

Linked In – Systemised Process

A three stage connection and engagement process seems to be most effective:

1. It allows the prospect to come to us, in their own way/time. The approach should be thought of as 'fishing', not hunting. Any sales language tends to trigger an immediate rejection.
2. Each stage is easy for the prospect – they only need to make a small step, each time, in our direction.

Example wordings (Vistage)

Keyword search phrase: eg. ("Chief Executive Officer" OR CEO OR "Managing Director" OR Founder OR C.E.O. OR Owner)

Connection Request 1 (with mutual contact)

Hello [name],
We haven't spoken before but I am a fellow Managing Director and mutual contact of [shared connection]. I also chair a CEO Private Advisory Board in the Thames Valley. I wonder if you would be interested in connecting?
Kind regards

Connection Request 1 (cold)

Hello [name],
We haven't spoken before but I am a fellow Managing Director in the Thames Valley and I also chair a CEO Private Advisory Board locally. I wonder if you would be interested in connecting?
Kind regards

Message 2 Intro

Hello [name],
Thanks for connecting. If you would like to hear more about our local CEO Peer Advisory Board, I can either share more information with you via email/Linked In or we could arrange a time for a short telephone chat. Let me know if you'd like to do that and which you'd prefer?
Kind regards

Message 3 Info Email

As requested, below you will find some more information regarding our local CEO private advisory board. If, having read this, you're still curious to hear more, then let me know and we can schedule a short telephone call to explore whether we should meet.
Kind regards

Vistage International

How confident are you that you have the right strategies in place in your business? What are the biggest challenges you face? Where do you think you and your team most need to improve? Who do you have to speak to about these issues? Who tests your thinking?

- the world's leading CEO organisation with 22,000 members across 16 countries
- formed in the US in 1957 with a mission to increase the effectiveness and enhance the lives of CEOs
- bureau of world-class speakers and provider of on-line resources, expertise and tools

In the UK we have been established for 27 years and now have over 1200 members in total, across c.80 groups. I Chair a group of CEOs in the Thames Valley area and there are currently 14 of us, from a range of different business sectors. All of us are lifelong learners who share a desire to grow our businesses and continually improve our own leadership skills. We work together on our business challenges and opportunities, sharing our experiences and knowledge to make better decisions and get better results.

- for more information on how a typical advisory board works and existing member case studies please see the following short video clip: <https://www.youtube.com/user/VistageUK>

Chaser for Message 2 Intro

Hello [name],

I just wanted to check that you had received my follow-up email below. If you are still interested in our local CEO private advisory board then let me know and I will forward additional information via email or Linked In.

Kind regards

Follow up for Message 3 Intro

Hello [first name],

I hope you have had chance to review the information that I sent you regarding our CEO private advisory board. The reason I contacted you was because we have a space in our group for a CEO from your sector and your name had come to the top of a selected list I have. However, Vistage is not for everyone and not everyone is right for our group. It would be good to arrange a convenient time to have a short chat on the telephone to explore it in more detail – perhaps you could let me know whether you would like to do that and, if so, when would suit you?

Kind regards

Email communication - structure

All emails should answer the following questions (in sequence), in no more than 5-6 sentences:

1. Who are you?
2. What do you want?
3. Why are you asking me?
4. What's in-it-for-me?
5. What is the next step?