



LinkedIn Getting Started Checklist

There are many ways to get going on LinkedIn. Here's our suggested checklist for getting started:

- **Open a profile (if you do not already have one).** Go to www.linkedin.com and to the home page and follow the prompts to enter your first and last name, email address and a password. LinkedIn will then prompt you through set up. One privacy question you must ponder is whether you will allow people you are connected to see your LinkedIn connections. ***Since seeing and leveraging the connections of your connections is one of the most important benefits of LinkedIn, it is politically incorrect (or deemed selfish) to block people from seeing your connections.*** So, it's our position that you should allow others to see your contacts. But don't worry unduly, you can protect your connections by being careful about who you allow to become connected to your account.
- **Bring your profile to 100% completeness.** Manage it like any other project and get it done. To do so, you have to have included various elements including:
 - Your profile summary, which is your professional branding
 - A profile photo
 - A current position
 - Two past positions
 - Something about your education
 - Any specialties you may have – think of these as key words people may use to find you, so make them count
 - At least three recommendations from others – a good way to get these is to go out and recommend someone you genuinely believe in and then ask them to reciprocate
- **Begin making contacts.** The many benefits of LinkedIn, including branding, marketing, business development, recruiting and market research, grow exponentially as you add more contacts. Spend time increasing your sphere of influence and:
 - **Accept all of the invitations you have already received (if applicable).** Once your profile is established, there may be pending invitations in your in box from people who have invited you in the past. If you know them and are comfortable connecting to their LinkedIn account (allowing them to
 - **Allow LinkedIn to import contacts from your e-mail software** (Outlook, Gmail, etc.). Find this feature under the Contacts drop down in LinkedIn. If you are unable to access your e-mail files yourself, talk to your internal IT group about how to access your address book to import the contacts and then:



LinkedIn Getting Started Checklist

- **Sift through them and decide which one's you're comfortable inviting.** Uncheck the boxes next to those you do not want to invite.
- **Remember only to invite people you know and who know you,** so you don't receive rejections, or what are called "I Don't Know" (IDK) responses on LinkedIn. LinkedIn is very serious about their spam management and contact quality, **so they allow you only a very small number of IDK responses to your invites before they restrict your account.**
- **Personalize your mass e-invite to your contacts database.** People will feel more like they know you if the invite contains information or a personal message that allows the recipient to relate to who it is that's inviting them.
- **Vampire off of your connections.** Once you make a direct connection, you can go out to that connection's profile and click on their connections to open up a dialogue box to see who that connection is connected with. **Remember, seeing and leveraging the connections of your connections is one of the most important benefits of LinkedIn!** Take the time to read the list – no matter how long – to see if there are any connections worth having for now or in the future. If you find some that will know you and will make a good connection, click on "Add SO AND SO to Your Network," and send that contact an invitation to connect through the system. LinkedIn will guide you through doing so, and when it gives you its standard boiler plate invite note of, "I'd like to add you to my professional network on LinkedIn." stop and personalize it. Add the person's name and some context around how you know them, like, "Susan, you and I met at the AICPA Governmental Conference last June. I'd like to add you to my network on LinkedIn." Or "Susan, you and I are both connected to Brad Roberts. I'd like to add you to my network on LinkedIn."
- **Join some groups.** Use the search box in the upper right hand corner of LinkedIn and search by group. Type in keywords that are of interest to you – like "accounting" or "agriculture" or others associations, schools or groups that might make sense to join. LinkedIn boasts thousands of groups and you are limited to 50 groups that you can join – so choose wisely! Be sure to join a few pertinent groups as part of your start up process.
- **Go to your Home Page on LinkedIn once per day.** This will allow you to read any messages you have, accept any invitations you receive and also will provide you a "feed" of information about what your connections are up to on LinkedIn. As you view their activity on your Home page, you



LinkedIn Getting Started Checklist

may see that they are connecting to people you should connect to, attending events that you'd like to attend or doing other things on the platform that are worth exploring. While you're there, update your own status under "Network Activity" to tell all your connections what you're up to. Do this at least once per week to keep your name and firm appearing on your connections home page – which is great to keep you and your brand top of mind.

Once you've tackled the items on this checklist, you'll be ready for more advanced use of LinkedIn, including:

- Contacting interesting potential connections and setting up phone introductions
- Conducting market research on potential clients and existing clients
- Using the platform for competitive research
- Setting up events and promoting them to your network
- Using the platform to ask for introductions
- Starting discussions on groups
- Starting your own group
- Answering questions posed on the platform
- Placing advertisements or job placements

If you have any questions as you're getting started on the platform, please contact Tamera Loerzel at tamera@convergencecoaching.com and we'll be happy to help you!