10-Steps to **Never Run Out** of Qualified Prospects

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Follow this 10-steps guide to fill your calendar like the top 3%

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Never Run Out of Qualified Prospects 🤯

THIS IS IT. The guide here will walk you through exactly how to set up a pipeline over LinkedIn that fills your calendar every week with qualified prospects.

Every painstaking detail is here. Use the checklist. Read it once, have this tool forever.

If you have 3 months as an advisor, you know prospecting is the heart and soul of this business.

Why Your Business Is Not Growing (Fast) 🦥 → 🚀

Question 1: Are you prospecting via in-person referrals or networking events? Likely yes.

Question 2: How many other advisors are doing the same? 99.9%.

Question 3: What are you doing differently that will give you better than average results?

Because being **average sucks**…look at churn rates of people leaving the industry before the first year.

Here, you are building a pipeline that **less than 3% of advisors** use, and that's how you begin moving towards being in the top 3%.

Why Does This Work? 🤔

Simply because of **leverage**. When you meet and ask for referrals, for one unit of your time (15 min at minimum), you are cultivating one relationship and maybe gain 2 referrals at best.

When you have this pipeline, you spend 3-5 units of your time setting up, and get back 100+ conversations and opportunities, without needing you to meet them first. **Feel the difference?**

This is how you grow by **2-10X** your business, by opening the floodgates of qualified prospects, and spend your time only where it matters, on building relationships, consistently.

👇 Ready? Let's Build…Follow steps 1 to 10 👇

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1. The Platform (~3 min) ✅

The social platform we are using is LinkedIn. It is hands down the best platform to use for professional networking. Why? Because people are on LinkedIn for professional, career and job reasons, not cat or dance videos.

- [ ] Create or log into your LinkedIn account

2. Your Brand (~30 min) 🏷️

Your LinkedIn profile should be relevant and attractive to your target audience, specifically, it should indicate that YOU can solve their potential problem and/or have the resources to do so. Make sure to:

- [ ] Place a profile picture that is professional and relates to your target audience
- [ ] Insert a banner image that reflects your brand and the demographics of your target audience. This is the largest piece of real estate on your profile, make it stand out. It's the first impression of you.
- [ ] Create a headline description (your tagline) to state who you are, your values, who you help and what makes you unique
- [ ] Expand the headline (tagline) into the About section and tell your story. Convey that you understand your demographic and you're focused on them
- [ ] Decorate your featured section (add one if you don't have one) so that you showcase your work, accomplishments/results and a CTA (call to action) that removes friction for them to reach you
- [ ] List out your relevant experiences that relates to how/why you are able to help your audience
- [ ] Complete your profile out with education if it's relevant. Don't worry too much about this, even if you didn't finish high school. Degrees can help with credibility, and not having it isn't going to take away anything.

3. Target Audience (~10 min) 👥

- [ ] Think back on your life/work experience and list out the groups and avatars you resonate with eg) If you were a nurse in Seattle, nurse and Seattle are two potential groups
- [ ] Be as specific as possible, and identify no more than 2 target markets. These days, the only way to cut through the noise is with focused messages for your exact avatar

Group 1: ____________________________

Group 2: ____________________________

4. Personalized Outreach (at least 30 min, go for quality here) ✍

Now that you have your exact target audience in mind, you should think about their life.

- [ ] What seasonality is it with the profession (peak season or low?)
- [ ] What specific challenges do they have
- [ ] How do you want to start and frame the conversation (cheerful, professional, direct etc)

Pro tip: NEVER start your message sequence with a sales pitch. Remember, you are interacting with another human being on the other side, treat it like a face-to-face conversation

- [ ] Build your **first message** without any ask, just relate to their profession, location etc. The invite is already “an ask” for them to connect with you.
- [ ] The **second message** is to anchor the conversation, keep it broad, high-level, but still related to where you want to take the conversation later.
- [ ] The **third message** is a simple follow-up
- [ ] The **fourth message** is to convey your value, or better yet, deliver value directly
- [ ] The **fifth message** is one that is at least 2 weeks after the fourth message. It’s there in case your prospect doesn’t go on LinkedIn often

See how the messages all link together?

5. Get Your Software Tools (~20 min) 💻

With your personalized messages done, it’s time to piece together software and build the pipeline.

- [ ] Pick your general LinkedIn automation software. Most are the same, and achieve the same. You just need one to allow you to schedule and send messages on LinkedIn and be able to feed a list of qualified prospects into it.

If you want our opinion on the software, reach us at info@LeadGoalsAccelerator.com and our team can give you the long version.

- [ ] Integrate (connect) your LinkedIn account with the software, follow whatever instructions is there
- [ ] Integrate (connect) your software with your CRM, whichever it happens to be. Make sure new contacts get pushed to it.
- [ ] DON’T lose track of your qualified leads. Life happens, but don’t let business slip away because you “forgot”

Again, if you want to see which **CRM LGA** uses and how we hook it up, drop us a message at *info@LeadGoalsAccelerator.com* - Our team has tested and evaluated multiple setups/software tools

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6. Configure Your Pipeline (~20 min) 🧑‍💻

This is the core of it. How you configure the software determines how effective your pipeline is, and how much time you can redirect to building relationships, instead of managing your pipeline.

- ☐ Create your campaign or however your software calls it, this guide will call it campaign in the general sense
- ☐ Take your target audience and create a search in LinkedIn (or Sales Navigator if you have it) that best reflects your target audience
- ☐ Take the list of matching profiles returned by LinkedIn and feed it into your software
  Most software should be able to ingest a search URL, CSV or common input methods
- ☐ Add your personalized script into the new campaign, make sure to sequence it right and check for any typos, grammar mistakes and personalization placeholders (first names, title etc)
- ☐ Set the appropriate time intervals in between messages. It's an art but in short, don't be spammy (very short intervals), desperate (ineffective follow ups), uncaring (typos and being too casual), indifferent (uninteresting conversation starts or questions)
- ☐ Configure the software to STOP when a reply happens.
  You WILL lose business if you let your automated messages continue.
  The worst case is you get reported as a spammer/bot to LinkedIn.
- ☐ Configure the software to push new contacts to your CRM
- ☐ Start your campaign and monitor each day, more details in step 10

7. Set Up Your Meeting Tools (~10 min) 📆

The goal is simple here but there is A LOT of nuances: from picking the right software, to HOW you should drop this link and WHICH questions you should have when clients book a meeting with you.

This is a rabbit hole, because this is where the sales side of the business comes into play. This guide would be way too long and go off track discussing the sales process on top of this pipeline. For now, just:

- ☐ Pick a calendar/scheduling tool that is compatible with your calendar. Your company may have issued one to you already
- ☐ Test the link, don't lose business because you didn't take 2 minutes to verify

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8. Respond To DMs (Ongoing Work, ~1h per day) ⌨️

This is where process bridges into art. What to say, how to say, when to say all make a difference to the quality of your conversations.

Again, the guide will steer away from the art and science of sales. What you need to do here is to make sure that you dedicate 1-3 hours a day to respond to new replies, AND follow up on previous conversations that you did not receive a reply for.

“The money is in the follow up” as they say. It is unreasonable to expect many prospects to be ready to work with you on the first few message exchanges, that’s not how humans work.

- [ ] Set a daily calendar event for yourself to dedicate to responding to your DMs
- [ ] Track your metrics (number of responses, meetings set, follow ups done etc). You can download the free spreadsheet from LeadGoalsAccelerator.com/free-resources
- [ ] Use your CRM to create reminders/tasks so you follow up with each prospect where possible
  Rule of thumb: If the prospect didn’t say “leave me alone”, you have your foot in the door, you just need to figure out the right message to build on the relationship
- [ ] Practice and know that it’s ok to make mistakes (just not the same ones repeatedly), the pipeline WILL bring you more opportunities.

Know that, DM response DM response and conducting meetings (sales) is aare (sales) skills. The more you practice, the better you will be. There are more free resources dedicated to this topic on our website.

9. Use Your CRM (Ongoing Work, ~20 min per day) 🗒️

The reason is simple, not all prospects you come across will be ready to do business with you when you first get connected. While it’s possible, don’t bank your business on that and don’t rely on remembering to follow up with every potential prospect 2 weeks or a month later.

- [ ] Add the contact information to your CRM when new replies land in your inbox if your software doesn’t do this
- [ ] Create a follow up task or reminder to re-engage the conversation
- [ ] Prep for intro calls by writing notes into your CRM for each prospect. Your result literally depends on how well your meeting goes
- [ ] Write notes throughout the call and/or after the call. You should be improving your sales ability with each call, otherwise no amount leads will change anything

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10. Monitor Your Campaign (Ongoing Work, ~15 min per day) 📊

Routinely, say twice a week, you should be checking your campaign for:

- [ ] Sending the desired number of connections, messages and invitations per day
- [ ] Not running out of prospects
- [ ] Your message sequence is performing with a reasonable conversion rate (in generating new replies)

Done - Repeat Steps 8-10 Until You Win 🚀

So, if you read through that for the first time and thought, “boy there is a lot there”, you’re right.

Building a proven pipeline that consistently fills up your calendar with prospects isn’t supposed to be easy, otherwise wouldn’t you expect every advisor to be crushing it?

The good news is, you have this complete guide as a reference. It is an instruction/SOP manual.

Download it, print it, refer to this as you’re building and maintaining your pipeline.

To be real with you, with our team having done this for over 3 years, building and maintaining this pipeline is only **HALF** the battle. The second half of it is upping your sales abilities to capture those new opportunities. The pipeline simply opens up unending opportunities to practice for you.

Leads won’t matter unless you can convert them.

If you have any questions on how to begin tackling this problem, you can dive into this rabbit hole by sending an email to:

Info@LeadGoalsAccelerator.com

Additional resources are available at

LeadGoalsAccelerator.com