Research done. Next step clear.



IndieCRM

People. Deals. Follow-ups.

A prospecting workflow for small B2B teams

IndieCRM

Three choices before you search

01 **Company**

ExampleCo

02 **Job role**

Product lead

03 **Person location**

Berlin

Illustrated criteria. ExampleCo is fictional.

People search requires an explicitly enabled Sales Navigator connection.

IndieCRM

The review makes the list

Current role

Check whether this person fits the work you want to discuss.

Useful context

Know why this person belongs on your list before you add them.

Right workspace

Keep each client or team’s prospecting in its own workspace.

IndieCRM

Your list.
Your decision.

Select people before Add to pipeline.

Illustrated example. Demo data.

Alex Example

SELECTED

Product lead at ExampleCo

Riley Example

LEFT OUT

Operations at ExampleCo

Profile review never sends LinkedIn invitations or messages.

IndieCRM

A saved search keeps the starting point

Keep useful search criteria.
Return when you need another review.

Company	**ExampleCo**
Job role	**Product lead**
Person location	**Berlin**

Illustrated criteria. Demo data.

IndieCRM

A clearer next step for each conversation

Find the person.

Keep the deal context.

Decide your next follow-up.

People, deals and the next conversation.

Explore IndieCRM

indiecrm.app