



# LinkedIn: Advisor Weekly Action Plan

## Directions:

Your ROI from LinkedIn is a direct result of your strategy, execution and consistency. The **Weekly Action Plan** provides a repeatable framework for your activity each week so that you can acquire new clients consistently. Block out 1-2 hours on your calendar each week to complete the following seven tasks. By putting in focused work per week, you'll see your LinkedIn business grow exponentially. *(Note: Critical weekly activities are ranked 1 – 4)*

### ACTION PLAN – BEGINNER LEVEL

1. Have you **shared 1 piece of content** that's helpful to your ideal client?   
- *(Pro Tip: Use free automation software such as Buffer to schedule posts & save time)*
2. Have you **engaged (Liked or Commented) at least 3 pieces of content**?   
- *(Pro Tip: Go to the "Recent Activity" section of a prospect's profiles to find content)*
3. Have you **found and connected with 5 new prospects** this week?   
- *(Pro Tip: Search for "2<sup>nd</sup> Degree Connections" of existing clients -> [How to Search](#))*
4. Have you **sent 5 private messages or emails to prospects** this week?   
- *(Pro Tip: Provide them something valuable based on their own needs and challenges)*
5. Have you wished **Happy Birthday** or congratulated prospects on **promotions/ new jobs**?   
- *(Pro Tip: Find this info in the "Notifications" tab. New jobs = rollover opportunities)*
6. Have you **followed up with 1 person who hasn't gotten back to you about meeting**?   
- *(Pro Tip: Increase response rate by finding their email on [rocketreach.co](#))*
7. Have you **organized all important leads that you want to stay on top of**?   
- *(Pro Tip: Use a free CRM like [Hubspot](#) or upgrade to LinkedIn Sales Navigator)*





## ACTION PLAN - ADVANCED LEVEL

1. Have you **shared 1-3 pieces of content** that's helpful to your ideal client? 
  - (Pro Tip: Use free automation software such as Buffer to schedule posts & save time)
2. Have you **engaged (Liked or Commented) at least 15 pieces of content**? 
  - (Pro Tip: Go to the "Recent Activity" section of a prospect's profiles to find content)
3. Have you **found and connected with 25 new prospects** this week? 
  - (Pro Tip: Search for "2<sup>nd</sup> Degree Connections" of existing clients -> [How to Search](#))
4. Have you **sent 25 private messages** or emails to prospects this week? 
  - (Pro Tip: Provide them something valuable based on their own needs and challenges)
5. Have you wished **Happy Birthday** or congratulated prospects on **promotions/ new jobs**? 
  - (Pro Tip: Find this info in the "Notifications" tab. New jobs = rollover opportunities)
6. Have you **followed up with 5 people** who hasn't gotten back to you about meeting? 
  - (Pro Tip: Increase response rate by finding their email on [rocketreach.co](#))
7. Have you **organized all important leads** that you want to stay on top of? 
  - (Pro Tip: Use a free CRM like [Hubspot](#) or upgrade to LinkedIn Sales Navigator)

SHARE

1+

ENGAGE

15

CONNECT

25

MESSAGE

25