Sandler Training®

LinkedIn® Levers Tool

Use this checklist for ideas to consider when using LinkedIn to research specific contacts and their company.

Researching the client: _Tom Donovan_	
Do you have any mutual connections with the client?	Yes, 4 first connections and 23 second.
How many connections does the client have?	500+
Which college attended and degree attained?	Loyola University, BA, MIS.
What is the client's hometown and current city?	Originally from Wilmington, NC, and now living in Towson, MD.
Where did the client work previously?	Turner Consulting, GT Strategies
How much time did the client spend at previous jobs?	4 years at Cool Hot, 5 years at GT and 7 years at Turner.
Which companies and groups does the client follow?	Loyola Univ. Alumni, ISOM, Turner Alumni, GT Strategies, TGT, EMC, KOL Apparel
What type of info does the client post/share? Which influencers does he follow?	Not a frequent poster
What activities and interests does the client list?	None noted
To which industry groups does the client belong?	National Retail Association, E-Comm Network, Paymetric, Data Storage Professionals
Does the client endorse others? Is he endorsed often and for what?	BI – 86, E-Comm – 51, Strategy – 34, ERP – 22, Vendor Management –19
Has the client been recommended by anyone? If so, by whom?	10 personal recommendations by supervisors and co-workers.
Does the client support any charities or initiatives?	Habitat for Homeless
Researching the company: _Cool Hot Apparel_	
How does the company present itself in its profile? Are there any key themes?	Leading edge in technology, highest quality, "every product makes you better."
What competitors are identified in the company's "also viewed" section?	KOL Apparel, Land Sports, Scoreboard Fits, Leopard, Old Balance
Do you have any connections with former employees?	497 first or second connections.
Is the company currently hiring full-time employees? In what areas?	Yes, in many areas – product management, marketing, business analysis, editing, etc.
What key products/services does the company highlight in its profile?	"CH Life" theme features CH people, "Be humble, stay hungry."
Can you identify any connections after scrolling through the company's employee list?	Yes, at least 6.

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Does the client endorse others? Is he endorsed often and for what?	
Has the client been recommended by anyone? If so, by whom?	
Does the client support any charities or initiatives?	
Researching the company:	
How does the company present itself in its profile? Are there any key themes?	
What competitors are identified in the company's "also viewed" section?	
Do you have any connections with former employees?	
Is the company currently hiring full-time employees? In what areas?	
What key products/services does the company highlight in its profile?	
Can you identify any connections after scrolling through the company's employee list?	

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Exercise: LinkedIn Levers Tool

Given the scenario examples, identify how the LinkedIn Levers Tool can be helpful to you in the sales process.

Scenario Examples	LinkedIn Lever Actions
Debbie Smith, the new finance manager at Newco, has requested a meeting. You have heard that she went to your alma mater.	
Ryan Thomas, the new purchasing manager at TimeCorp, has been reported to have strong relationships with your competitor, Dyno, Inc. You have a meeting set with him in two weeks.	
You're interested in pursuing a new account, DNR Company, and you would like to gain some insights.	