FREE CHECKLIST - BY AKANKSHA JAIN

LinkedIn GTM Review Checklist

Use this before a LinkedIn outbound or social-selling motion goes live. The goal is not to slow the team down. The goal is to make sure every external action has a clear reason, owner, and review point.

Latest copy: https://linkedboost.ai/linkedin-gtm-review-checklist
On LinkedIn, comment "review" on Akanksha Jain's checklist post to ask for the PDF and compare notes on your first pilot.

1. ICP Clarity

- Who is the exact segment?
- What company type, size, market, and role are in scope?
- What is the exclusion rule?
- What visible signal makes this person relevant now?
- Can we explain why this person belongs on the list in one sentence?

Fit sentence: This person owns [problem] at [company type], and [signal] makes the timing relevant.

2. List Review

- Review 10 to 25 profiles before drafting any sequence.
- Mark each profile as yes, no, or unsure.
- Add one fit reason for every yes.
- Add one disqualifier for every no.
- Remove unclear ownership, weak fit, duplicates, old roles, or prior opt-outs.

Useful test: Would we still contact this person if we had only 20 invites this week?

3. Prior Context

- Check whether the person is already connected.
- Check whether there is a pending invite.
- Check whether there was a previous conversation.
- Check whether anyone on the team already knows them.
- Stop for opt-outs, negative replies, account mismatch, or unclear ownership.

4. First Message Review

- Does the message reference a real signal?
- Is the reason for outreach clear in the first two lines?
- Is the message short enough to read quickly?
- Does it avoid generic praise?
- Does it avoid fake urgency, emojis, and vague personalization?
- Can a human approve it without rewriting the whole thing?

Good opener: Saw [specific signal]. It connects to [problem/context]. I am working on [relevant area]. Thought it was worth comparing notes.

5. Reply Handoff

- Who reads replies?
- Who decides whether to reply, clarify, hand off, or stop?
- What counts as a qualified conversation?
- What objections should be logged?
- How quickly should a real reply be answered?

Reply rule: Any reply stops the sequence until a person reviews it.

6. Account And Risk Checks

- Confirm the correct sender account.
- Confirm daily and weekly headroom.
- Confirm the current account state.
- Confirm the final action after it runs.
- Do not treat warm-up, caps, or review as a guarantee against restrictions.

SMALL PILOT

Use this as the operating sheet before the first batch.

Keep the pilot intentionally small: one segment, one shortlist, one first-message angle, one reply owner, one review date.

7. Learning Loop

- Which fit reasons produced replies?
- Which segment was too broad?
- Which opener felt too generic?
- Which objections repeated?
- Which profiles should have been excluded?
- What should change before the next batch?

Segment	
Target count	
Exclusion rule	
Fit signal	
First-message angle	
Reply owner	
Stop conditions	
Review date	

LINKEDBOOST NOTE

Keep the review points visible.

LinkedBoost helps teams prepare and inspect LinkedIn workflows through connected tools. The useful habit is the same with or without software: keep the review points visible, keep the account owner in control, and verify the final state before reporting progress.

LinkedBoost is independent from LinkedIn and does not imply LinkedIn approval.

Checklist page: https://linkedboost.ai/linkedin-gtm-review-checklist
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