

Small Biz LinkedIn Sales Navigator Checklist

Print off this checklist and tick off each step as you go through the [`LinkedIn Sales Navigator for Small Business Owners: A Stress-Free Guide`](#) guide on our Talk About Digital Podcast website.

Setting Up LinkedIn Sales Navigator for Small Business Success

- Choose the right Sales Navigator plan for your business
- Configure your sales preferences (location, industry, company size, etc.)
- Navigate the Sales Navigator dashboard and familiarise yourself with its features

Building Your Ideal Customer Profile

- Use advanced search filters to identify key leads (e.g., job title, industry, location)
- Save leads and accounts for efficient tracking
- Use Sales Spotlights to find engaged prospects

Connecting with Potential Customers

- Send personalised connection requests that stand out
- Craft impactful InMail messages to start quality conversations
- Use mutual connections to warm up cold leads

Leveraging Lead and Account Recommendations

- Understand how to use LinkedIn's automated lead recommendations
- Customise recommendations to align with your business needs
- Set up alerts to stay informed about key prospect activities

Nurturing Leads and Building Relationships

- Track lead engagement using Sales Navigator's insights (e.g., job changes, shared posts)
- Organise your pipeline by using saved leads effectively
- Engage with lead content to stay top of mind

Turning Leads into Customers

- Monitor lead activity for the perfect follow-up timing
- Use account insights to deepen connections with key customers
- Close deals with a data-driven approach (e.g., InMail response rates, lead engagement)

Utilising Analytics to Optimise Your Sales Strategy

- Analyse key metrics in Sales Navigator to track success (e.g., profile views, response rates)
- Adjust your targeting and messaging based on the insights gathered from analytics
- Continuously refine your lead generation approach for better results

Maximising Efficiency with LinkedIn Sales Navigator

- Set up automated lead search alerts to receive new leads without manual searching
- Organise your daily tasks to streamline efforts (e.g., checking alerts, sending follow-ups)
- Achieve results in just 10-15 minutes a day by focusing on high-impact tasks

Maximising Your Growth with LinkedIn Sales Navigator

- Review the key steps to success and ensure each has been implemented
- Commit to daily engagement for consistent results
- Use analytics to continuously improve your approach and targeting



- Take action to grow your customer base by following these steps regularly

By using this checklist and following the related guide on the TAD website you will understand how to take your lead generation to a whole new level by using the features LinkedIn Sales Navigator offers. A free trial is usually offered for you to give it a test-drive.

If you found this checklist and guide helpful, subscribe to the Talk About Digital Podcast (available on our website and all major podcasting platforms) and give it a listen as we share even more actionable value in the form of the 'TAD Takeaway'.