How to Use LinkedIn as a CRM Tool to Connect with Clients and Prospects

Customer relationship management (CRM) applications offer a depth of valuable information on clients and prospects to satisfy their needs better. You can organize, collect, and manage data and interactions throughout the customer life cycle to drive sales growth. All this can lead to improved client relationships, less client attrition and increased revenue.

One CRM application at your fingertips is LinkedIn. The desktop and the mobile platform has a built-in system for reminders, storing information about your contacts and archiving of your correspondence.

“Simplification is necessary,” says Bill Corbett, Jr., president of Corbett Public Relations, Inc. “For people who are active in the LinkedIn world and use the platform, this is an excellent tool. The tracking of conversations and the reminders alone are useful features that you should use.”

You can find LinkedIn’s CRM field in the Relationship tab (marked by a star) under each of your connection’s profile summary. It is a space where you can store details visible only to you that will help you maintain your relationships and stay top of mind with your network. You can create and add notes, set reminders, jog your memory about how you met someone, and tag contacts with keywords.

“This is the most underutilized part of LinkedIn because most people focus on just sending connection requests like they are the new business cards,” says Philip Blackett, founder, and CEO of Magnetic Interviewing. “With persistence, you can get ahead of everyone else, that can significantly benefit your business and career.”

You’re looking for new prospects, and you want to connect with current customers on LinkedIn, these are the four points under the Relationship tab you should get familiar with plus a few tips on how to make it work for you.

- **Write a note:** A note could be anything about your connection, from the name of your contact's spouse to the best time to reach him or her during the week. If it's a client or a prospect, you can include notes from a recent phone call. This feature provides you with a date and time stamp along with a scrollable history. The first default record for each of your contacts is when you and this contact first connected on LinkedIn.

- **Create reminders:** With this feature, you can set a reminder to send a thank you email to a prospect for next week. You can also ask LinkedIn to notify you about an upcoming appointment or a conference you plan to attend.

- **Remember how you met:** Details about how and where you met someone could come in handy if you ever connect with that person face to face and need an ice breaker. Not only can you record how you met a particular contact, but you can include who introduced you as well.

- **Organize your contacts:** A tag categorizes the connection. By adding a tag to each profile, you can group your contacts into various categories, such as clients, prospects, business partners, vendors, friends, work colleagues, and family. After adding tags to your connections, you can email everyone who has that tag within your LinkedIn network. You can create up to 200 tags on LinkedIn.

Share educational, useful information

So what happens next? How do you pull all of this data together so you can interact with your contacts to get some referrals and hot sales leads?

First, get in the habit of filling out relationship data immediately after connecting with someone on LinkedIn. Make notes on where you met, what you discussed, what their interests were, their spouse's name, and any other pertinent information.

Then, take some time to sift through your connections and tag your network. Yes, this is a straightforward and time consuming task, especially if you have several hundred contacts. Even if it seems daunting, devote just 20 minutes a day to work on your contact list.

Take 10 minutes at the beginning of the day and 10 minutes in the end if that accommodates your schedule better.

Once you have tagged your entire network, you can now send group messages. Under your Connections tab, select “Filter by All Contacts” and then go to where it says “Tag.” It is how you can locate your tagged individuals. When sending a message, don’t try to sell your services or pitch your products. Instead, share helpful, useful content. Be educational instead of promotional. Remember to uncheck “Allow recipients to see each other's names and email addresses,” before sending any group messages.

Set a reminder alert to send articles of interest at least once a month. In fact, you can leverage LinkedIn’s Pulse feature—its blogging platform that allows you to write an article or a long form blog post. Under your profile, select “Publish a Post.” When you publish an article or post, it becomes part of your professional profile in the Posts section.

As soon as you published the post, it automatically appears in your network’s feed, and depending on how your connections’ email features are, some may even receive an email alert. LinkedIn members who are not in your network can follow you just from your long form posts to receive updates when you publish next. Best of all, your post is searchable both on and off of LinkedIn—greatly improving your search engine optimization efforts.

Here’s how you can send your connections a link to your Pulse content. Find an article anywhere online and write, “Here's a great article on 3D printing from Industrial Weigh & Measure Magazine that I thought this might interest you. Then add the two links to each of these posts. If you do this once or twice a month, it helps cultivate top of mind awareness with your network.

Stay in touch with your connections

LinkedIn has a feature under the Connections tab called “Keep in Touch.” It is where LinkedIn includes information on people’s birthdays, promotions, new job, and work anniversaries. It just takes a few seconds to say congratulations to a connection or to wish someone a happy birthday.

“Most people don't take on this daily task of checking to see whose work anniversaries and birthdays are every day,” says Blackett.

Blackett recommends going beyond just “liking” someone’s work anniversary and instead write a short personalized comment. “The extra effort goes a longer distance towards you being unique from everyone else and more top of mind. Also, send people a LinkedIn message to wish them a happy birthday. With daily consistency, you'll differentiate yourself from the crowd.”

Become a business matchmaker

Finally, help other people in your network to introduce (via a personal message) to your connections. When you discover one of your connections has a need for a particular skill set, specialty or even a potential partnership with someone that you may know, help them make that connection.

“Whether he or she explicitly asks for an introduction, be proactive and seek each day to find one opening for someone within your LinkedIn network,” adds Blackett. “This will bring in reciprocity and good karma, as some of those connections will seek to return the favor and help you out when you're in need later on.”

“In business, it is critical to saving time,” says Corbett. “This CRM application saves time and helps people to become better organized. LinkedIn is also an excellent way to get people’s attention, and it is separate from regular email and other noise. People need to invest time to secure the attention of others. Doing this through LinkedIn accomplishes several goals. For most people, this system is adequate.”

LinkedIn can be a great tool for managing your lead nurturing. It’s a simple yet functional CRM to help you keep track of contacts and stay connected with your customers. If you’re already using a CRM application you’re pleased with, consider using LinkedIn as a backup.

To make LinkedIn work better for you, get in the daily habit of logging into LinkedIn every day. Spend at least 10 minutes a day tagging contacts, reaching out, sharing relevant articles, sending messages, congratulating someone, or simply saying happy birthday, the return can be incredible.