



Here's a step-by-step example of how to approach a potential lead from a conference attendee list.

Situation: I'm headed to a big industry conference and I have a list of the attendees. From this list, I'm focusing on key executives from customers in my target segment to set an introductory meeting at the conference.

For this case example, I'm using an example from when I worked at Blend Labs, selling enterprise software to mortgage lenders. The conference I'm attending in the Mortgage Bankers Association Technology Conference.

Here's a view of how the attendee list is structured:

	A	B	C	D	E
1	Brian	Abbott	Director of Strategic Initiatives	Mortgage Builder Software	MI
2	Jennifer	Abraham	Sales Associate	Hyland Software, Inc.	OH
3	Dennis	Adama	President & Chief Executive Officer	Compliance Systems, Inc.	MI
4	Bill	Adamowski		CoreLogic	TX
5	Terry	Aikin	Regional Sales Lead	Accenture Mortgage Cadence	MI
6	Eric	Aizer	Chief of Staff	Move, Inc.	CA
7	Ed	Albrigo	Managing Director	Hilltop Advisors, LLC	VA
8	Mirka	Aldrich		Blueberry Systems, LLC	CO
9	Mike	Allegra	IT Manager	Pango Group	CA
10	Nancy	Alley	Vice President, Strategic Planning	Simplifile LLC	UT
11	Richard	Altman	Executive Vice President/Chief Operating Officer	Radian Guaranty Inc.	PA
12	Siv	Anantuni	Director	Radian Guaranty Inc.	PA
13	Cheryl	Anderson	Senior Product Manager	D+H	OR
14	Chris	Anderson	Chief Business Development Officer	LendingQB	CA
15	Craig	Anderson	Senior Sales Executive	D+H	WI
16	Keith	Anderson	Vice President - Sales	Optimal Blue	TX
17	Timothy	Anderson	Director of eServices	DocMagic, Inc.	CA
18	Antoine	Andraos	DC Director	Deloitte	VA
19	Richard	Andreano	Partner	Ballard Spahr LLP	DC
20	Jordan	Angelos	Investor	Accel Partners	CA
21	Ben	Ansolabehere	Sales	IDS, Inc.	UT
22	Robert	Anthony		Stearns Lending, Inc.	CA
23	Scott	Apfel	Executive Director	Morgan Stanley	NY
24	Eric	April	Business Development Manager	Clarifire	FL
25	Tom	Archambault	Information Officer	Firm Solutions, LLC	FL
26	Neil	Armstrong	Vice President, Business Development	Indecomm Global Services	NC
27	William	Armstrong	Chief Executive Officer	Blueberry Systems, LLC	CO
28	Kevin	Arndt	Marketing	Capsilon Corporation	CA
29	Amit	Arora	Senior Consultant	IB Technology Solutions Inc.	CA
30	Fred	Arrias	Publisher	Executive Agent Magazine	CA
31					

I use separate columns for first name, last name, title, and company so that I can sort in a variety of ways.

From the large list, I started by scanning and identifying executives at my target customer segment:

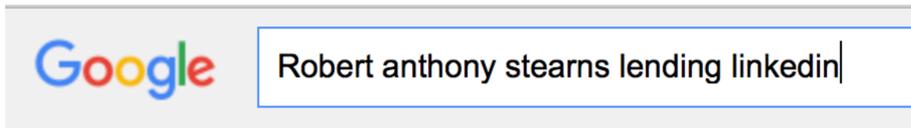


20	Jordan	Angelos	Investor	Accel Partners	CA
21	Ben	Ansolabehere	Sales	IDS, Inc.	UT
22	Robert	Anthony		Stearns Lending, Inc.	CA
23	Scott	Apfel	Executive Director	Morgan Stanley	NY
24	Eric	April	Business Development Manager	Clarifire	FL

Robert Anthony is at Stearns Lending, and I know from previous work in the mortgage industry and my customer development calls that Stearns would be the kind of company that would be perfect for our software, and at a minimum, I can learn a lot from a customer development interview.

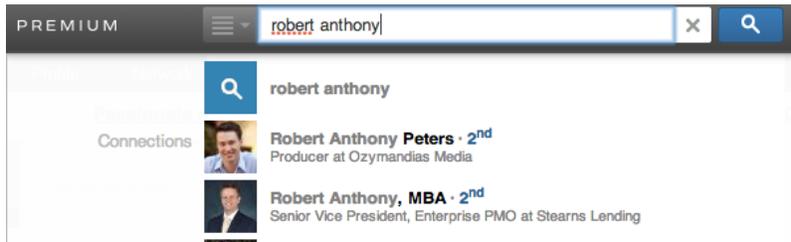
Next, I need to find Robert’s LinkedIn profile. Two ways I can do that:

I can either hop over to Google. This is usually my preferred method using the person’s name, company and the term “linkedin” in my search...



... or login to my LinkedIn account, and search for “robert anthony” there.

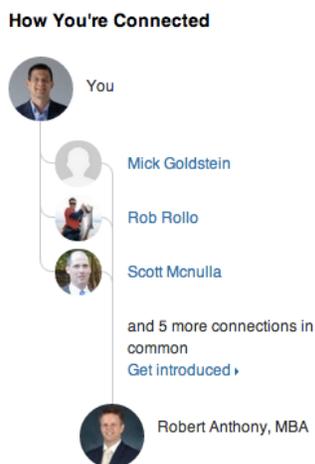
Woohoo! Looks like LinkedIn’s search worked pretty well there, identifying the “Robert Anthony” that I want - the one that is a Senior Vice President at Stearns Lending.



Let’s go to his profile next:



Good news - I'm a 2nd level connection of Robert's, so let's see how I'm connected:



Perfect! We have eight (8) common connections, and without going any further, I can see the exact person I'm going to mention in my message to Robert - Rob Rollo.

Rob Rollo and I worked together at CoreLogic and are good friends. In fact, Rob and I just happened to talk on the phone yesterday exchanging ideas talking shop about the mortgage industry. Perfect.

But... before I dive into sending Robert a note, I want to see what else I can learn from Robert's contacts and background here on his LinkedIn profile.

First, I click on the "Get introduced" link just to see how else I'm connected to Robert.

Here are the additional five (5) contacts Robert and I share:

	Lynn Halstead VP Wholesale Lending at Carrington Mortgage Services	40 Shared Connections
	John Nicholas CEO at Channel, LLC	17 Shared Connections
	Joe Tyrrell Senior Vice President, Business Development & Client Management at Ellie Mae	12 Shared Connections
	Liz Brandon Enterprise Sales Engineer at Capsilon Corporation	12 Shared Connections
	Scott Mcnulla Vice President, Regulatory	10 Shared Connections

I do know all of these people, and while they are common connections between



Robert and me, Rob Rollo is still the best bet for me to reference in my InMail to Robert.

Next, I review Robert's complete profile in sections.

Profile summary: Robert worked at Greenlight and Equator, and those ring a bell with me because I'm working with a potential client right now that was formerly an executive there and I know that Rob Rollo also used to work at Equator.

Work History: Next, I review the details of Robert's work history in the Experience section of his profile:

The screenshot shows the 'Experience' section of a LinkedIn profile. It lists four roles: Senior Vice President at Stearns Lending, Chief Information Officer at Greenlight Financial Services, Chief Information Officer (Interim/Consulting) at PMAC Lending Services, and Director at Equator, LLC. A recommendation from Rob Rollo is visible, mentioning their work together at Equator. Logos for Greenlight Loans, PMAC, and Equator are also present.

Okay, more information for me here. Robert was CIO at Greenlight after the former executive I know was there, which would explain why Robert and this executive are not connected on LinkedIn.

- I see that Rob Rollo gave Robert a recommendation for his work at Greenlight.
- Looking further down the Experience section, I see that Robert worked at Equator about the same time that Rob Rollo worked there.
- All of this fills in the story about why and how Robert and Rob know each other.
- Clearly there's a strong relationship there, further cementing my decision to reference Rob Rollo in my outbound message to Robert.

Education: I like to scope this section to see if there are any commonalities



among us - schools, programs, locations - anything that might be useful to reference or just know about.



Webster University

MBA, Business Administration and Management

2009 – 2012

Activities and Societies: Delta Mu Delta International Honor Society, Graduated in March 2012 with High Academic Honors

1 recommendation



Louis Columbus

Product Marketing at Plex Systems; Columnist at Forbes; Adjunct Professor Graduate Progra...

Rob's intellectual curiosity and passion for learning transforms classes, enriching each class session to the benefit of other students in the process. He has an innate ability to interpret highly complex case studies and strategic challenges... [View ↓](#)

California State University-Fullerton

Bachelor's Degree, Criminal Justice

1987 – 1989



At first, I don't notice anything. I'm not too familiar with Webster University. Hmm.... what else is interesting...? It is useful to see the dates of his graduation though.

Assuming Robert attended his undergraduate program right out of his school, the graduation date indicates that Robert is about 45 years old.

Also, it looks like he just recently finished his MBA - so that must have been a part-time program. I can empathize with him on this front, as I did the same - a part-time MBA while working full-time.

Recommendations: Bingo! Robert and Rob exchanged recommendations, so more proof they are good buddies for sure. I can also see that Robert has actively solicited recommendations (he's received 16) and has given out seven (7).

All of this, plus his 500+ connections, tells me that Robert is a power user of LinkedIn. He should receive and read my message if I include the right subject line and content.

Recommendations
Received (16) → Given (7)

Chief Information Officer
Greenlight Financial Services

Rob Rollo
Manager, Advisory Strategic Research

Robert and I worked together at Equator and it has been a pleasure to follow the progression of his career over the last few years. Robert is a methodical and dedicated employee with a passion for improving processes which directly affect the bottom line. He constantly strives to improve his position, education, and company, while creating a rewarding and balanced... **more**

April 30, 2013, Rob was with another company when working with Robert at Greenlight Financial Services



Constructing an InMail

I like to open another tab with the profile open so I can refer to it as I'm building my message to him. Here's my note to Robert:

Hi Robert - I see that we both know Rob Rollo pretty well. Rob and I worked on the same team at CoreLogic, and in fact he and I just talked on the phone yesterday.

I came across your profile while reviewing this week's MBA Tech Conference attendee list. With your experience in the technology and systems facet of the loan origination process, I thought you'd be a perfect person to ask...

I work with Blend Labs - a mortgage tech startup in San Francisco - focusing on improving the customer experience with technology during the application process. We're still very much in early development, and right now we have several product ideas that we need to prioritize.

Would you happen to have a few minutes at the conference to ask you few quick questions about these ideas?

I am sorry to say that can't offer much right now except a Starbucks (or maybe a good Scotch or microbrew if you like...)

My best times to meet at the conference right now are:

Wed, b/t 1-3pm or 5:30-6:30pm

Thurs, b/t 9-10am or 3-4pm

We can meet at the JW Marriott lobby concierge desk and find a spot from there.

Many thanks for reading this far, and I'd really appreciate 20 minutes of your time.

*-Scott Sambucci
mobile: (415) 596 0804
scott@blendlabsinc.com*



Notice the structure:

- Subject: specific to his area of expertise
- Intro: Started strong with reference to Rob Rollo
- Body: How I found him
- Body: Why I'm contacting him
- Body: Specific request
- Body: Humor to show human element and personality
- Conclusion: Specific times to save on back and forth. What if he is excited and replies back with "what time?" Well, I'd be kind of in bind b/c it's 7am on Tuesday at this moment and I'm about to hop to the airport to get to LA. Then I have meetings. Instead, give the person times and a place so they can reply back with - "Great - let's do 3pm on Thurs. See you at the lobby."
- Signature: Includes my contact relevant contact info. Think about how email works. He'll see this message in his inbox and retain it even if he archives. This way if he needs to retrieve or search, he has my phone number and email super handy.

Total Word Count: 219. Maybe a little long if this was mostly cold, but I feel confident in the message, so I'm going to send. I've use parts of this email successfully in other InMails.

Robert's Reply

RE: Mortgage tech questions re: wholesale lending

Scott - I will be in quite a few of the seminars on W and TH. The best hing we can do is spend a few minutes together on foot. zyou can connect with me directly at ranthony@stearns.com and we can see about meeting tomorrow.

Boom! Meeting set.



Here are a two more examples of InMails I sent for a similar conference

Person contacted: <https://www.linkedin.com/in/shelly-griffin-8a4a018>

My InMail message:



InMail · Expertise request

Could use your help on non-prime compliance questions

October 13, 2014 9:45 AM

Hi Shelly - I came across your profile from the MBA conference list, read about recent experience at Deephaven and Wells Fargo, and thought you'd be a good person to ask...

Would you happen to have ~20 minutes next week for a few questions around the risk and compliance side of non-prime mortgages?

Our company - Blend Labs - is an early stage mortgage technology company, and as software people, we've been specifically trying to understand more about the risk management and compliance side of mortgages.

Unfortunately I can't offer much in return for your time right now except Starbucks and good karma.

Many thanks for reading this far and I hope you'll have a few minutes next week to chat.

Kind regards,

-Scott Sambucci
scott@blendlabsinc.com
(415) 596 0804

Response:

Hey Scott, I'm sorry I just got this. I hope you were able to connect with someone at the conference. Let me know if you have any further questions.

Sent from LinkedIn for iPhone
<http://lnkd.in/ios>

***This response came after the conference, so at least I was able to do a call post-conference with a new connection.*



Person Contacted: <https://www.linkedin.com/in/michaelsrhoden>

My InMail Message:

Hi Michael - I came across your profile reading the MBA Mortgage Tech conference attendee list, and read a bit about your background with Agile/Scrum and mobile apps.

Our company - Blend Labs - is an early stage mortgage tech company. I think you'll be impressed by what we've built so far and the open source approach we're taking: <http://www.blendlabsinc.com/about>

Our product ideas for the mortgage industry are still very much in development, which is why I'm getting in touch. We're taking a "lean startup" approach, and this month, we're running through product sprints on a few ideas and we need to get feedback from industry executives on these.

I can't offer much in return for your time right now except Starbucks and good karma. Although well-funded, we are a start-up after all... I've also talked a bit with Ben Jackson at Franklin American recently. I think he'll tell you I'm good people.

I'll be at the MBA conference next week, and hoped you might be willing to set aside 15-20 minutes for these strategic questions.

Many thanks for reading this far and I hope I'll have the chance to meet and learn from you.

Kind regards,

-Scott Sambucci
scott@blendlabsinc.com
(415) 596 0804 - [See less](#)
📅 3/11/2014

Response:

RE: Question re: process improvement for mortgages

We can talk for a bit in LA. I'm staying at the JW, so maybe let's meet for coffee Wed morning maybe 60-90 minutes before the first speaker. I'll let you scope out a place, just somewhere walking from the JW. My cell is 615-308-6330, just text me your info. If you have some specific questions you want me to give any real thought, email to me at mrhoden@franklinamerican.com.

-Michael