Sage Social Selling Cheat Sheet

How to Get an Introduction to Your Prospect

The purpose of this document is to enable you with tips and tricks to become a top Social Seller at Sage. If you have any questions, comments, or suggestions, please don’t hesitate to contact Michael E. Rubin at Michael.Rubin@sage.com.

Introduction

A recent study revealed two important data points relevant to B2B sales:

- 90% of B2B buyers ignore cold calls
- 87% of customers want to be introduced vendors and salespeople through their network.

Clearly, prospects want to connect with people they know and trust. But what if you are not already connected to your prospect?

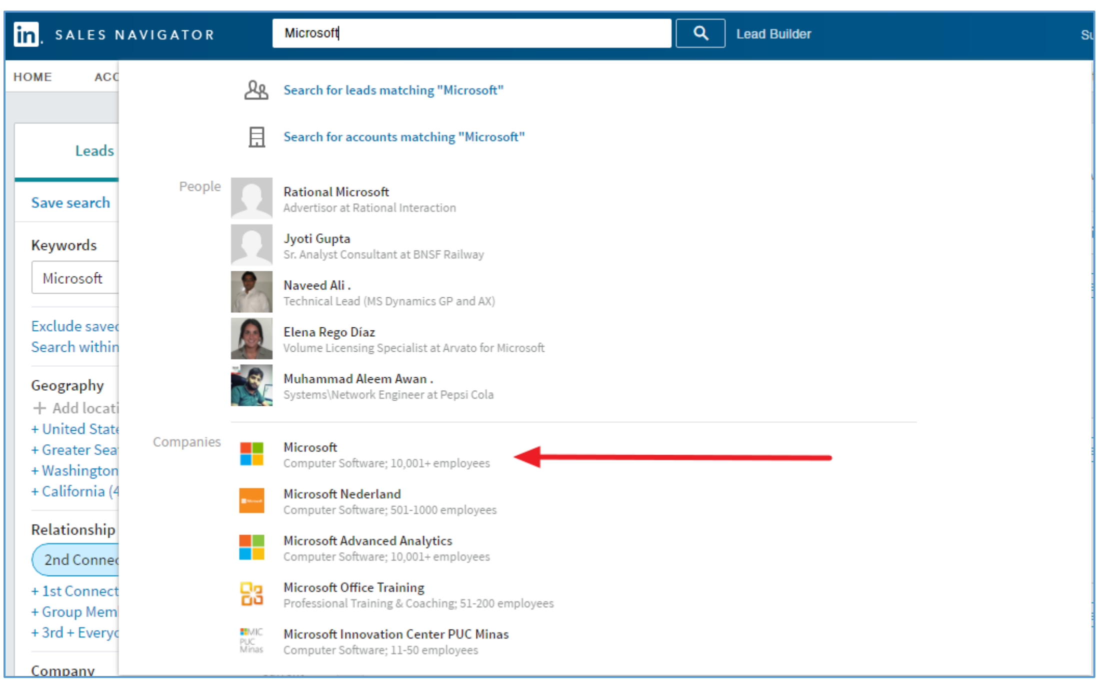
This is where Social Selling can be particularly effective. Just arrange to have a person they are already connected with to make an introduction. LinkedIn Sales Navigator not only simplifies this process, but also shortens the amount of time it can take.

Hypothetical Example

In this Cheat Sheet, we will use a hypothetical example where you are trying to sell accounting software to Microsoft. ***Remember, this is hypothetical and should not be used for actual prospecting.***

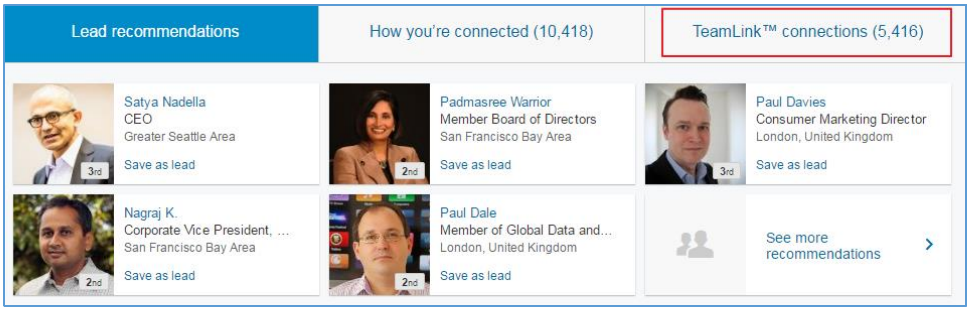
Step 1: Find your prospect in Sales Navigator

After you’ve logged into Sales Navigator, use the Search bar or Lead Builder to find your prospect. For the purposes of this hypothetical example, we’ll use the Search bar and select the company from the drop-down menu.

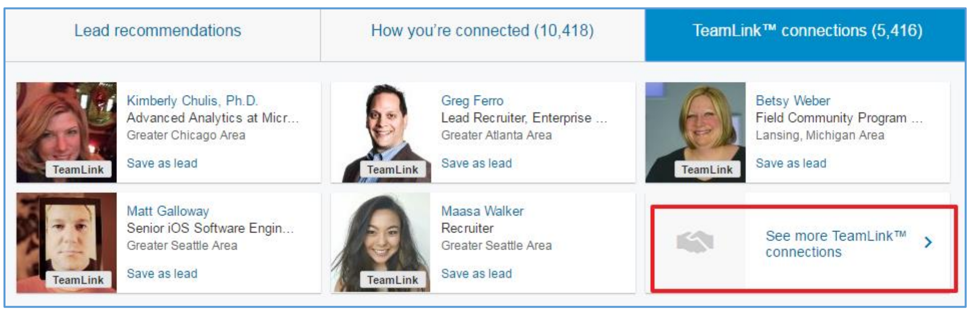


Step 2 – Use TeamLink to get closer to your prospect

Sales Navigator will then show you a three-column box with lead recommendations, how you're connected, and your TeamLink connections. Click "TeamLink connections"

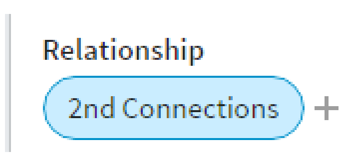


Then click "See more TeamLink connections"

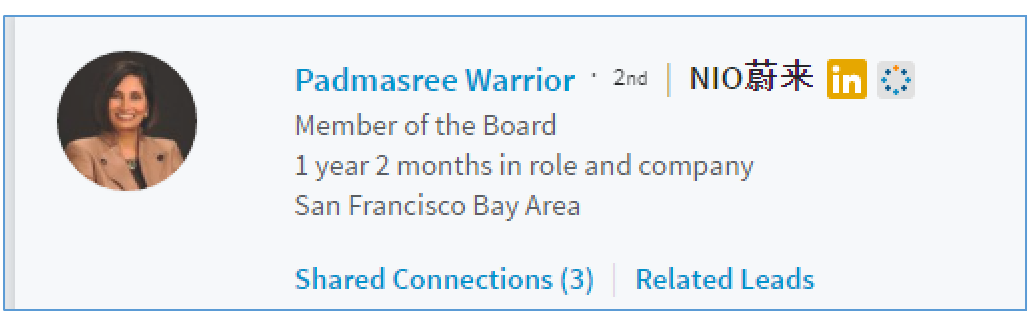


Next, you will be taken to the TeamLink screen. Make sure you're only seeing people at Microsoft and individuals who might know your prospects by applying some filters in the left-side column.

- Select "2nd Connections" from the Relationships area
- Select "Microsoft" in the Company area

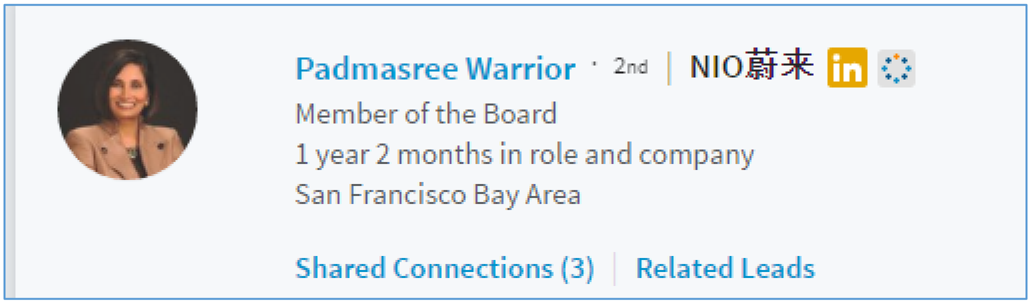


In the middle-column of your screen, you will now see hundreds of prospects. One of them is Padmasree Warrior, a member of the Board of Directors at Microsoft.

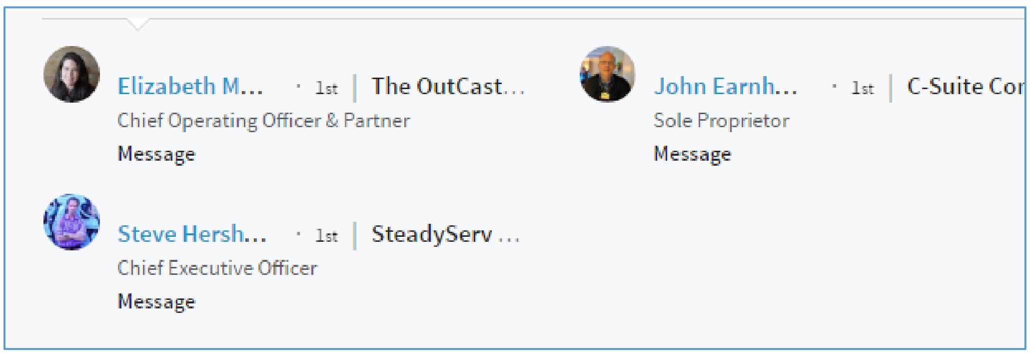


Step 3 – Use TeamLink to see who is connected to your prospect

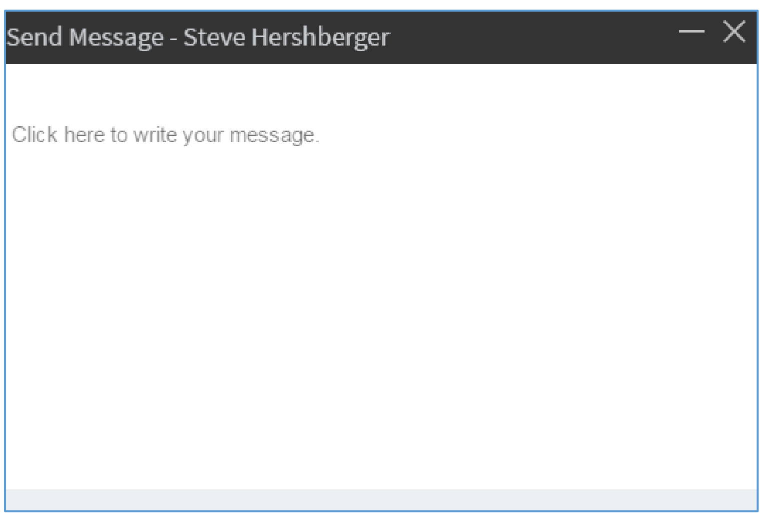
Ms. Warrior is a key prospect, but a second-level connection. You need an introduction. Click "Shared Connections."



Next, TeamLink shows who in your network has a direct connection with Ms. Warrior. In this example, you are shown three people.



Selecting any of these individuals will prompt LinkedIn to open a new message with which you can request an introduction to Ms. Warrior.



Level of Difficulty	Beginner	Intermediate	Advanced

Tips for Introduction Requests

Here are some general tips and recommendations to consider when requesting introductions:

1. Make it easy
    - Don't repeatedly ask the same person for introductions.
    - Tell your contact why this introduction will be valuable.
    - Be honest. Always state the reason you want the introduction.
    - Give the introducer a comfortable way to decline your request.
    - Create some messaging your introducer can use to make it easier for them to reach out on your behalf.

2. Follow through
    - Follow-up 2-3 business days after your initial request

3. Name drop
    - Ask your TeamLink connectors if you may drop their name as a fallback if they are not comfortable making the introduction.