A FREE GUIDE FOR B2B FOUNDERS

Louie Bernstein's

LinkedIn® Sales Playbook

A step-by-step system for B2B founders who want LinkedIn to bring them customers, not just followers.

Louie Bernstein

Fractional Sales Leader · Inc. 500 Founder · LinkedIn Top Voice

LouieBernstein.com

Notes: LinkedIn is a proprietary platform. Their algorithm can change overnight. What works today may not work tomorrow. I will do my best to keep this playbook up to date.

I do not work for, and I am not paid by LinkedIn. These strategies are strictly mine to help you succeed on LinkedIn's platform.

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Get my advice!

About Louie Bernstein

BEFORE YOU START

Why LinkedIn, and why this playbook

All of my business over the last several years has come in from LinkedIn. Here's how.

I started posting on LinkedIn in April 2022. I had decades in business behind me. I still felt like I was shouting into the void.

I posted every day. I shared stories from 50 years in sales and business. I gave away the best advice I had.

For five straight months, the result was zero. Not one customer. Not one serious inquiry.

In the fifth month I almost didn't post. I had made a promise to myself to stick to the process, so I wrote about a simple lesson my father taught me. The next day an email came in: "I've been following you for a few months. Your post today hit home. Can we talk?"

In one week I had three contract inquiries and signed two new clients. Today all of my business comes inbound from LinkedIn, plus the outbound of making connections with people I can help.

That didn't happen because I got lucky. It happened because I worked a process. This playbook is that process, written down so you and your team can run it.

LinkedIn is the world's largest B2B marketplace

If you sell B2B, odds are your customers and your prospects are on LinkedIn. To me, LinkedIn is the world's largest university, and it's free. Plus, you can get customers.

But most founders treat it one of two ways. They ignore it. Or they connect with someone and pitch them in the first message. Neither works.

Who this is for

- Founders of B2B companies, roughly $1M to $10M in revenue, who still close most of the deals.
- The first salespeople they hire, who need a written process to follow instead of guessing.
- Founders who want LinkedIn to keep bringing in business when they step back from selling.

How to use it

Work the ten steps in order. Don't skip Steps 1 and 2. Every step after them depends on knowing who you're talking to and having a profile that does the selling when you're not on the call.

Each step ends with homework. Do the homework before you move on.

THE ONE RULE

Like. Trust. Buy.

It's always in that order. LinkedIn doesn't change that. It just makes it visible.

People need to like you before they trust you. They need to trust you before they buy from you. The order never changes.

LinkedIn is a social network. It's a business social network, but it's still social. You don't ask someone to marry you on the first date.

It happens. I got engaged within six weeks. But even that took a little courting. Prospecting on LinkedIn works the same way.

> **WHAT THIS LOOKS LIKE ON LINKEDIN**
>
> **Like:** They see your comments and posts. Your face and your name start to feel familiar.
>
> **Trust:** They visit your profile and read what you think. They start to see you know what you're talking about.
>
> **Buy:** They reach out, or they say yes when you ask for a conversation. Then you sell.

Every step in this playbook moves a prospect one notch along that line. None of them skip it.

The playbook at a glance

Step	What you do	Time it takes
1	Know exactly who you want to talk to	2 hours once. Review every quarter.
2	Turn your profile into your best salesperson	2 to 3 hours once
3	Build a content engine your buyers want to read	About 2 hours a week
4	Connect with intention	10 minutes a day
5	Comment before you sell	15 minutes a day
6	Write DMs that start conversations	10 minutes a day
7	Run Sales Navigator as your pre-sales funnel	10 minutes a day
8	Move it to a meeting and into your CRM	As conversations come in
9	Put your sales team on LinkedIn	15 minutes a week of coaching
10	Work the daily rhythm, track it, keep going	20 minutes a week to review

Step 1. Know exactly who you want to talk to

Followers and buyers are different people. Build for buyers.

A while back I hit 15,000 followers. That was the good news. The bad news: only about 21% of them fit my Ideal Customer Profile (ICP).

I was grateful for every one of them. But a big audience that can't buy from you doesn't pay the bills. So I changed my focus. I started growing the trust of 1st-level connections I can learn from, I can help, and I can do business with.

There are lots of people on LinkedIn who will teach you how to grow followers fast. Don't chase that. Make your ICP crystal clear, and don't deviate.

Write your ICP card

Fill this in before you send one connection request. Everything else in this playbook uses it.

Field	What to write	Example
Titles	The exact titles of the person who signs	Founder, CEO, Co-Founder, Owner
Company size	Revenue band and headcount	$1M to $10M revenue, 10 to 75 employees
Industry	Where you win most often	B2B software, professional services
Geography	Where you can sell and serve	United States
Their pain this week	What keeps them up at night, in their words	"I'm still closing every deal and I can't step away."
Trigger events	What makes them ready to talk now	New funding, first sales hire, missed quarter, new job
Who they listen to	People and groups that influence them	Their investors, their peers, a few industry voices
Not a fit	Who you will walk away from	Pre-revenue startups, companies over $50M

HOMEWORK

Write your ICP card. Then pull your last ten customers and check them against it. If most don't fit, your card is wrong, not your customers.

Step 2. Turn your profile into your best salesperson

Every comment and post you make sends people to your profile. Your profile is the sales call you don't have to be on.

When someone in your industry wants advice, you want them to think of you, go to your profile, and see what you think. That's how they start to understand you know what you're talking about. And that's one of the key steps in building trust.

Most founder profiles are written for a recruiter. **Rewrite yours for a buyer.**

Profile checklist

Section	What to do	Limit
Photo	Recent. Your face fills most of the frame. Good light. You look like someone they'd meet with.	—
Banner	Who you help, the result, one proof point, your website.	—
Headline	Who you help + the result + proof. Not just your job title.	220 characters
About	Five blocks: their problem, your story, how you help, proof, next step. Write it to one reader.	2,600 characters
Featured	Your best lead magnet, your best post, and your booking link.	—
Services	List what you sell so LinkedIn can show you in service searches.	—
Experience	For your current company, describe the customer's result, not your duties.	—
Recommendations	Ask three happy customers. Self-praise is no recommendation.	—
Custom URL	linkedin.com/in/yourname or a phrase that says what you do.	—

Headline formula

> **FORMULA**
> [Who you help] + [the result they get] | [proof]

MINE, AS AN EXAMPLE

Fractional Sales Leader for Founder-Led Sales Teams | Inc. 500 Founder | LinkedIn Top Voice

FOR A B2B FOUNDER

Helping regional HVAC contractors cut dispatch costs | Founder, [Company] | 200+ contractors served

About section, in five blocks

- **Their problem.** Open with the pain your buyer feels this week, in their words.
- **Your story.** Why you care. Where you've been. One or two real details.
- **How you help.** Plain words. What you do and what changes for them.
- **Proof.** Numbers, years, customer results (with permission).
- **Next step.** One clear action: book a call, grab a resource, send a DM.

THE 10-SECOND TEST

Show your profile to a customer for 10 seconds. Close it. Ask: "What do I do, and who do I do it for?" If they can't answer, rewrite the headline and banner.

Step 3. Build a content engine your buyers want to read

You need to be the thought leader for your industry on LinkedIn. Content is how you get there.

Connections see your posts. Over time they start to feel like they know you. That's the "like" and the start of the "trust."

One of the biggest mistakes I see founders make is not being present on LinkedIn at all. Don't let *impostor syndrome* stop you. If you've been in your industry a while and you've run a business, you have something to share that your buyers will find valuable.

Pick four content pillars

My best performers are personal stories about mistakes and tactical frameworks. Build around those, then add two more.

Pillar	What it is	Example from my posts
Stories	A mistake, a lesson, a moment that changed how you work	Faxing a proposal from a Club Med resort while my family waited
How-to	Checklists, numbered steps, a framework they can use today	My 12-step sales manager's checklist
Point of view	Take a side. Don't say "I think."	"Sales pipeline meetings are a waste of time. They are, if you're doing them the wrong way."
Proof	Customer results, before and after, behind the scenes	A client who stepped out of every sales call in 90 days

How often to post

I post every day. You don't have to start there. Start with three posts a week and hold it for 90 days. **Consistency beats volume**. People are watching, even when they're silent. They're waiting to see if you'll keep showing up.

A simple week: two how-to posts, one story, one point of view, one proof post when you have it.

Anatomy of a post that gets read

- **Lines 1 and 2 are the hook.** The feed cuts the post off after the first couple of lines, so the point has to be there. In my posts, a number or a percentage in the first two lines does better.

- **One idea per line.** Short lines. White space between them.
- **One detail only you could write.** A year, a name, a number, a story.
- **Take a side.** Fence-sitting doesn't get comments.
- **End with one real question.** "What would you add?" "Has anyone else seen this?"
- **Put links and calls to action in the first comment,** not the post.
- **Skip hashtags and emojis.** They make you look like everyone else.

A post that worked, taken apart

> **POST**
>
> Sales pipeline meetings are a waste of time.
>
> They are, if you're doing them the wrong way.
>
> Too many salespeople put the prospect into a stage based on what they think, or hope, will happen.
>
> The stage a prospect is in needs to be earned by an action the prospect has taken.
>
> A good pipeline meeting, even 15 or 20 minutes once a week, can flush out if a salesperson is using ***hope-ium*** as a strategy.

- Line 1 is a blunt, contrarian claim. Line 2 turns it. That's the hook.
- "Hope-ium" is a coined word people remember and repeat.
- It's a problem every founder running a pipeline meeting feels this week.

Formats to use

- **Text posts.** The workhorse. Fast to write, easy to read.
- **Video.** It's a twofer. The same video goes on YouTube and LinkedIn. YouTube keeps it searchable for years, so it sells for you while you sleep.
- **Document posts (carousels).** Good for checklists and frameworks.
- **Articles and a newsletter.** For depth. Subscribers get notified when you publish.

Your weekly content hour

Block 60 to 90 minutes once a week. Pick topics, draft, schedule.

- Every question a customer asks you is a post. Keep a running list.
- Every mistake you made and fixed is a post.
- Every objection your team hears is a post.
- After you publish, stay around for the first hour. Reply to every comment. That's where conversations start.

HOMEWORK

Write ten post ideas from customer questions. Draft three. Schedule them for next week.

Step 4. Connect with intention

Every connection should be someone you can help, learn from, or do business with.

As you make connections, they start to see your posts and your content. They start to build a relationship with you. That only works if you connect with the right people.

Who to connect with

- **Your ICP.** The people on your ICP card from Step 1.
- **The people your ICP listens to.** Their investors, partners, peers, and industry voices.
- **People who engage with you.** Anyone in your ICP who comments on or reacts to your posts.

The rules

- **If time allows send a personal note.** Try not use LinkedIn's generic request. It tells them you didn't care enough to take the time. My personal experience according to the metrics I keep, it doesn't make much of a difference. Just make sure your Profile and About sections make it clear who you are, who you help, and the results they can expect. They can go there from the connection request.
- **Keep the note under 200 characters.** That's LinkedIn's limit.
- **Free accounts only get a few personal notes a month.** If you're serious about selling on LinkedIn, get Premium or Sales Navigator.
- **Respect the weekly cap.** LinkedIn doesn't publish it, but most accounts hit a wall at about 100 invitations a week. Send 15 to 20 each weekday and you'll stay under it.
- **Never pitch in the note.** Not a link. Not a hint.
- **Clean up.** Withdraw invitations that sit unanswered for one month.

Connection notes that get accepted

> **THEIR POST (160 OF 200 CHARACTERS)**
> Hi Dana, your post on hiring your first two reps hit home. I went through the same thing building my company. I'd like to follow your thinking. Glad to connect.

> **SHARED EXPERIENCE (144 OF 200 CHARACTERS)**
> Hi Marcus, I see you're growing [Company] past the founder-sells-everything stage. I spent 22 years doing that myself. Would be glad to connect.

MUTUAL CONNECTION (112 OF 200 CHARACTERS)

Hi Priya, Sam Ortiz and I talk often about scaling sales teams, and your name came up. Would be glad to connect.

THEY ENGAGED WITH YOU (114 OF 200 CHARACTERS)

Hi Tom, thanks for the comment on my pipeline post. Your point about weekly reviews was a good one. Let's connect.

SAME EVENT OR GROUP (133 OF 200 CHARACTERS)

Hi Lauren, we were both at the SaaS founders meetup in Atlanta last week. I liked your question on pricing. Let's stay in touch here.

HOMEWORK

Send 15 personal connection requests a day for the next two weeks. Only to people who fit your ICP card.

Step 5. Comment before you sell

A good comment is prospecting in public. It's often the first time a prospect notices you.

When you comment on a prospect's post, they see it. So does their network. A thoughtful comment shows how you think, and it costs you nothing but a few minutes.

The daily routine

- Spend 15 minutes a day commenting on five to ten posts.
- Pick posts from people on your ICP card and the people they listen to.
- Use your Sales Navigator lead lists and alerts to find them (Step 7).
- Get there early. A comment in the first hour gets seen more than one the next day.

The comment formula

Agree or push back, add one thing from your experience, and ask a question if it fits. Two to four sentences.

> **ADDS TO THE POST**
> Agree on the weekly pipeline review. One thing I added with my teams: a prospect only moves to the next stage when they take an action. It cut our surprise losses.

> **RESPECTFUL PUSH BACK**
> I see it a little differently. I'd hire two salespeople, not one. If one doesn't work out, you still have a comparison, and you haven't lost six months. How did you decide on one?

> **STORY**
> This happened to me in the '90s. I was faxing a proposal from a resort in the Bahamas while my family waited. That was the day I knew I had to build a sales team.

What not to do

- "Great post!" "So true." "Thanks for sharing." They add nothing and nobody remembers them.
- Pitching or dropping links in someone else's comments.
- Arguing to win. Disagree with respect, then let it go.

Your own comment section

Reply to every comment on your posts. Ask a follow-up question. When someone in your ICP comments, that’s a warm lead. Send a connection request or a thank-you DM the same day.

> **HOMEWORK**
> Leave ten real comments this week on posts from people on your ICP card. Note which ones got a reply.

Step 6. Write DMs that start conversations, not pitches

What you don't want to do is connect with someone and then try to sell them. It doesn't work that way on LinkedIn.

Most LinkedIn DMs are a pitch in the first message. Everyone hates them. Your job is to start a conversation and keep earning the right to the next one.

The DM sequence

#	When	What you send	What you never send
1	They accept your request	A short thank-you. No pitch.	A calendar link
2	The next two to three weeks	No DM. Comment on their posts instead.	"Just checking in"
3	When you see something useful for them	A resource, an intro, an idea. No ask.	A sales deck
4	When they engage, change jobs, or post about your problem	A note about that event, plus one question	A template that could go to anyone
5	When the conversation is going	Ask about their world. Listen.	Your features
6	When they show interest or ask	Offer a 20-minute call to see if it makes sense	Pressure

The rules

- Keep DMs short. If it doesn't fit on a phone screen, cut it.
- Make it about them. Count the I's and You's. You's should win.
- One question per message.
- Never say "I was just following up" or "I was just checking in." It screams amateur. Every follow-up delivers something that helps them.
- No attachments in the first message.

DM templates

1. THANK-YOU AFTER THEY ACCEPT

Thanks for connecting, Dana. I liked your post on hiring your first reps. I write about getting founders out of the middle of every sale, so we'll probably cross paths in the comments. Glad to be connected.

3. VALUE, NO ASK

Dana, you mentioned onboarding your new reps next month. Here's the two-week onboarding checklist I used at my company. No strings. Hope it saves you a few hours.

4A. THEY ENGAGED WITH YOUR POST

Tom, thanks for the comment on the pipeline post. You said your team reviews deals monthly. Curious: what made you pick monthly over weekly?

4B. JOB CHANGE

Congrats on the new role at [Company], Priya. First 90 days as a sales leader is a lot. What's the first thing you're trying to fix?

6. THE ASK

Marcus, sounds like you're still on most of the sales calls and it's keeping you from the rest of the business. I've helped a few founders get out of that seat. Worth a 20-minute call to see if any of it fits?

Let them DM you first

Some of my best DMs start in a post. I end a post with an offer like: "Connect and DM me for a sample of my sales onboarding strategy. Just mention STRATEGY in the DM." The people who send that word raised their hand. Reply fast and deliver what you promised.

REPLY TO A KEYWORD DM

Here you go, Sam: [link]. It's the same onboarding plan I used so new reps knew exactly what to do for their first two weeks. What's your biggest onboarding headache right now?

InMail

InMail reaches people outside your network. Sales Navigator gives you 50 credits a month, and you get the credit back when someone replies within 90 days. So write InMails people want to answer. Same rules as DMs: short, about them, one question.

> **HOMEWORK**
> Send a thank-you DM to everyone who accepted your requests this week. No pitch. Write down who replied.

Step 7. Run Sales Navigator as your pre-sales funnel

If you're selling on LinkedIn and not using Sales Navigator, you're probably missing some sales.

Sales Navigator is how I find founders who spend too much time in the sales department. I run it as a pre-sales funnel: a pipeline that comes before the pipeline in my CRM.

Which plan

Plan	Who it's for	What matters
Core	A founder or one salesperson	Advanced search filters, saved searches with alerts, lead and account lists, 50 InMail credits a month. About $120 a month at list price.
Advanced	Teams of two or more	Adds TeamLink (see your team's connections), Account IQ summaries, and buyer intent. About $160 per seat a month at list price.
Advanced Plus	Larger teams	Adds CRM sync. Custom pricing.

Prices change. Check LinkedIn's pricing page before you buy.

Set it up in one afternoon

1. Set your sales preferences. Geography, industry, and function. Sales Navigator uses them to recommend leads that fit your ICP.

2. Build an account search. Use company headcount, industry, and headquarters location from your ICP card. Save the companies to an account list called Target Accounts.

3. Build a lead search. Seniority (Owner or Partner, CXO), title keywords (Founder, CEO, Co-Founder), company headcount, and geography. Then use the spotlight filters at the top, like recent job changes, recent LinkedIn activity, and shared connections. Save the search so new matches come to you each week.

4. Build lead lists that match your funnel stages. See the table below.

5. Read your alerts every morning. Job changes, posts, and company news are your reasons to reach out.

My pre-sales funnel

Every stage is earned by an action. Not by what you hope will happen.

Stage	The action that moves them here	Lead list name
Fits the ICP	You found them and they match your ICP card	01 ICP Fit
Request sent	You sent a personal connection request	02 Requested
Connected	They accepted. You sent a thank-you.	03 Connected
Engaging	You're commenting on and reacting to their posts	04 Engaging
Warm	They engage with your content or reply to a DM	05 Warm
Conversation	They reach out or agree to talk about an opportunity	06 Conversation, then into the CRM

The 10-minute daily Sales Navigator routine

- Check alerts. Note job changes and posts from people in your lists.
- Open saved search results. Add new ICP fits to list 01.
- Send today's connection requests from list 01. Move them to 02.
- Move anyone who took an action to the next list.

> **STAY OUT OF LINKEDIN JAIL**
>
> Don't use bots or automation tools to send requests, messages, or scrape profiles. LinkedIn's user agreement prohibits them and can restrict your account. Your account is your pipeline. **Protect it.**

Step 8. Move it to a meeting and into your CRM

LinkedIn starts the conversation. Your sales process finishes it.

When a prospect says yes to a conversation, they leave the pre-sales funnel and enter your real pipeline. Treat it like any other lead.

- **Book it now.** Offer two times or your booking link in the same message. Confirm the purpose of the call in one line.
- **Log it the same day.** Create the contact and deal in your CRM. Set the lead source to LinkedIn, so you can measure what LinkedIn brings in.
- **Fill in the Next Step.** In my CRM, Next Step is a required field. Who is going to do what, by when. If there's no next step, you're just hoping.
- **Stage by action.** A prospect moves to the next stage only when they do something. Same rule as the pre-sales funnel. No hope-ium.
- **Run the first call as discovery, not a demo.** Ask about their world before you show yours.
- **Keep showing up on LinkedIn.** Keep commenting on their posts while the deal is open. It keeps you top of mind without "just checking in."

Step 9. Put your sales team on LinkedIn

You're the thought leader. Your salespeople carry the conversations. That's how LinkedIn scales past you.

If LinkedIn only works when you're on it, you've built another version of founder-led sales. You want your salespeople on LinkedIn too, promoting your company through their own content and their own conversations.

What each salesperson does

- Rewrites their profile for buyers, using Step 2.
- Posts twice a week, from what they hear in the field.
- Shares company posts with their own comment on top. A bare repost does almost nothing.
- Runs the daily rhythm in Step 10 with their own targets.

What you do as the founder

- **Write it into your sales playbook.** Daily targets, the templates in this document, approved stories, and who owns a lead found on LinkedIn. If two reps find the same founder, your sales rules decide, not an argument.
- **Hold a 15-minute LinkedIn huddle each week.** Each rep brings their best comment, their best DM, and one conversation that turned into a meeting. Like reviewing gold calls, you reinforce what works.
- **Track it.** Add LinkedIn activity to each rep's KPIs. What gets measured gets done.
- **Lead by example.** Your team won't post if you don't.

Step 10. Work the daily rhythm, track it, keep going

Success doesn't happen in a single post. It's the accumulation of consistent efforts.

The 45-minute daily rhythm

Minutes	What you do
10	Sales Navigator: alerts, new leads, move people between lists
15	Comment on five to ten posts from your ICP
10	Send 15 to 20 personal connection requests
10	DMs: thank-you's, replies, value messages. Log any meetings in the CRM.

Post on your posting days and reply to comments in the first hour.

Weekly scorecard

These are activity targets to start with. After 30 days, replace them with your own baselines.

Metric	Starting target	This week
Posts published	3	
Personal connection requests sent (ICP only)	75 to 100	
Acceptance rate	Set your baseline in month 1	
Real comments on ICP posts	50	
Two-way DM conversations started	Set your baseline in month 1	
Meetings booked from LinkedIn	Set your baseline in month 1	
New connections who fit your ICP	80% or more	

Monthly review

- Which posts brought ICP comments and profile views? Do more of those.
- Which connection notes got accepted most? Use them.
- Where do people stall in the pre-sales funnel? Fix that stage.
- How many meetings and deals came from LinkedIn this month? Check the CRM lead source.

Your first 90 days

Weeks	Focus	Done when
1 to 2	ICP card, profile rewrite, Sales Navigator setup	Your profile passes the 10-second test and your lists are built
3 to 4	Start posting three times a week. Start the daily rhythm.	Ten days in a row of the 45-minute rhythm
5 to 8	Hold the rhythm. Run the DM sequence.	First conversations from LinkedIn booked
9 to 12	Review the numbers. Bring your salespeople in (Step 9).	Your team runs the rhythm without you

Keep going

For five months I got nothing. Then in one week I signed two clients. The work wasn't going unnoticed. It was building in the background.

Your buyers are watching, even when they're silent. Keep showing up.

> **STUCK ON A STEP?**
> Book an hour with me. Bring the one problem that keeps you up at night and leave with a plan. **LouieBernstein.com/advice**

QUICK REFERENCE

What not to do on LinkedIn

Most of these feel like shortcuts. They cost you trust.

- Pitching in the connection note or the first DM.
- Chasing follower counts instead of ICP connections.
- “Great post!” comments.
- Posting and disappearing. Stay for the first hour.
- “Just checking in” follow-ups.
- Bots and automation tools.
- Hashtag stuffing and emoji walls.
- Quitting after 30 days because nobody called.
- Leaving LinkedIn conversations out of the CRM.

NEXT STEP

Get my advice

Reading the playbook is the easy part. Working it is where founders get stuck.

You don’t have to figure this out alone. I spent 22 years in founder-led sales before I built a team that could sell without me. I know where this gets hard.

Book a one-hour advice session. Bring the one problem that keeps you up at night: starting, selling, hiring, cash, growth. I ask the hard questions and we find what’s underneath.

Before the hour ends, we build your plan:

- What to do first.
- What to do next.
- What to stop doing.

It’s an easy way to see how I can help, without a big commitment.

GET SALES ADVICE

Real answers. Clear next steps.

LouieBernstein.com/advice

ABOUT THE AUTHOR

About Louie Bernstein

Fractional Sales Leader for founder-led sales teams.

I've spent about five decades in sales and sales management. My first business job was IT recruiting in 1976. From there I moved into technology sales.

In 1986 I founded MindIQ. I bootstrapped it for 22 years and it made the Inc. 500. For much of that time I was the founder closing the deals, until I wrote down my process and built a team that could run it.

Today I work as a Fractional Sales Leader. I help founders of $1M to $10M companies get out of founder-led sales. I build the sales process, the playbook, the pipeline, the CRM, and the hiring system, so a founder can step back and sales keeps growing.

I post on LinkedIn every day and publish ***The Sunday Starter***, a weekly LinkedIn newsletter. I'm a LinkedIn Top Voice.

Connect with me on LinkedIn: linkedin.com/in/sales-processes

Book an advice session: LouieBernstein.com/advice