



LinkedIn Outreach Automation

Systematic prospecting that identifies your ideal prospects, sends personalized connection requests, delivers automated follow-up sequences, and tracks engagement. We build targeted searches based on your criteria (*job changers, business owners, high-income professionals, long-tenured employees*), manage the daily outreach, extract contact data from accepted connections, and notify you when hot leads respond. You handle the conversations, we handle filling your pipeline.

What's Included:

- Custom prospect searches tailored to your ideal client profile
- Automated connection requests (200-400 per month, depending on package)
- Compliance-approved messaging sequences (*Automated Outreach Package)
- Contact data extraction from accepted connections
- Monthly performance reports (acceptance rate, response rate, connections made)
- Hot lead notifications when prospects engage

What You'll Need:

- LinkedIn Sales Navigator subscription (\$119.99/month, billed by LinkedIn)
- Time to respond to interested prospects

Social Media Content Operations

We deliver compliance-approved posts per month. We create custom branded graphics, load everything into scheduling software for automated posting across platforms, and ensure all content meets regulatory requirements if applicable.

Turn-key solution that RIA firms can offer to their advisors or individual professionals can use to maintain a consistent social presence without daily effort.

What's Included:

- Branded social media posts monthly
- Custom graphics designed and branded to your firm
- Compliance review for financial services (if needed)
- Scheduled across your chosen platforms
- Multi-platform formatting (LinkedIn, Facebook, Instagram)

Implementation & Training

We don't just set it up and disappear. Every system includes complete documentation, video walkthroughs, and training so you or your team understands how to monitor performance, adjust targeting, and maintain the system.



Pricing

LinkedIn Outreach - Network Builder

\$450/month

- Choose 1 custom prospect search. 200 connection requests per month (10/day).
- Contact data extraction.
- Monthly performance tracking.
- You handle follow-up conversations.

Requires LinkedIn Sales Navigator (\$119.99/month, billed separately by LinkedIn)

LinkedIn Outreach - Automated Outreach

\$850/month

- Everything in Network Builder,
- PLUS: Choose 1 compliance-approved messaging sequence (Job Change Congratulations, Tax Planning Urgency, Retirement Readiness Check, or High-Earner Tax Strategy).
- 400 connection requests per month (20/day).
- Automated follow-up messages.
- Hot lead flagging when prospects respond.

Requires LinkedIn Sales Navigator (\$119.99/month, billed separately by LinkedIn)

****White-label rates available for RIA firms. Individual professional rates available.***

Social Media Content - Essential

\$300/month

- 4 branded posts per month, scheduled across your chosen platforms.
- Custom graphics designed for your brand.
- Our content has been reviewed by a compliance team, but please confirm with your RIA if additional review is required prior to scheduling.

Social Media Content - Professional

\$500/month

- 8 branded posts per month, scheduled across your chosen platforms.
- Custom graphics designed for your brand.
- Our content has been reviewed by a compliance team, but please confirm with your RIA if additional review is required prior to scheduling.