencing the person you have in common. But first, make sure the person you have in common gives you permission to use their name. That makes the invitation “warm”. You are being connected by someone you both know. Just click on the person’s profile link and you will see an “Invite to Connect” link. Clicking on that gives you the opportunity to write a personalized message (referencing your common connection).

LinkedIn Checklist

How to Get the Most Value from LinkedIn

A common question is...."so I signed up on LinkedIn, but I don't know what I'm supposed to do with it. Does it have any value?"

The answer to "does it have value" is yes, and that value is strongest in sales and marketing. As with most things though, it requires more than just "signing up." You have to put some up front effort into it and then you have to keep working it. But when you do, you can use it in the following valuable ways:

- **Prospecting.** You can locate and introduce yourself to contacts in the accounts you are targeting. You can learn a lot about your prospect by reading their profile (what they're currently working on, their employment history, who they recommend and who recommends them, where they went to school, their personal interests, etc.)
- **Search Engine Optimization (SEO).** Having a COMPLETE profile on LinkedIn will drastically improve your SEO results. You can include up to three URLs in your profile that are indexed by Google and other search engines, as well as create your own LinkedIn URL that is searchable.
- **Recruiting and Reference Checks.** If you are hiring LinkedIn can help. Not only can you search for positions and candidates on LinkedIn, you can verify job experience and contact other contacts within LinkedIn who were at the company during the same time for references.
- **Thought Leadership.** If you are trying to establish yourself or your company as thought leaders, you can answer questions in the Q&A section of the site. You can also post your own articles, white papers, blog links etc.

LinkedIn can be a very powerful business networking tool--one that no sales or marketing person should be without. LinkedIn does have several membership levels, ranging from free to \$500/yr, so evaluate the one that makes the most sense for you and go for it.

TIP: Use this checklist to develop your LinkedIn profile and take advantage of its value! There are even more advanced ways to work the LinkedIn network, but this checklist will get you well on your way to becoming a power user.

✓	CREATE YOUR PROFILE: The main thing you must remember when creating your profile is that it must be COMPLETE. Users with complete profiles are 40 times more likely to receive opportunities through LinkedIn.		
□	Join LinkedIn and complete the overview information	Make sure you include all the emails you use (personal and professional) as this is how other LinkedIn users you know will find you.	
□	Complete employment and education history	Be as complete and accurate as possible. This is how colleagues and friends will search and find you...and how potential business partners will evaluate you in their search for customers and vendors.	
□	Add a profile summary	This is a great way to profile what your company does and what you do in it. In other words, tell your story.	
□	Add your website(s)	Choose the "OTHER" setting so that you can name the links (better for SEO).	
□	Create Public Profile URL	Use your name in the LinkedIn public URL you set for your profile.	
✓	CONNECT AND RECOMMEND		
□	Connect with the people you know	<p>Review your contact database and invite people you know to connect via LinkedIn. The best way to do this is to include as personal a message as possible! This may take a little more time, but it is well worth it, as it improves the response of those who accept your connections, as well as improves the quality of the connection itself.</p> <p>This is an ongoing task that needs to be redone every month or so.</p>	

NOTE: Be somewhat selective about the direct connections you make. While you do want to make as many connections as possible, those connections are really only valuable to you if you know something about each other. If you accept connections from LinkedIn users you know nothing about and you don't make an effort to first determine the "value" of the connection before accepting the invitation, it will only make your system more unmanageable and therefore less valuable.

✓ COMMENT AND POST				
<input type="checkbox"/>	Regularly monitor the Updates section for articles, comments and updates to which you are uniquely able to contribute	Thought Leadership is one of your greatest sales and marketing tools. LinkedIn users have the ability to demonstrate your expertise by posting your comments and insights. Monitor your Updates and when an article or posting is of interest, add your expertise. If possible, demonstrate your uniqueness through your comments and experience.		
<input type="checkbox"/>	Post articles, either your own or ones of interest that you forward to the LinkedIn community.	Posting information of value elevates your position as a thought leader. It enables you to demonstrate your knowledge and expertise. Also, the more posts you make the more times you appear in searches and become noticed. Posting is a great accelerator for your SEO efforts on LinkedIn and Google.		
✓ JOIN GROUPS				
<input type="checkbox"/>	Identify networking groups within LinkedIn	LinkedIn offers a platform for groups of like interests to connect. Some of the associations you already belong to may already be on LinkedIn. You can search the directory within LinkedIn to see what groups may be for you. Also, as you review the profile of your connections, take note of the LinkedIn groups they belong to and evaluate if you should join to! Once you are in a LinkedIn group you'll be able to search, find, and contact fellow group members.		
✓ MAINTAIN				
<input type="checkbox"/>	Set a Calendar item to "work" your LinkedIn	Make your interaction with LinkedIn a scheduled task. We recommend weekly. It won't work for you, if you don't <i>work it</i> .		

REMEMBER: You have to continue to add clients and contacts to your LinkedIn connections as you go. If you meet a prospective customer...go back to the office and search for them on LinkedIn. If you see a presenter you've met at an event, check if they are on LinkedIn. If appropriate, ask them to connect to you! It will make your effort to build business relationships infinitely easier and stronger