



LinkedIn Meeting to mutually connect prospects

Related policies:

- [Centers of Influence \(COI\) Management](#)

A 30 minute virtual minuting with a particular partner (prospect partner, partner or center of influence (COI)).

① Connect on LinkedIn with individual you wish to meet with if not already connected

It is critical that you are both connect before proceeding.

② Create document to track introduction paragraphs and introductions

Create the document in the Google Docs [XL.net](#) > Sales and Marketing > Partners folder.

File name: [INDIVIDUAL] - T[HEIR COMPANY] - [YOU] [XL.net](#)

Now, together figure out your introduction paragraphs. For some people you meet with, they might have multiple ones depending on the type of people you are introducing them to.

Here is a sample filled out one:

Intro for Adam to use:

I thought it might be beneficial to [intro](#) you both. Adam is the founder of XL.net - an outsourced IT firm in Chicago. He is constantly looking to appropriately connect owners, presidents, companies in his network in order to help them grow their business.

Taking a meeting with him will be a positive step. Best of luck to you both!

Intro for Gary to use:

I thought it might be beneficial to [intro](#) you both. Gary has been working with small / medium businesses in Chicago land for 22 years. He is constantly looking to appropriately connect owners, presidents, companies in his network in order to help them grow their business.

Taking a meeting with him will be a positive step. Best of luck to you both!

Adam Requested Complete:
[Michael Hoag](#), [John Jacobs](#), [Andy Eltzroth](#), [Denis Neville \(also knows Bill\)](#), [Eric Helfand](#), [Brian](#)

Gary Requested Complete:

Potential intros by Adam: Uwe Peregi, Joe Rickard, Kevin Masi, Dave Kahl, Zach Ziliak, etc

Here is a sample of multiple introduction types:

Intro for COI's to use with Associations:

I thought it might be beneficial to intro you both. Bill is the founder of SquareStack - a B2B SaaS platform created for small business owners. They work with associations to provide a solution for their members.

Taking a meeting with him will be a positive step. Best of luck to you both!

Intro for COI's to use with Non-Associations:

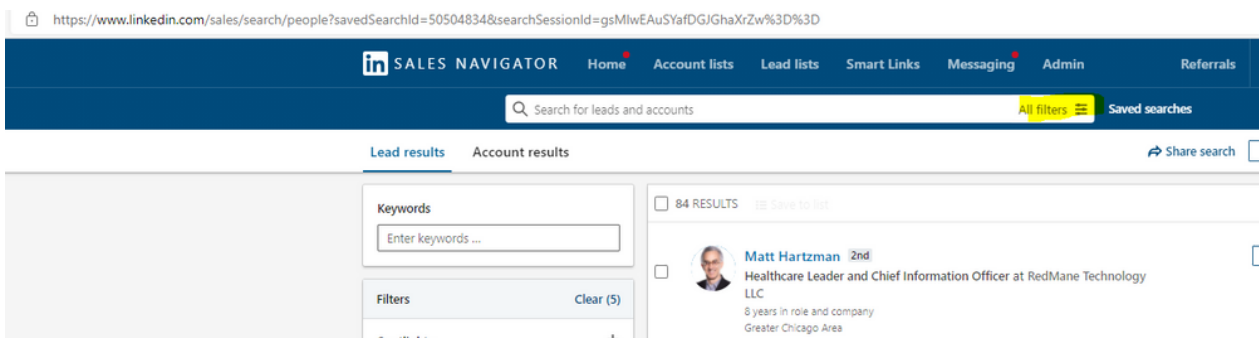
I thought it might be beneficial to intro you both. Bill is the founder of SquareStack - a B2B SaaS platform created for small business owners. He is constantly looking to appropriately connect owners, presidents, companies in his network in order to help them grow their business.

Taking a meeting with him will be a positive step. Best of luck to you both!

3 Login to LinkedIn Sales Navigator

[LinkedIn Sales Navigator](#)

4 Search the individuals LinkedIn connection for potential referrals starting by selecting search filters



5 Choosing filters and saving search

Select Geography: Greater Chicago Area

Select Relationship: 2nd Degree Connections (this will search through individuals connections you are meeting with, excluding shared connections)

The screenshot shows a search filter interface with the following components:

- Header:** "Filter your search" on the left, "81 results" and a "Search" button on the right, and a close "X" icon.
- Filter Tabs:** "Lead filters" (active) and "Account filters".
- Top filters:** A section with a toggle for "Apply your sales preferences" (currently off).
- Filter Grid:**
 - Keywords:** A text input field with the placeholder "Enter keywords ...".
 - Spotlights:** A button labeled "+ Add spotlight filters".
 - Custom Lists:** A button labeled "+ Select custom list" and a sub-option "Within: Accounts" with an edit icon.
 - Past Lead and Account Activity:** A button labeled "+ Filter your leads/accounts".
 - Geography:** A filter box containing "Greater Chicago Area" (highlighted in yellow) with a close "X" and "+ 1 more" text, and a sub-option "Within: Region" with an edit icon.
 - Relationship:** A filter box containing "2nd Degree Connections" (highlighted in yellow) with a close "X" and "+" text.
 - Industry:** A button labeled "+ Add industries".
 - School:** A button labeled "+ Schools someone studied at".
 - Profile language:** A button labeled "+ Profile languages".

Seniority level: CXO, Owner, Partner

Lead filters Account filters

Seniority level —

Included:

● CXO × ● Owner × ● Partner ×

VP (19)
Director (22)
Manager (6)
Senior (45)
Entry (24)
Training
Unpaid (1)

Function Title

Years in
+ Year

Company headcount: 11-50, 51-200

Company filters

Company

+ Companies or boolean

Within: Current ✎

Past company

+ Add past companies

Company headcount —

11-50 × 51-200 ×

Self-employed (17)
1-10 (95)
201-500 (28)
501-1000 (7)
1001-5000 (23)
5001-10,000 (6)
10,000+ (7)

Connections of: The individual you are current meeting with

Other filters

- Became a Member**
 - + When they joined LinkedIn
- Groups**
 - + Find people in groups
- Posted content keywords**
 - + Add keywords
- CRM contacts**
 - + Show contacts synced from CRM
- Connections of**
 - Justin Breen X +

6 Click Search

Filter your search 81 results **Search** X

Lead filters Account filters

Top filters Apply your sales preferences

- Keywords**
- Spotlights**
 - + Add spotlight filters
- Custom Lists**
 - + Select custom list
 - Within: Accounts
- Past Lead and Account Activity**
 - + Filter your leads/accounts
- Geography**
 - Greater Chicago Area X + 1 more
 - Within: Region
- Relationship**
 - 2nd Degree Connections X +
- Industry**
 - + Add industries
- School**
 - + Schools someone studied at
- Profile language**
 - + Profile languages

7 Have you saved this search type?

Understanding the "Connections of" will change with different individuals you meet with, have you saved the search?

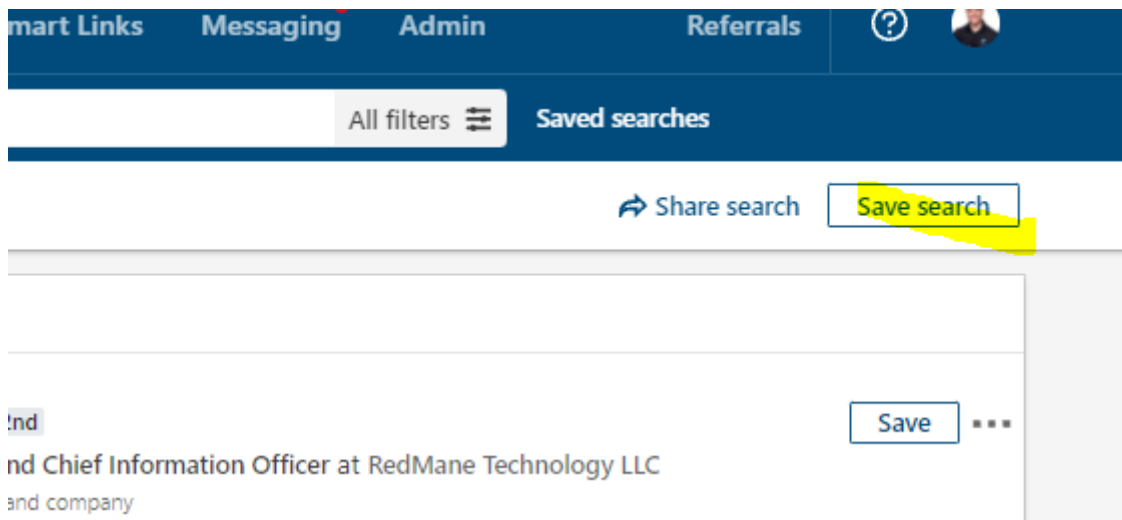
Answers

No Go to step 8

Yes Go to step 9

8 Save this search

Click Save search:



Save your lead search by filling in the name "LinkedIn Connecting", Alert frequency of Never and clicking Save search:

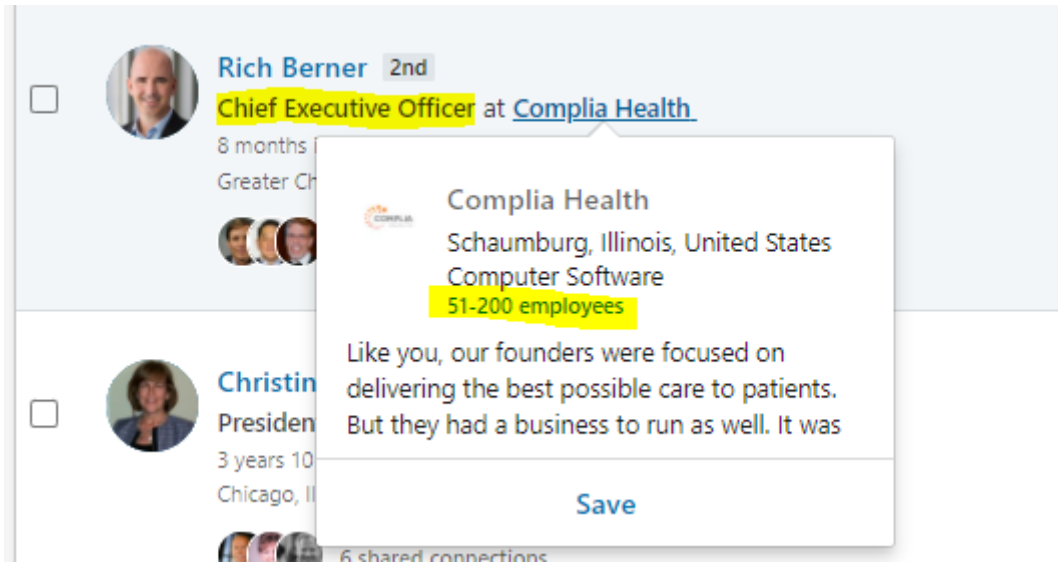
Save your lead search

This search will be saved to your saved lead search page

Name	Alert frequency	Created on
<input type="text" value="LinkedIn Connecting"/>	<input type="text" value="Never"/>	10/19/2021

9 Mutually identifying qualified and quality introductions

Yourself first look at the title, and then mouse over on the company name to see if it appears the right size and description:



If the title, company size and company description looks qualified, ask the other person if it appears it to be an appropriate introduction and something they know well enough and are comfortable to introduce.

10 Log selected introductions

In your document, log the successful introductions in two sections, ones you are offering and the others that you are being requesting to receive:

Introductions offered:

Lana Vukovljak
Rose O. - NAAAP -
Mollie Dowling
Stephen Gaither -
Ronald Mark Moen

Introductions requested:

John R Dallas
David Ormesher - 100 (maybe too big)
Jim Langhenry
John R. Yedinak - Aging Media

11 Done identifying introductions?

Have you either reviewed all connections, or have a maximum of 5 introductions?

Answers

No Go to step 9

Yes Go to step 12

12 Each can open their emails and begin introductions

One by one, complete each of the requested introductions.

13 Schedule next linkedin connections meeting

If you have a lot not completed reviewed both of your potential introductions, schedule another meeting 30 days out.

If you have completed at least one of your potential introductions, schedule another meeting at least 180 days in the future, if at all.

