

CATHERINE MAYBREY COACHING SERVICES

Tutorial– Using LinkedIn Contacts Features

LinkedIn's contact features allow you to save notes and information about people you don't know or haven't met yet.

This will help you to track cold contacts, job or business leads, and network more effectively.

To start, select save to contacts in the bottom left under the “Connect” button. You’ll see that the example is a 3rd degree contact, not someone in my network yet.



Search for people, jobs, companies, and more...



Home

Profile

Network

Jobs

Interests

Invest in Yourself - 83% of employers looking for HR-related positions prefer ce



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Canada

Connect

Send [Redacted] InMail

7 connections

Save to Contacts



ca.linkedin.com/pub/[Redacted]

Everything you enter with Contacts is visible only to you. The person will never see anything or know that you added them. They will only know that you visited their profile (unless you are anonymous).

After you save the contact, a new section will open showing when they were saved, and giving options for Relationship & Contact Info.

★ Relationship

Contact Info

+ Note | Reminder | How you met | Tag

★ Saved as contact
12/7/2013

3 seconds ago

You can now add notes about this person, their organization, or why you're saving their profile.

Select “Note,” type in the text box, and hit “Save” when you’re done.

★ Relationship

📄 Contact Info



📄 Note

🕒 Reminder

🤝 How you met

🏷️ Tag

Information that you want to remember about this contact
e.g. if you reached out to them & why
what they are looking for or interested in
any additional info you have on them

Save

Cancel



This information is only visible to you.



Saved as contact

3 seconds ago

🔒 12/7/2013

You can also set a Reminder for when you want to follow up or take action. LinkedIn has preset timeframes, or you can select “Recurring” to customize the date.

★ Relationship

Contact Info



Note

Reminder



How you met



Tag

Send a follow up email after initial outreach
Update after informational interviews
Maintaining contact with people you've met

In 1 day In 1 week In 1 month **Recurring**

Save

Cancel

✓ Every week

Every month

Every 3 months

Every 6 months

Every year



Saved as contact

🔒 12/7/2013

3 seconds ago

days Save

If you have already met your contact, you can enter details under “How You Met.”

If someone introduced you, enter their name under the main textbox. Their profile will link if you are connected.

★ Relationship

📁 Contact Info



📄 Note

🕒 Reminder

🤝 **How you met**

🏷️ Tag

LinkedIn Group Discussion
Networking or Professional Event
Cold Contact

Name of LinkedIn Contact (Profile will appear) or you can type notes about referral

Save

Cancel



This information is only visible to you.



Saved as contact

3 seconds ago

🔒 12/7/2013

The “Tag” feature will help you sort your contacts so you will be able to find them again later. Click Tag and select from your list.

You can Add tags to create new categories, or
Manage existing categories.

★ Relationship

📄 Contact Info

🏷️ Networking Leads



📄 Note | 🕒 Reminder | 🤝 How you met

🏷️ Tag



Saved as contact

🔒 12/7/2013

- classmates
- colleagues
- friends
- group_members
- partners
- Networking Leads

3 seconds ago

+ Add new tag

⚙️ Manage tags

When you select “Manage Tags” it will bring up a new screen. Edit any of the existing tags by clicking on the pencil icon. Remove tags by clicking the X.

In the example, “Networking Leads” was changed to “Finance Networking Leads.” Making tags more specific will help you remember how you find them again later.

Manage Tags

Edit or delete your tags

classmates



colleagues



friends



group_members



partners



You can also save contact information that you might have from a website or business card. Then you don't have to worry about losing the card, or changes to webpages.

Select “Contact Info” and then “Edit Contact Info.”

★ Relationship

 Contact Info

Finance Networking Leads



 LinkedIn

[ca.linkedin.com/pub/\[redacted\]](https://ca.linkedin.com/pub/[redacted])

 [Edit contact info](#)


A new section will open, and you can enter all the details you have for your contact.

★ Relationship


 Contact Info


Finance Networking Leads


Email  whatever@email.com

Phone  555-555-5555 (Work)

Birthday 

Address 

IM 

Source 

 Website



Done editing



Edits you make to contact information are only visible to you.

If you want to remove a contact, go to “Network” on the top navigation bar and select “Contacts.”



Search

Home

Profile

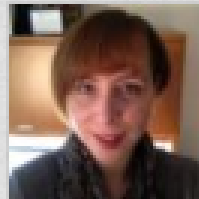
Network

Jobs

Contacts

Add Connections

Find Alumni



Share a

You can now filter your search by Tag to find the right profile. In the example, the tag was “Finance Networking Leads.”

When the profile comes up in your results, click “More” and select “Remove from Contacts.”

Sort by Recent Conversation ▾

Filter by Finance Networking Leads ▾

Select All



 Finance Networking Leads

 Tag

 Message

 Connect

 More ▾

Remove from Contacts

LinkedIn will ask you to confirm, and remind you that you will lose all saved information if you delete the contact. Select Remove.

Remove [REDACTED] from Contacts



Are you sure you want to remove this contact?

You'll lose:

- Your relationship notes
- All contact information about this person

Remove

Cancel

That's all there is to it. You can now add, manage, remove and re-add contacts however you see fit.

Hope you enjoyed this LinkedIn Tutorial. For more resources, or assistance with your profile, please contact cate@cmcoachingservices.com.

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