



LinkedIn

# Sales Navigator Q1 '20 Release

Product Updates and New Features



# About this document

*This document for LinkedIn Sales Navigator is intended to provide guidance on the future direction of the product, and thereby enable you -- our valued customers and partners -- to plan training, manage user adoption, identify interdependencies with technologies or processes already deployed alongside LinkedIn Sales Navigator.*

*The following is an outline of LinkedIn's general product direction and possible future developments which may be changed by LinkedIn at any time, for any reason, without notice. It is intended for information purposes only and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for LinkedIn's products remains at the sole discretion of LinkedIn. LinkedIn makes no warranties, express or implied, in this document. The information in this document is confidential and proprietary to LinkedIn and may not be disclosed without the permission of LinkedIn.*

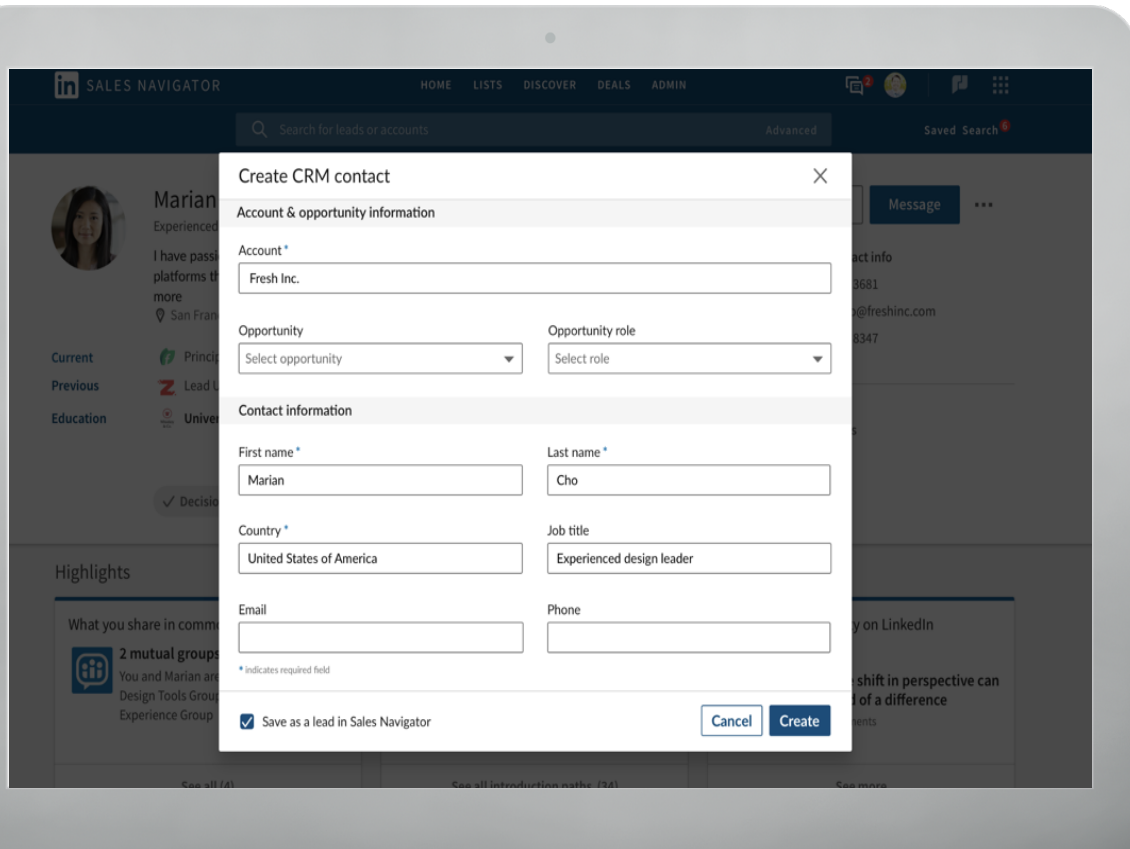
# Contact Creation

Enterprise SKU Only, CRM Sync for Salesforce Required



# What's new?

## Contact Creation in CRM from Sales Navigator



The screenshot displays the Salesforce Sales Navigator interface with a 'Create CRM contact' modal form open. The form is divided into two main sections: 'Account & opportunity information' and 'Contact information'. The 'Account & opportunity information' section includes a text field for 'Account \*' (filled with 'Fresh Inc.'), a dropdown for 'Opportunity' (set to 'Select opportunity'), and a dropdown for 'Opportunity role' (set to 'Select role'). The 'Contact information' section includes text fields for 'First name \*' (filled with 'Marian'), 'Last name \*' (filled with 'Cho'), 'Country \*' (filled with 'United States of America'), 'Job title' (filled with 'Experienced design leader'), 'Email', and 'Phone'. A checkbox at the bottom left is labeled 'Save as a lead in Sales Navigator' and is checked. At the bottom right are 'Cancel' and 'Create' buttons. The background shows the Sales Navigator sidebar with a user profile for 'Marian' and a search bar at the top.

Contact Creation provides the ability for a user to create a Contact record in Salesforce CRM from a Sales Navigator Lead Page or Lead List.

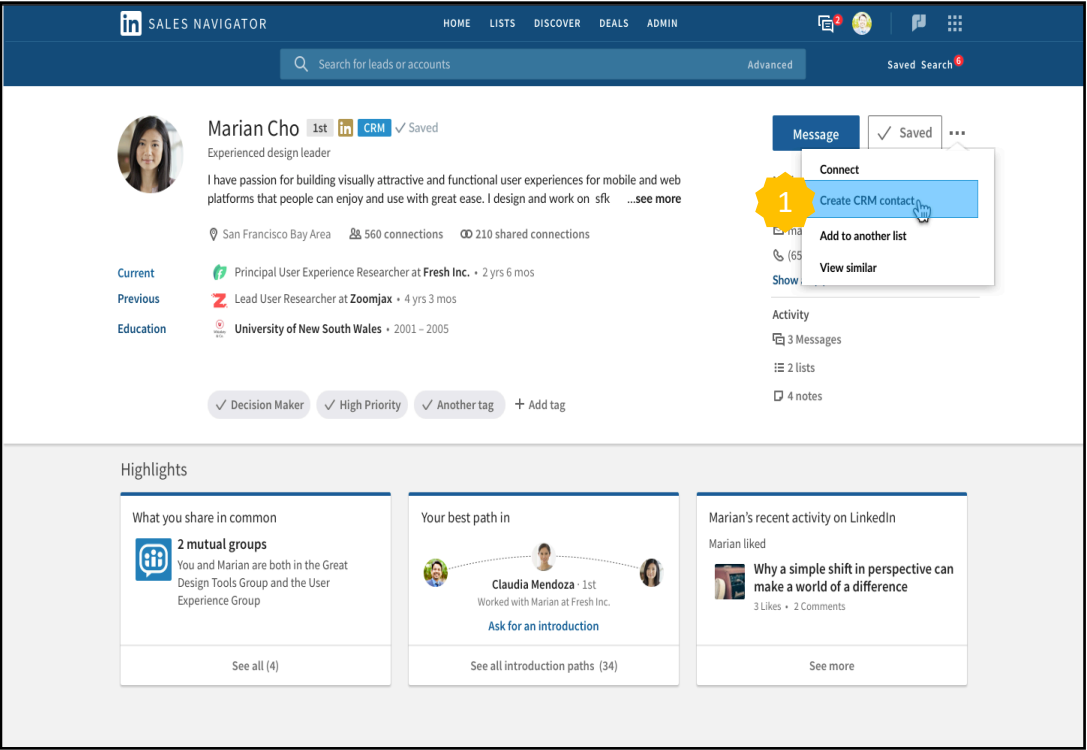
### Standard supported fields include:

- Account
- Opportunity
- Opportunity Role
- First Name (pre-populated from Sales Navigator)
- Last Name (pre-populated from Sales Navigator)
- Job Title (pre-populated from Sales Navigator)
- Country (pre-populated from Sales Navigator)
- Email
- Phone Number
- Lead Source

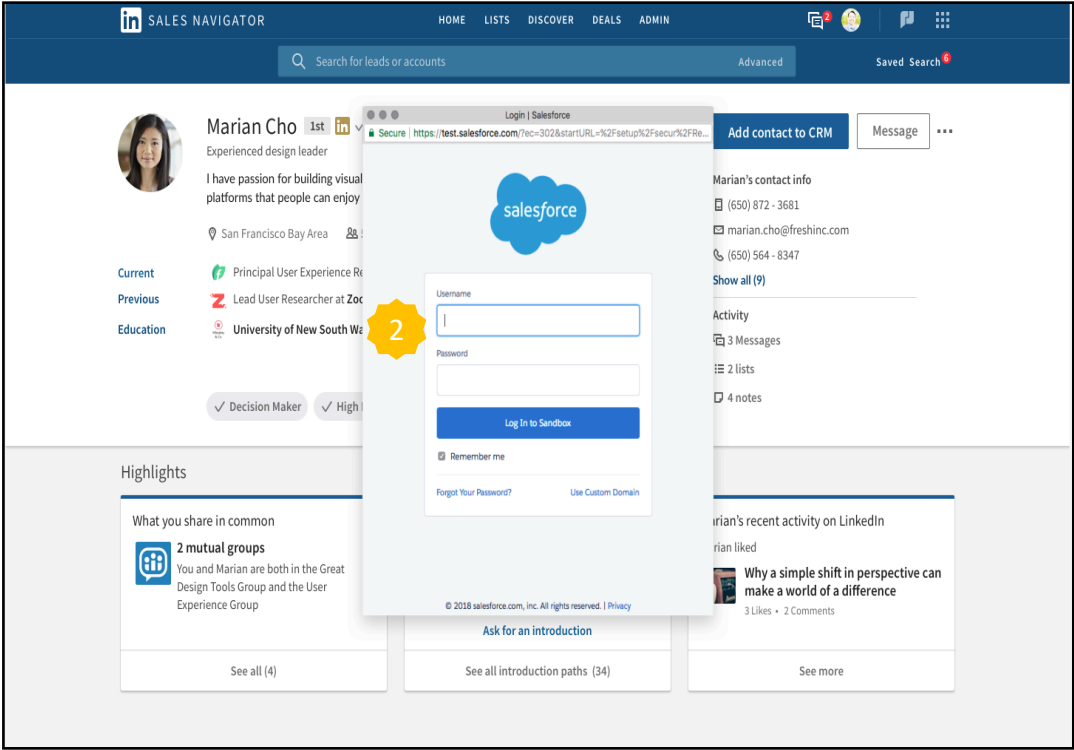


# How it works: User Instructions

With Contact Creation, productivity is maintained by granting the option to stay within your workflow and add contacts from Sales Navigator to your CRM.



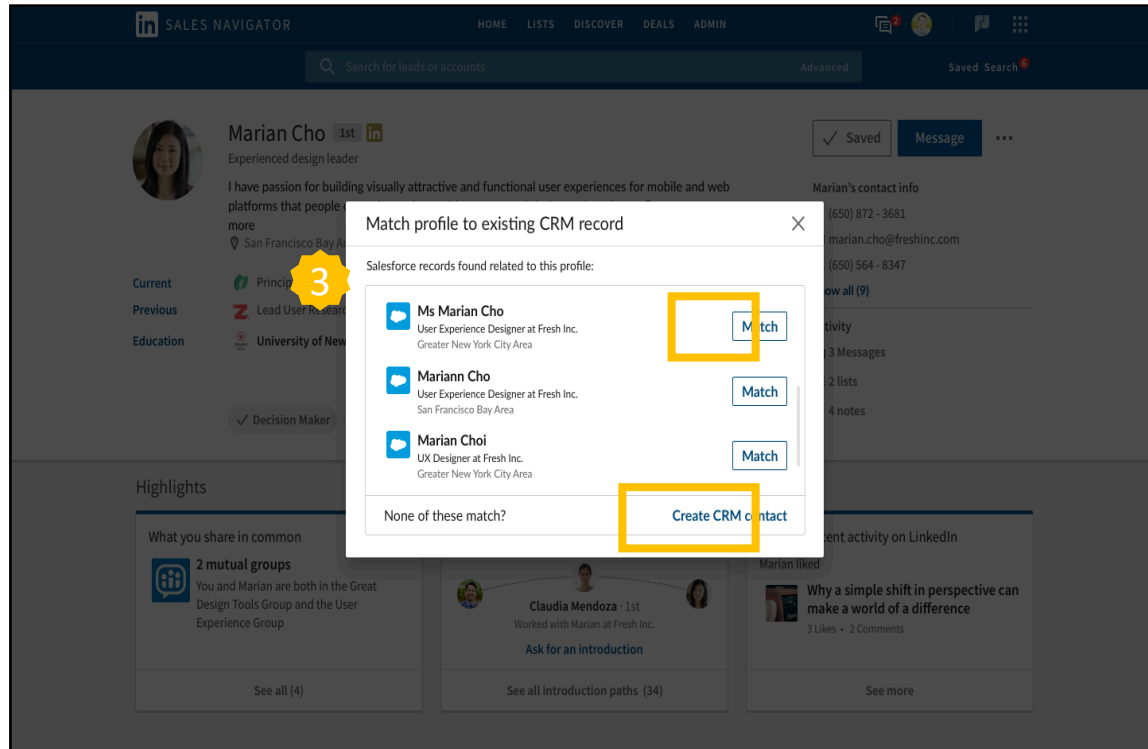
1. User clicks on “Create CRM Contact” from a Lead Page or Lead List



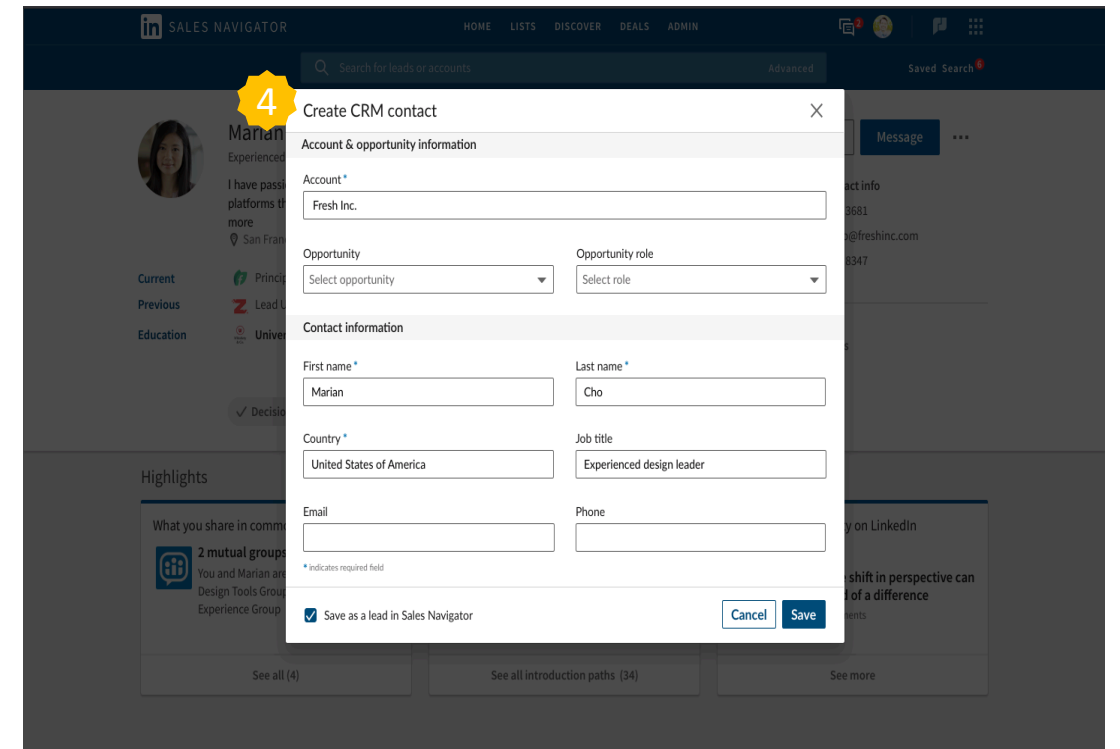
2. User must sign into CRM if not already authenticated in order to abide by CRM permissions

# How it works: User Instructions

With Contact Creation, productivity is maintained by granting the option to stay within your workflow to add contacts to your CRM.



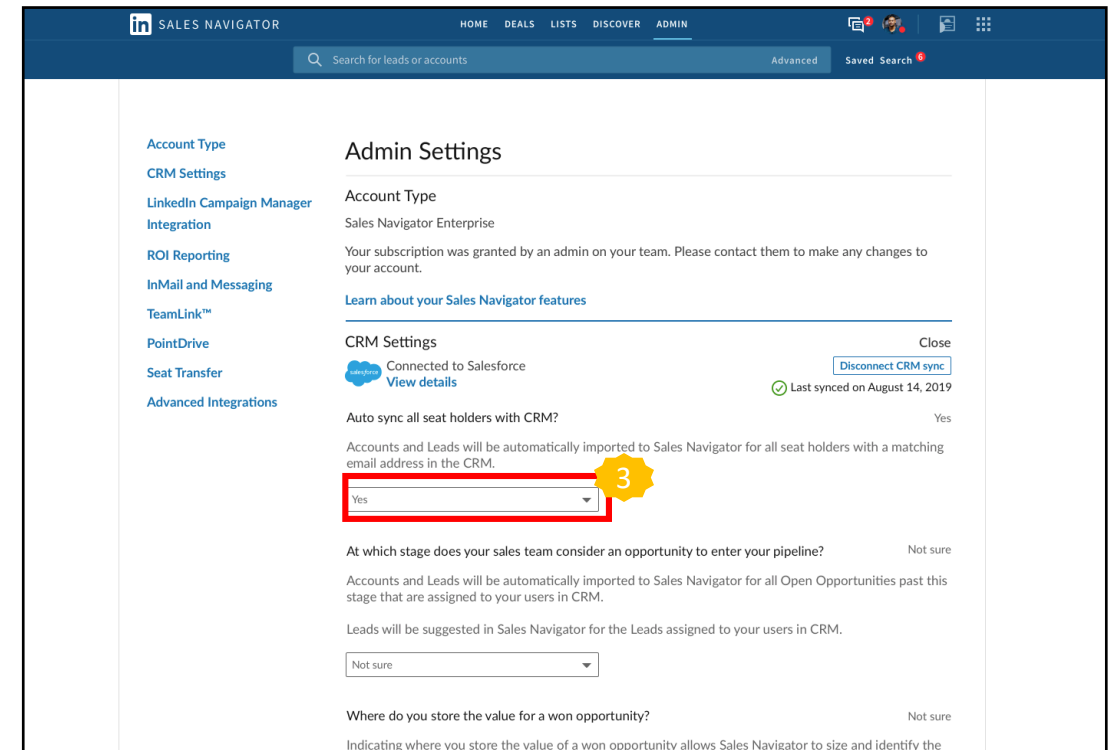
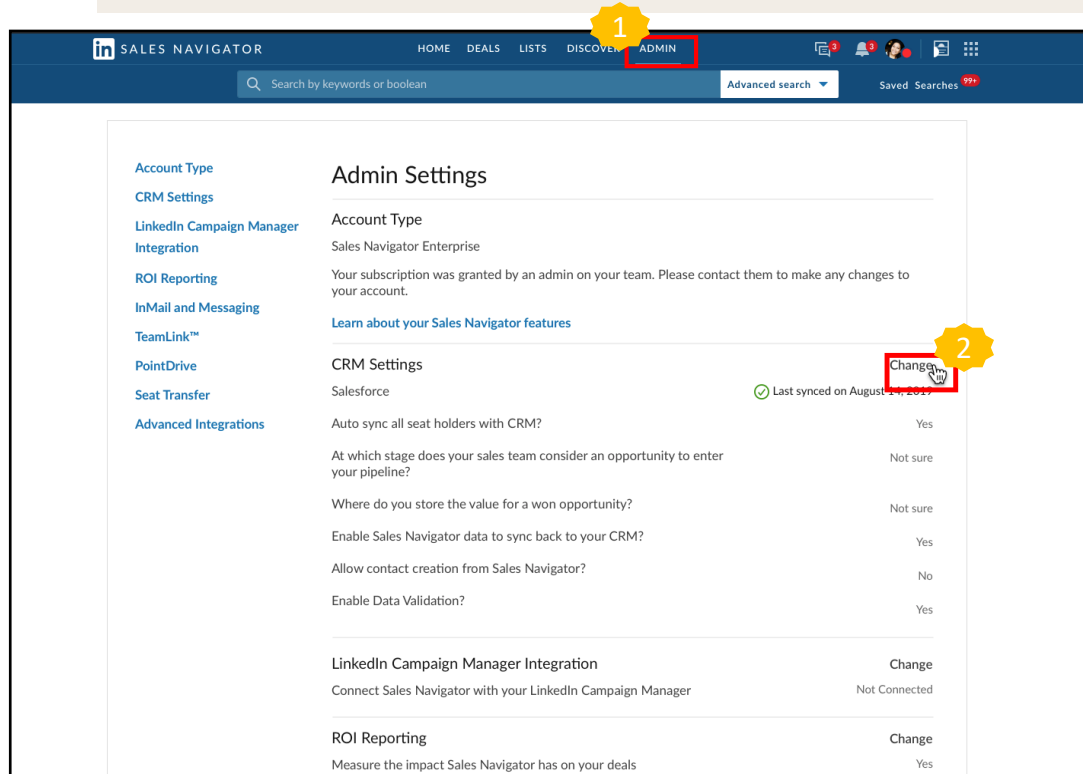
3. Sales Navigator will check if there are any existing Contact records that may match the lead profile, to avoid duplication and maintain CRM cleanliness. If there is a match, click “Match”. If not, click “Create CRM contact” to proceed



4. Users may proceed and create a new contact by filling out the relevant form fields and clicking “Save”

# How to enable Contract Creation: Admin Instructions

Sales Navigator Admins can maintain control of their organization by enabling the Contact Creation functionality for their users. Note: CRM Sync for Salesforce must be enabled



1. Click on Admin-->Admin Settings
2. Next to CRM Settings click "Change"

3. Confirm that the setting for "Auto sync all seat holders with CRM" is set to Yes



# How to enable Contract Creation: Admin Instructions

Enable Sales Navigator data to sync back to your CRM? Yes

Synced Sales Navigator data will not overwrite existing CRM data fields. Sales Navigator data items will be added as tasks to your CRM's native task UI, by date of creation.

View how synced Sales Navigator data will appear in your CRM [Test Write-Back](#)

☒ Sync back all data items (or specify specific items below)

- ☒ InMails
- ☒ Messages
- ☒ Calls
- ☒ Notes

Allow contact creation from Sales Navigator? No

Allows leads from Sales Navigator to be created into contacts in your CRM. Note: Requires "Auto sync all seat holders with CRM" to be set to "Yes", and also for your users to be signed into CRM.

☒ Yes

Select the LeadSource value that should be associated to Contacts created from Sales Navigator:

Select lead source

- LinkedIn Sales Navigator
- Online
- Menu option 3
- Menu option 4
- Menu option 5

[Change](#)

Connect Sales Navigator with your LinkedIn Campaign Manager Not Connected

4. Scroll down to the section called "Allow contact creation from Sales Navigator" and set the toggle to Yes
5. Select a Lead Source value to associate to Contacts created from Sales Navigator. This picklist represents existing values in your CRM. Setting a Lead Source value is optional but recommended.

6

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☒ Yes

Select the LeadSource value that should be associated to Contacts created from Sales Navigator:

LinkedIn Sales Navigator

☐ No

Enable Data Validation? Yes

6. Contact Creation is now enabled

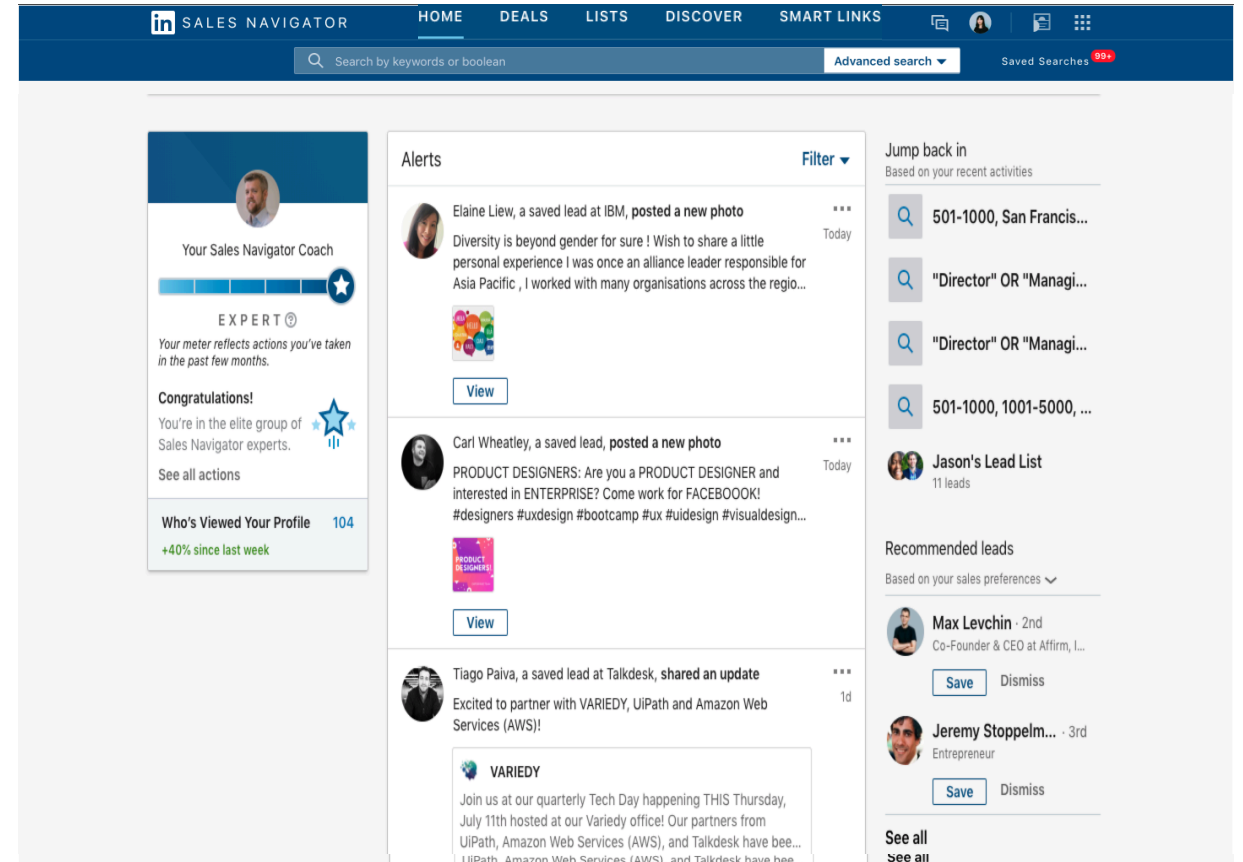
# Smart Links

Teams & Enterprise SKU

# Introducing Smart Links

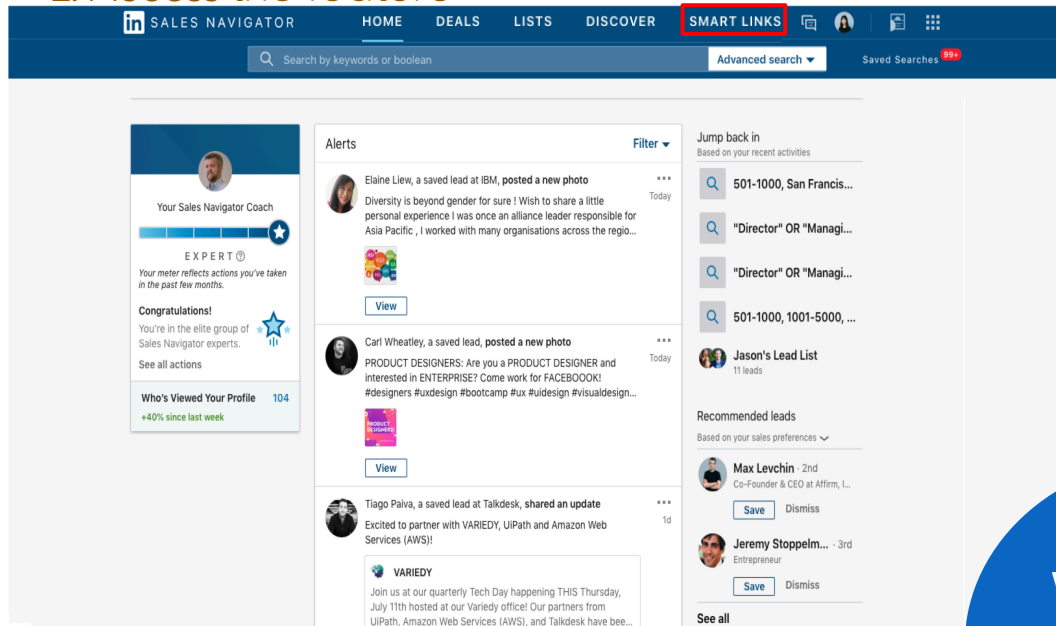
Smart Links will live front and center in Sales Navigator, allowing users to:

- **Easily package content into one link without leaving their workflow:**  
Users will be able to quickly bundle their content into one link that can be shared from Sales Navigator, InMail, or email.
- **Track how recipients are engaging with content:**  
Users will be provided with real-time insights on how recipients are engaging with content. These insights can be used to ascertain interest, personalize follow-ups, and identify other stakeholders in the buyer's circle.

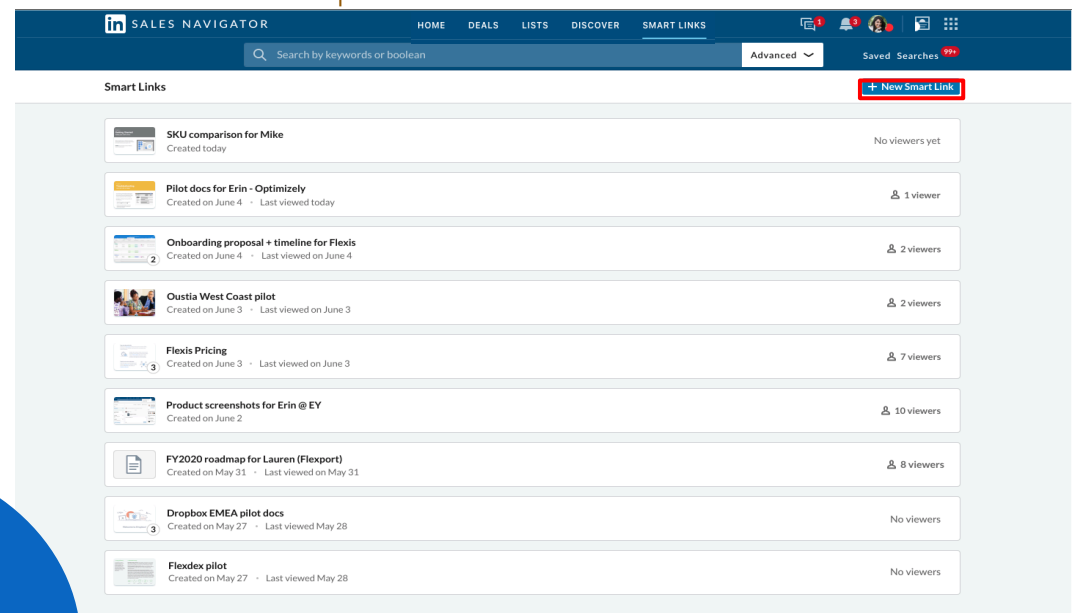




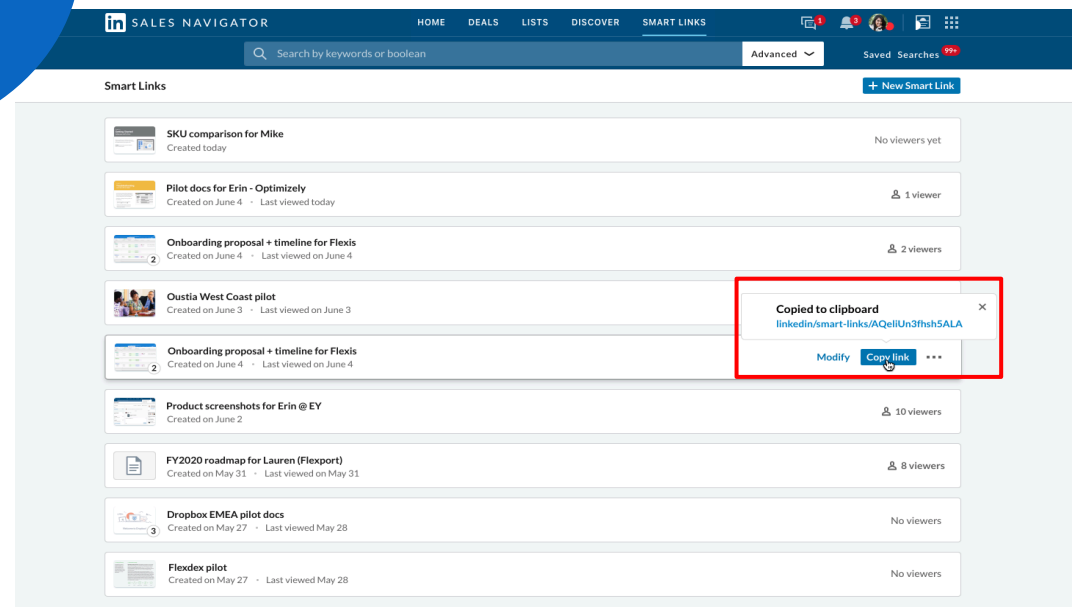
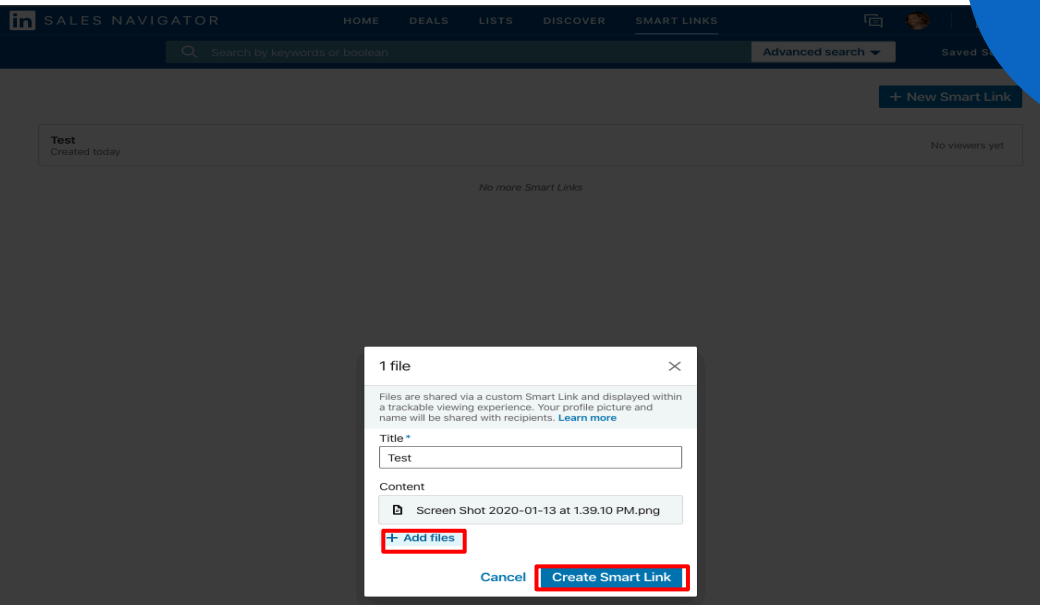
## 1. Access the feature



## 2. Create a new presentation



## Smart Links Walkthrough: Sales Navigator Workflow

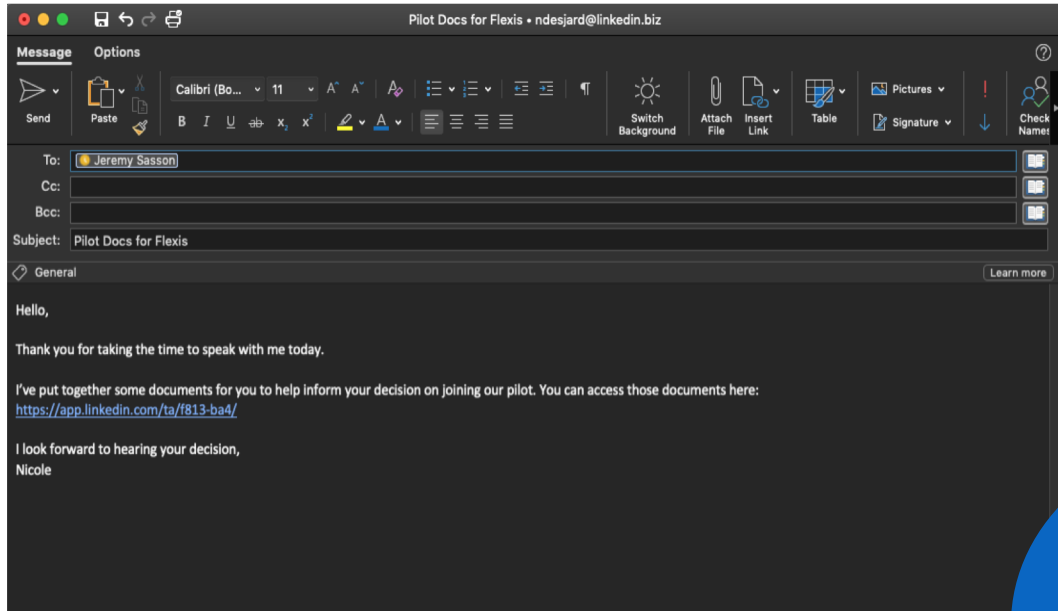


## 3. Add files

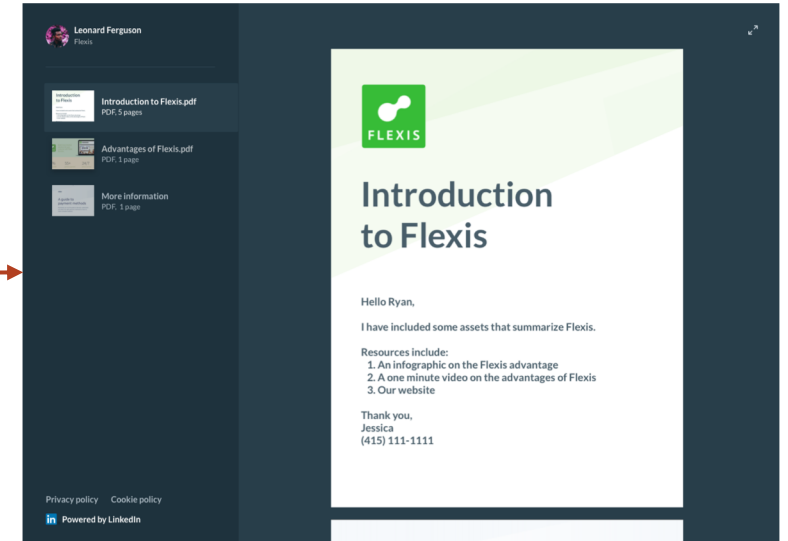
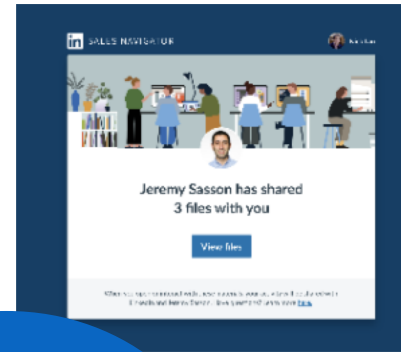
MOCKS - Subject to change

## 4. Generate your link

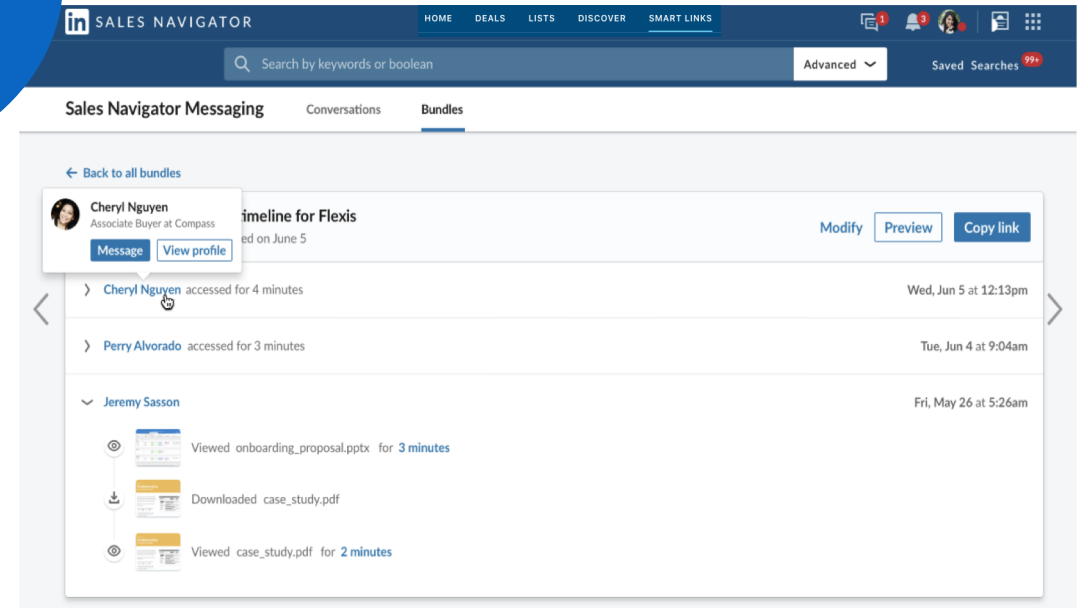
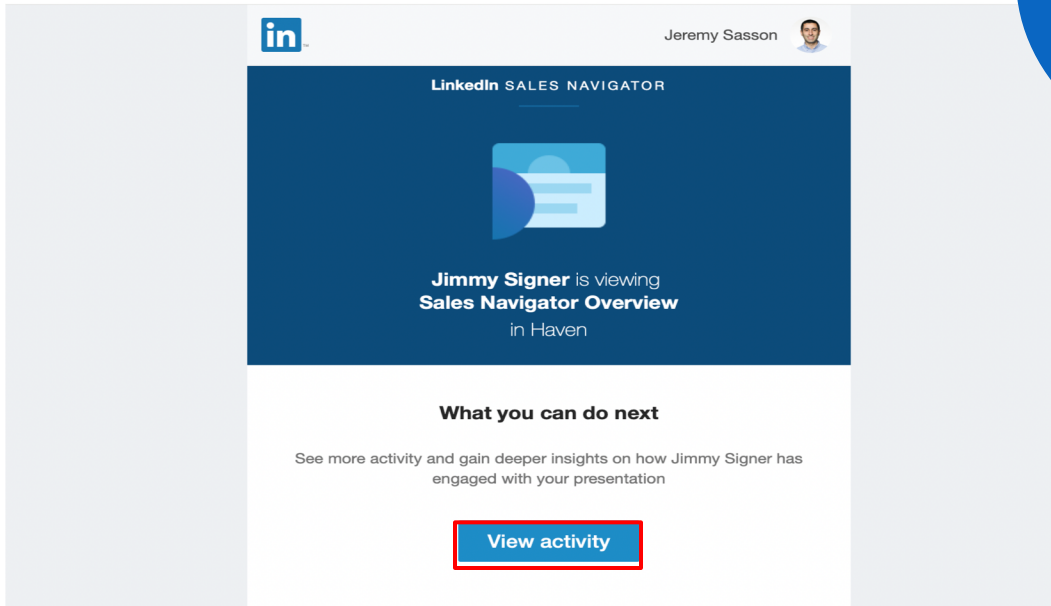
## 5. Share your link



## 6. Recipient views link



## Smart Links Walkthrough: Sales Navigator Workflow



## 7. You receive an email when link is viewed

*MOCKS - Subject to change*

## 8. Access viewer analytics

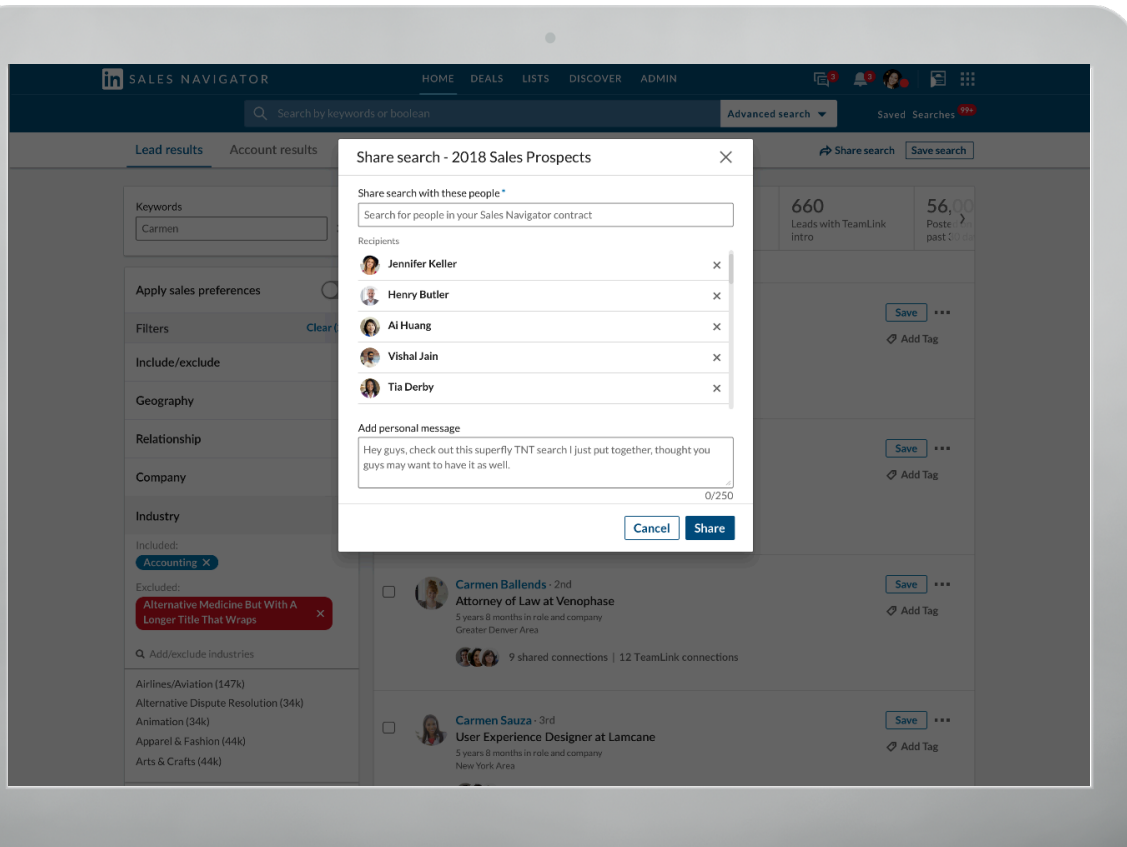
# Search Enhancements

Shared Lead Search, Saved Account Search



# What's new?

## Shared Lead Search



Collaborating with a team to find new leads? Found a great combination of filters that generated valuable search results?

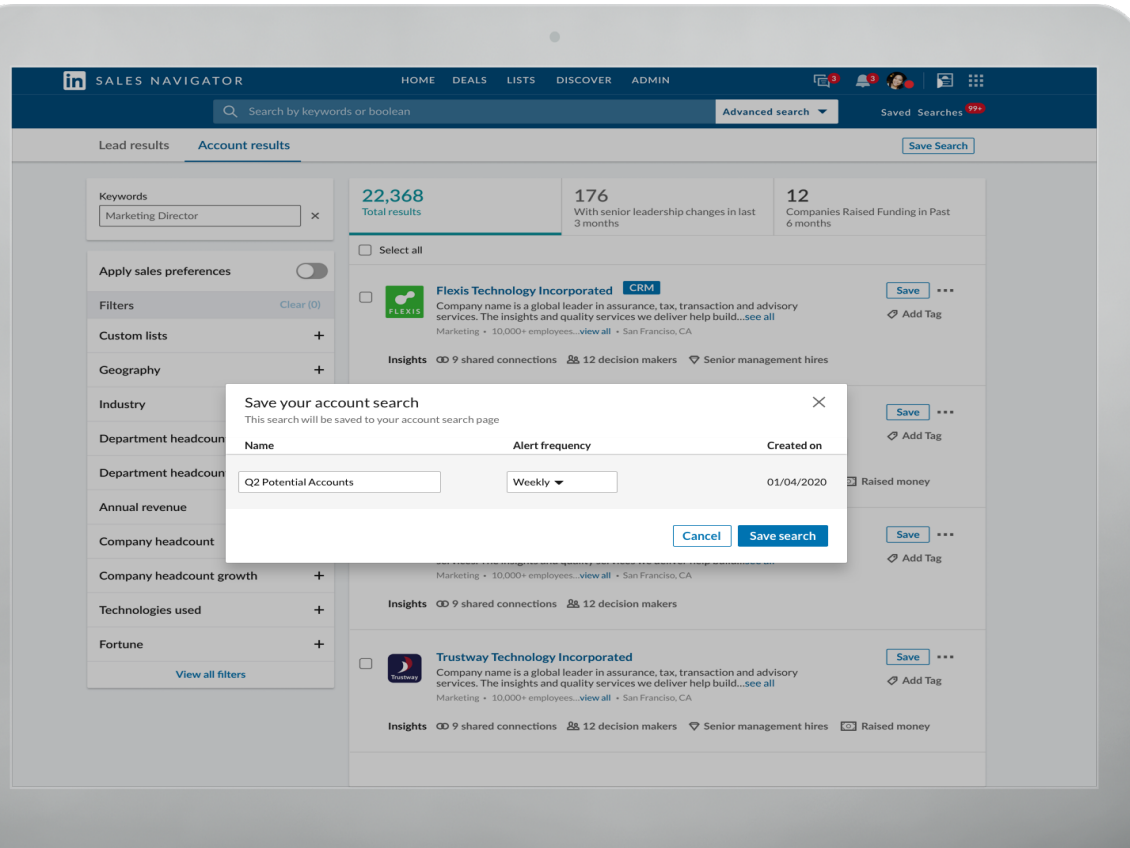
Users can now share their lead searches with colleagues on their Sales Navigator contract so everyone can tap into the value of their search.

### How it works:

- When sharing a search, the user can select one or multiple recipients and add a note.
- The recipient will receive an alert that a search has been shared with and may click to see the associated search with the filters pre-populated.

# What's new?

## Saved Account Search



Searching for accounts is incredibly valuable for the subset of Sales Navigator users who work at sales organizations with an “open territory” plan. Users who have found an account search that works for them, want the ability to save the search so they can re-visit it in the future.

Users can already save lead searches in Sales Navigator, and today we are adding the ability to save account searches.

### How it works:

- When saving an account search, a user has the ability to name the search, set an update cadence for new alerts, and view their saved account searches.
- A user will also receive an email alert with more information on the latest results of a users saved account search.

# New Alerts


Job posting growth





# What's new?

## New alerts: Account Preparing to Grow

 **Flexis** is preparing for growth, job openings have accelerated in the past 90 days. ...

Internet • 1001-5000 employees

6 hours

[View Account Insights](#)

Sales Navigator Alerts provides you with relevant and unique insights about accounts, leads, and relationships that make it easy to understand, prioritize, and act. With Alerts, you can spend less time researching and more time on selling and building relationships.

This quarter we are adding a new Alert for your saved accounts:

- **Account preparing to grow** – this Alert is generated when there is growth in the number of job postings by a saved Account, indicating preparation for growth

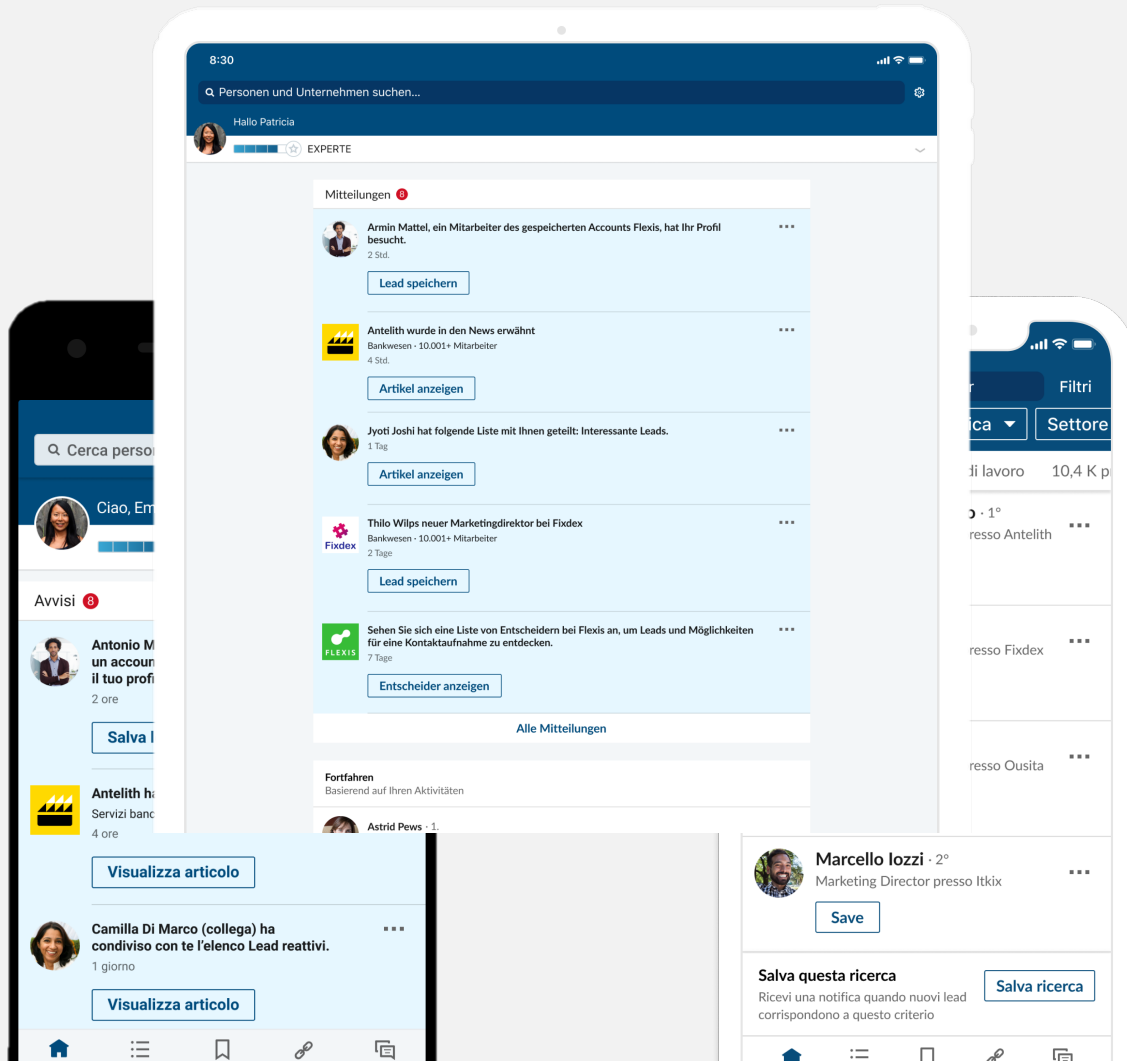
To receive these types of Alerts, please make sure you have saved Accounts. No set up is required.

# Mobile Enhancements

Expanding app to all 7 languages offered on desktop,  
filters with multi-select

# What's new?

New languages offered on mobile app!



Our mobile app is now available in all 7 languages offered on desktop:

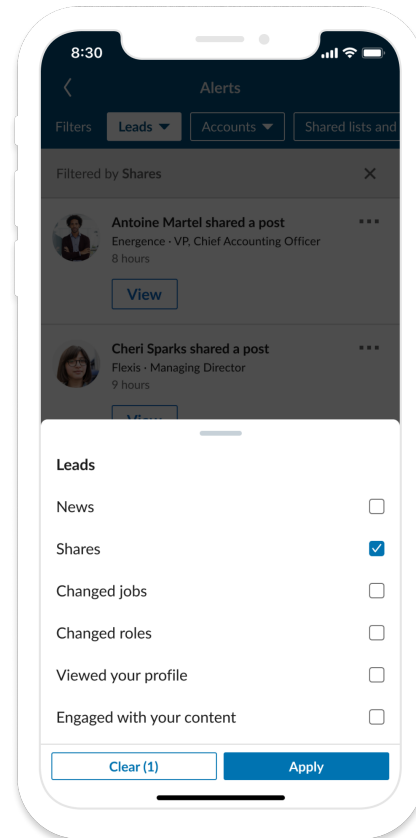
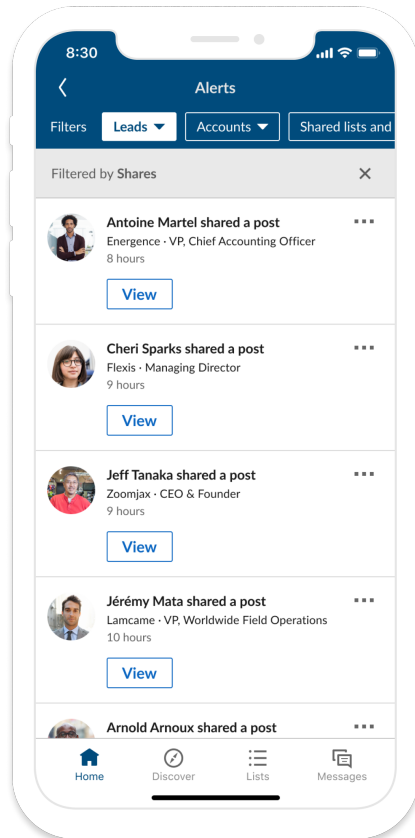
- English
- French
- German
- Italian
- Portuguese
- Dutch
- Spanish

Your app will automatically update to be in the language you have chosen in your phone system settings – no need to adjust anything!

Available for Android and iOS.

# What's new?

## Filtered Alerts



Sales Navigator Alerts provides you with relevant and unique insights about accounts, leads, and relationships that make it easy to understand, prioritize, and act. With Alerts, you can spend less time researching and more time on selling and building relationships.

Our mobile app is now introducing the ability to filter alerts on mobile and provide you the ability to select multiple customized views.

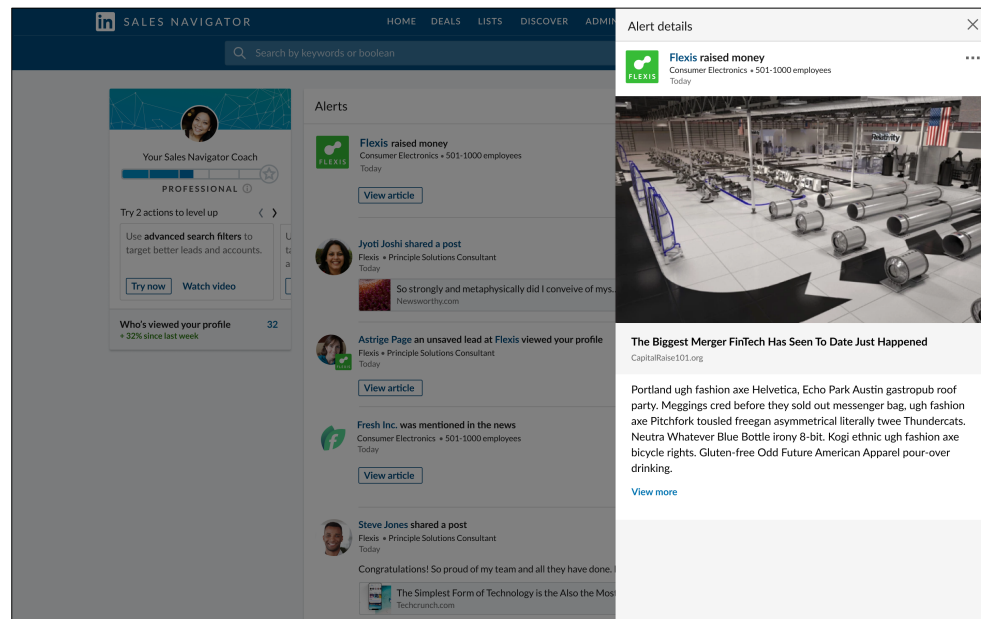
A user will now be able to filter out relevant insights about their leads, accounts, and relationships on the go!

# Homepage Enhancements

Slide-in panel enhancements

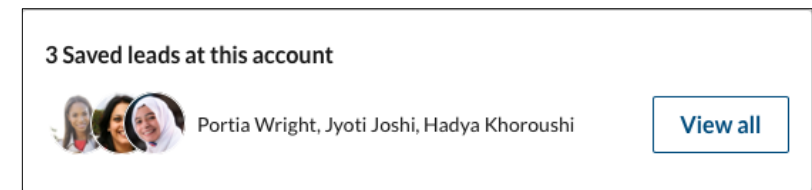
# What's new?

We are launching additional enhancements to the homepage experience aimed at improving your ease of use and maximizing efficiency.



## Account Funding News Slide-in panel:

All Account Funding News Alerts will now open into a panel that slides out from the right side of the homepage, allowing you to view the article without leaving Sales Navigator.



## CTA on Panel:

The CTAs on a slide-in panel, will allow a user to take action from directly within the panel. They will be able to send an InMail to saved leads with just two-clicks!



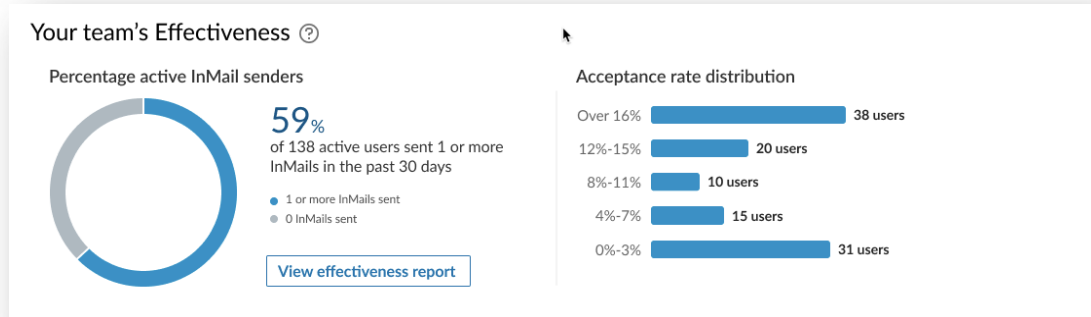
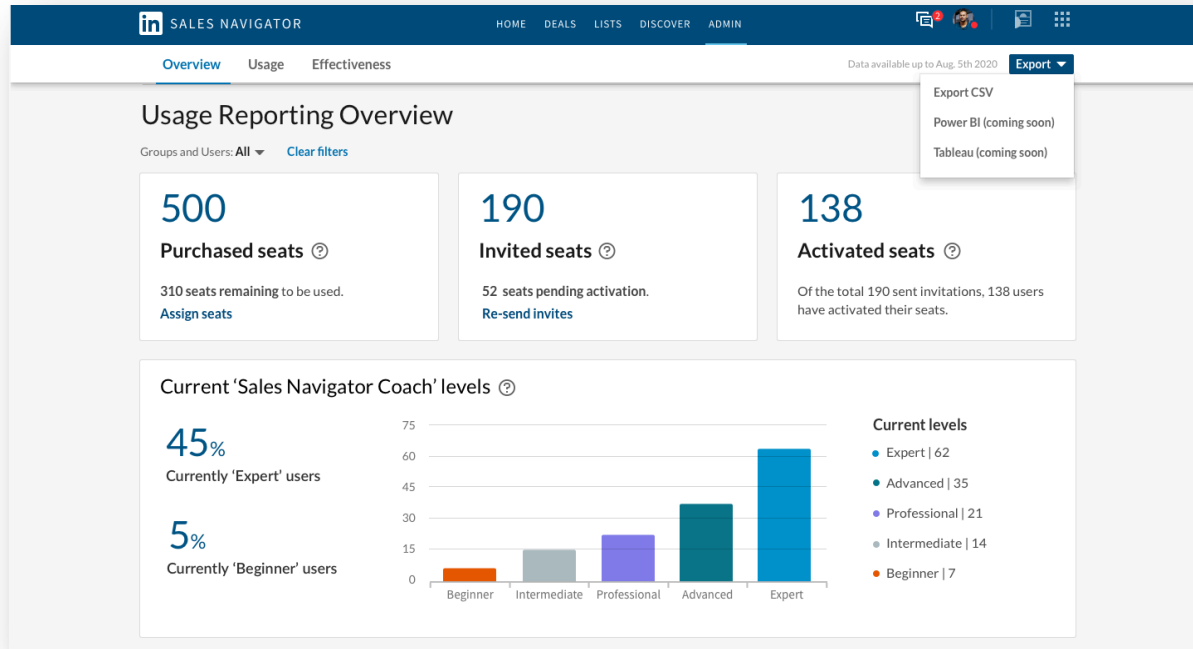


# Usage Reporting Refresh + Enhancements

Refresh ramp for Team accounts and Overview tab improvements

# What's new?

## Usage Reporting Refresh new features



The new Usage Reporting experience is launching to Team SKU accounts in Q1. Team + Enterprise (ramped Q4) accounts are also getting 2 improvements.

### Key additions:

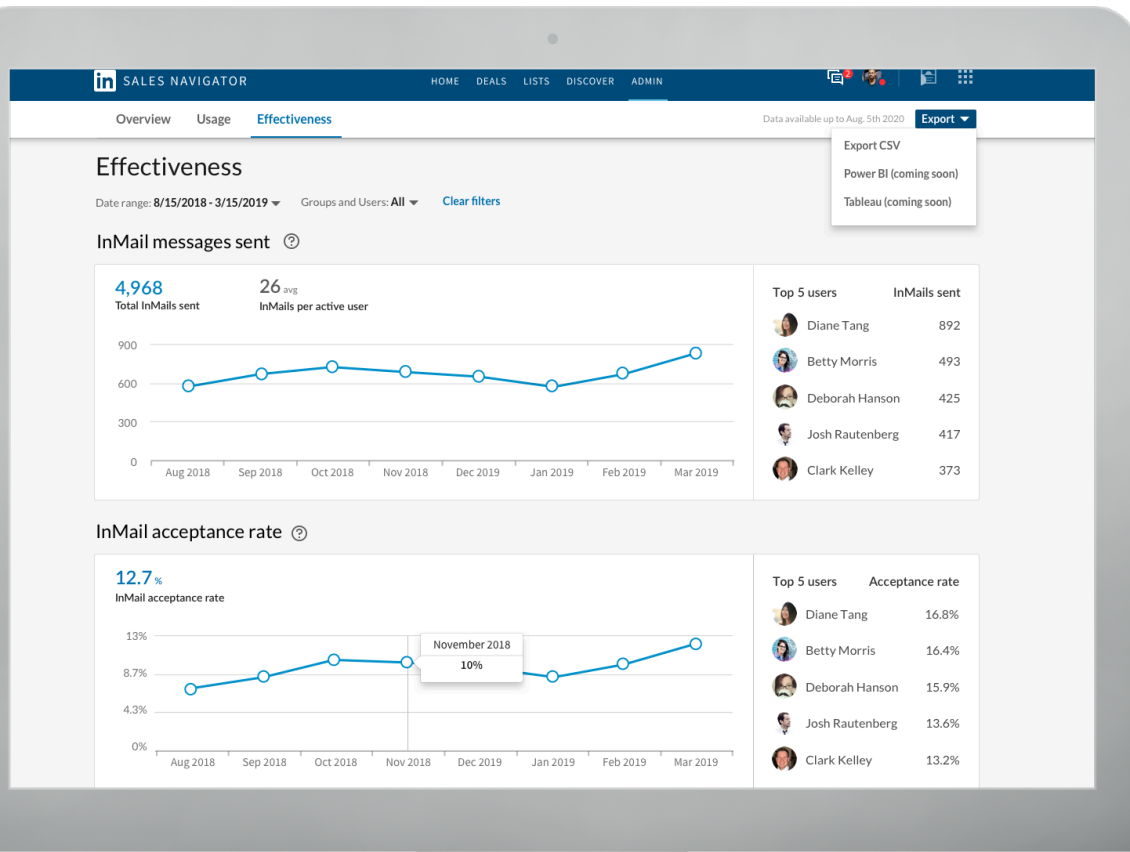
- 3-tab navigation:
  - **Overview:** Seat, Coach Level distribution, and *Usage and Effectiveness overview charts (\*NEW\*)*
  - **Usage:** Basic activity analytics
  - **Effectiveness:** Selling-based activity analytics
- New metrics:
  - **In Reporting:** InMail Acceptance Rate
  - **In CSV export:** Coach Level + InMail Acceptance Rate
  - **LinkedIn.com tracking opt-out:** Users can opt-out of LinkedIn.com tracking for blended metrics (\*NEW\*)
- Chart filters:
  - Custom date range
  - Filter by group + filter by user
- CSV export:
  - Access to the above filters
  - Filter out inactive accounts
  - New columns: Employee ID, Coach Level, InMail Acceptance Rate
  - New column headers to match Account Center
  - Access to Analytics Integration partners (Tableau + Power BI)
- SSI:
  - Removed from UI
  - Still in CSV

# What's New?

## Usage Reporting Refresh GTM and value

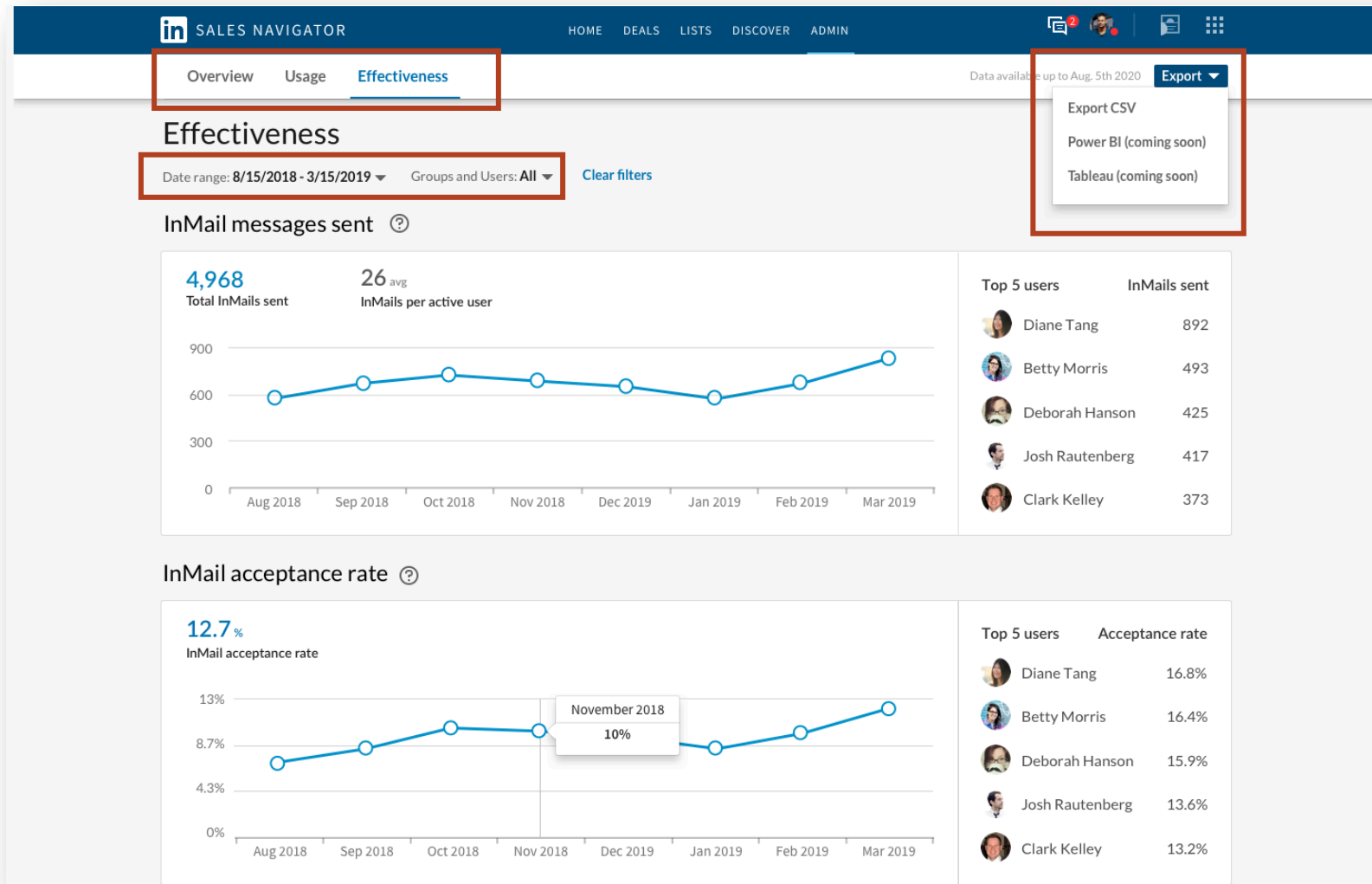
Who will gain access: Team SKU gains access to Refresh + Enhancements and ENT SKU gains enhancements. No additional actions required to turn on

- Increase rep effectiveness
  - New actionable insights to drive best practices within your team and improve rep effectiveness
- Improve admin experience
  - Updated look and feel of Usage Reporting to give admins a more flexible experience that fits their company's individual needs



# What's new?

Usage Reporting Refresh navigation, filters, and CSV export options

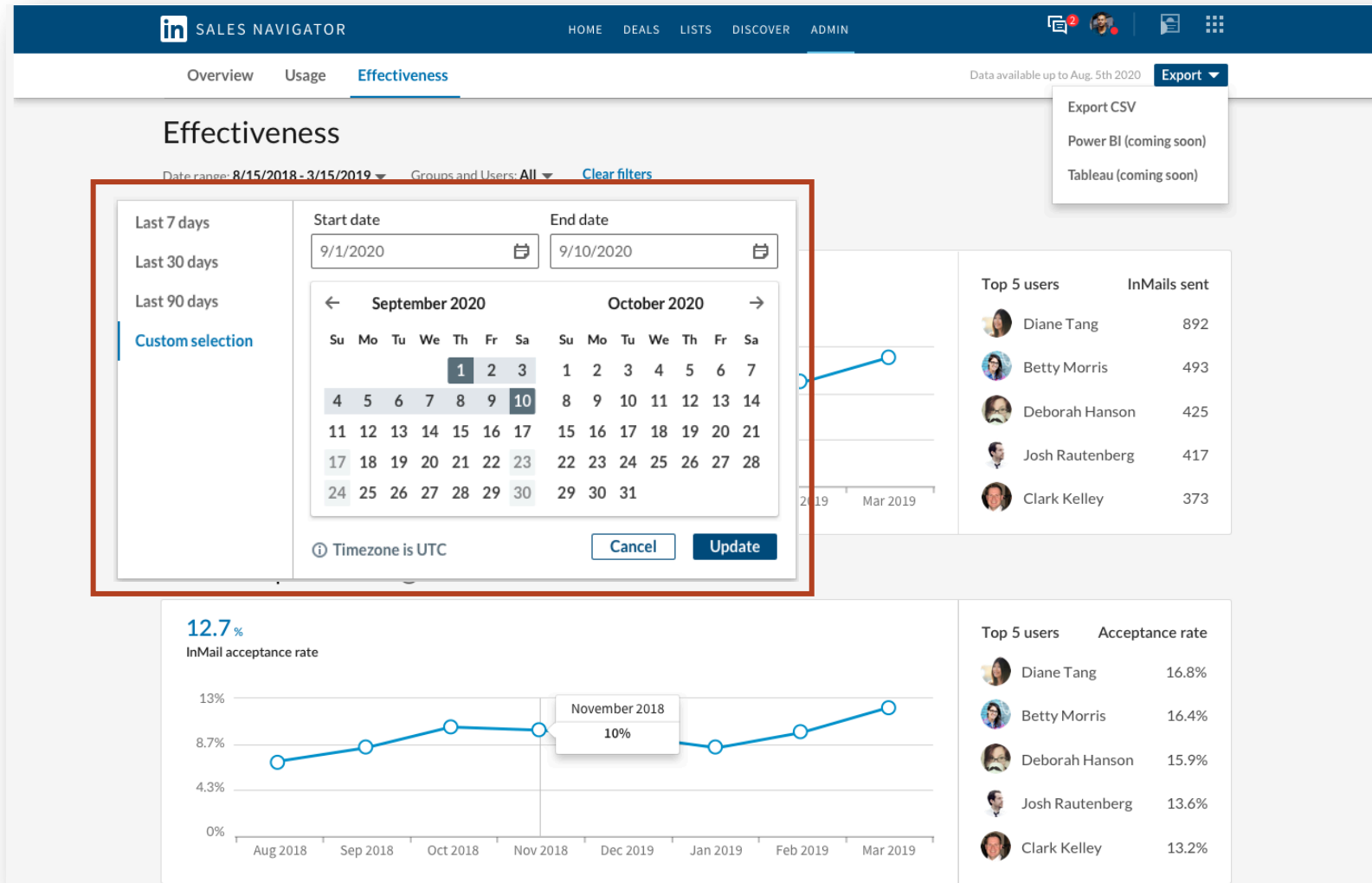


Improved organization and increased flexibility:

- New navigation
- New filters:
  - Custom date range
  - Group and Users
- New CSV export options:
  - Access above filters
  - Access new Analytics Integrations

# What's new?

## Usage Reporting Refresh custom date ranges



### Improved date range customization:

- New custom + set date range capabilities

# What's new?

Usage Reporting Refresh new filters detail

Search by group, user name or email

Groups >

Users >

SELECTED

*Click groups or users above to select a filter*



Search by group, user name or email

All > Groups

Select a group below to filter

- ☐ Eastern Operations (10) >
- ☐ Western Operations (18) >
- ☐ Northern Operations (13) >
- ☐ Southern Operations (8) >
- ☐ Regional Operations (14) >
- ☐ Global Technical Cus... (10) >
- ☐ Global Sales Lead (18) >

OR

Search by group, user name or email

Groups >

Users >

SELECTED [Deselect all](#)

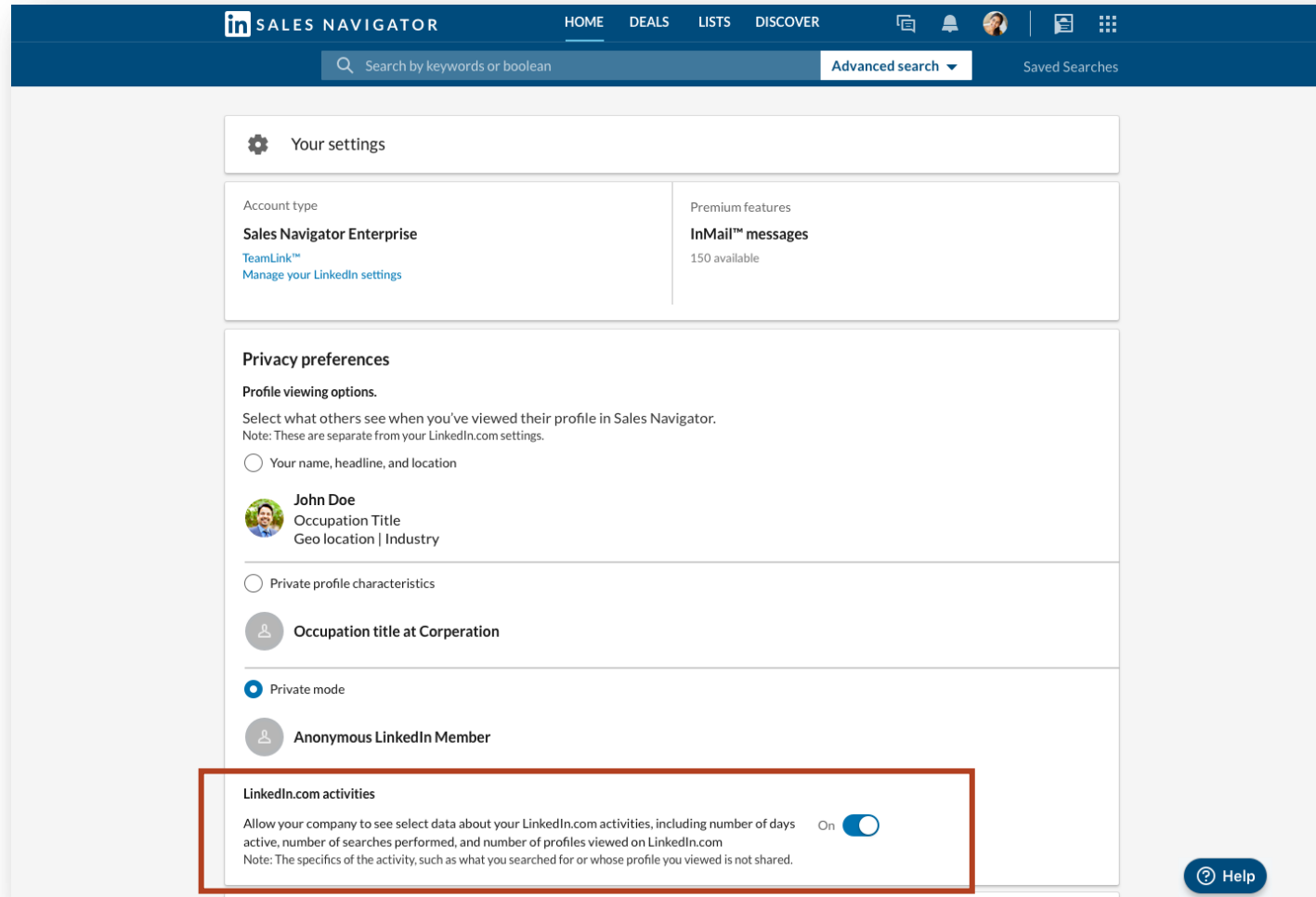
- Northern Operations (13) x
- Puja Chaudhary x

Improved chart flexibility: Filter down to specific groups (added in Account center) or specific individuals



# What's new?

## User opt-out for LinkedIn.com activity tracking

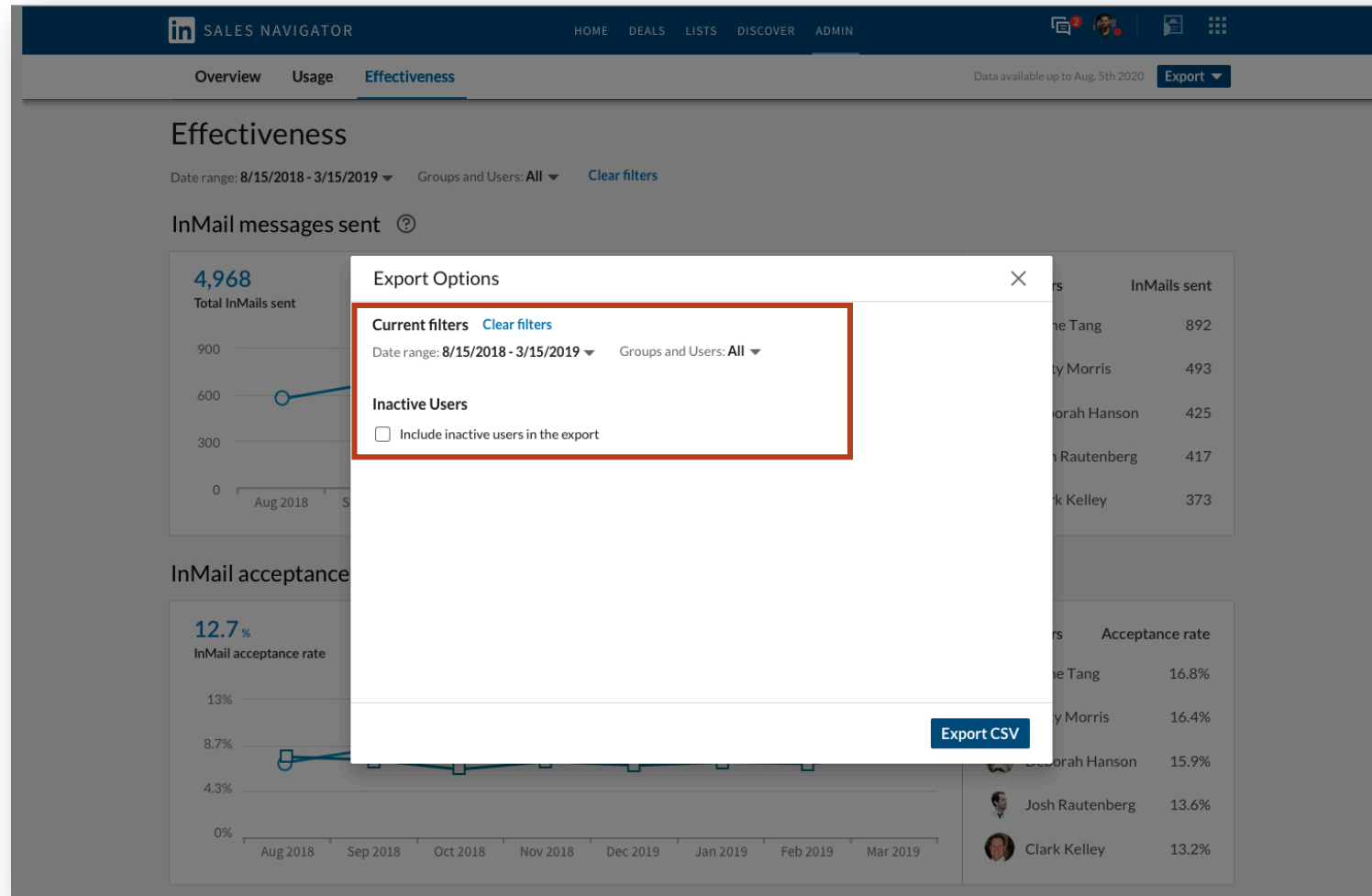


### User level opt-out for LinkedIn.com activity tracking:

- Users can now choose to opt-out of LinkedIn.com activity tracking in their personal Sales Navigator settings
- Opting out of this tracking removes their LinkedIn.com activities from blended metrics in Usage Reporting
- This opt-out gives users increased control over the privacy of their LinkedIn.com activities
- The metrics impacted are Days active, Searches Performed, Profile Views

# What's new?

## Usage Reporting Refresh CSV export detail



### Increased control over CSV export:

- Custom date filters
- Ability to filter by group and user
- Ability to exclude or include inactive users

### New actionable details + insights in CSV export download:

- Employee ID
- Coach level
- InMail Acceptance Rate
- SSI still in CSV but no longer in UI

# SNAP Integration - InsightSquared

Another Business Intelligence partner that's offering  
Analytics Integration

# What's new?



Integrating with InsightSquared to offer another Analytics Integration; specifically for marketing and sales teams and leader



## New SNAP Partner: InsightSquared

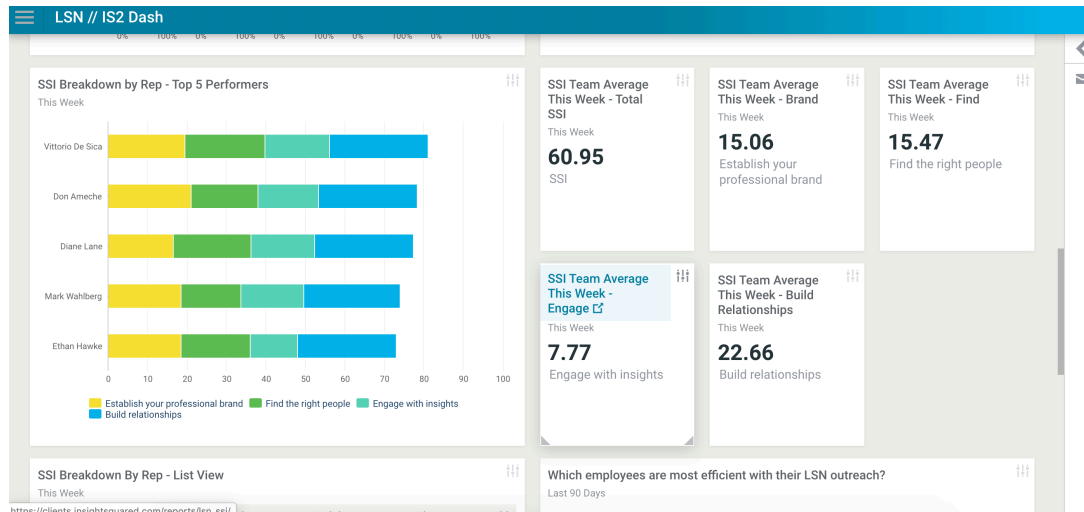
### What is it?

- Seamlessly access LinkedIn Sales Navigator usage data on InsightSquared and enable sales and marketing professionals to make better decisions by equipping them with actionable, real-time intelligence on sales and marketing KPIs.
- Offers 7 workbook templates right out of the box
- Specifically for marketing and sales teams
- Completely customizable

# What's new?



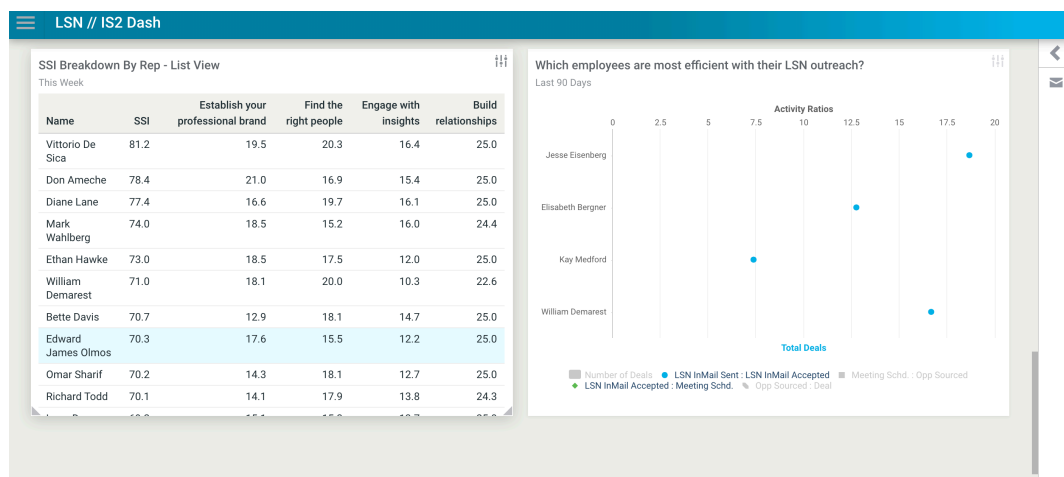
Integrating with InsightSquared to offer another Analytics Integration, specifically for marketing and sales teams and leaders



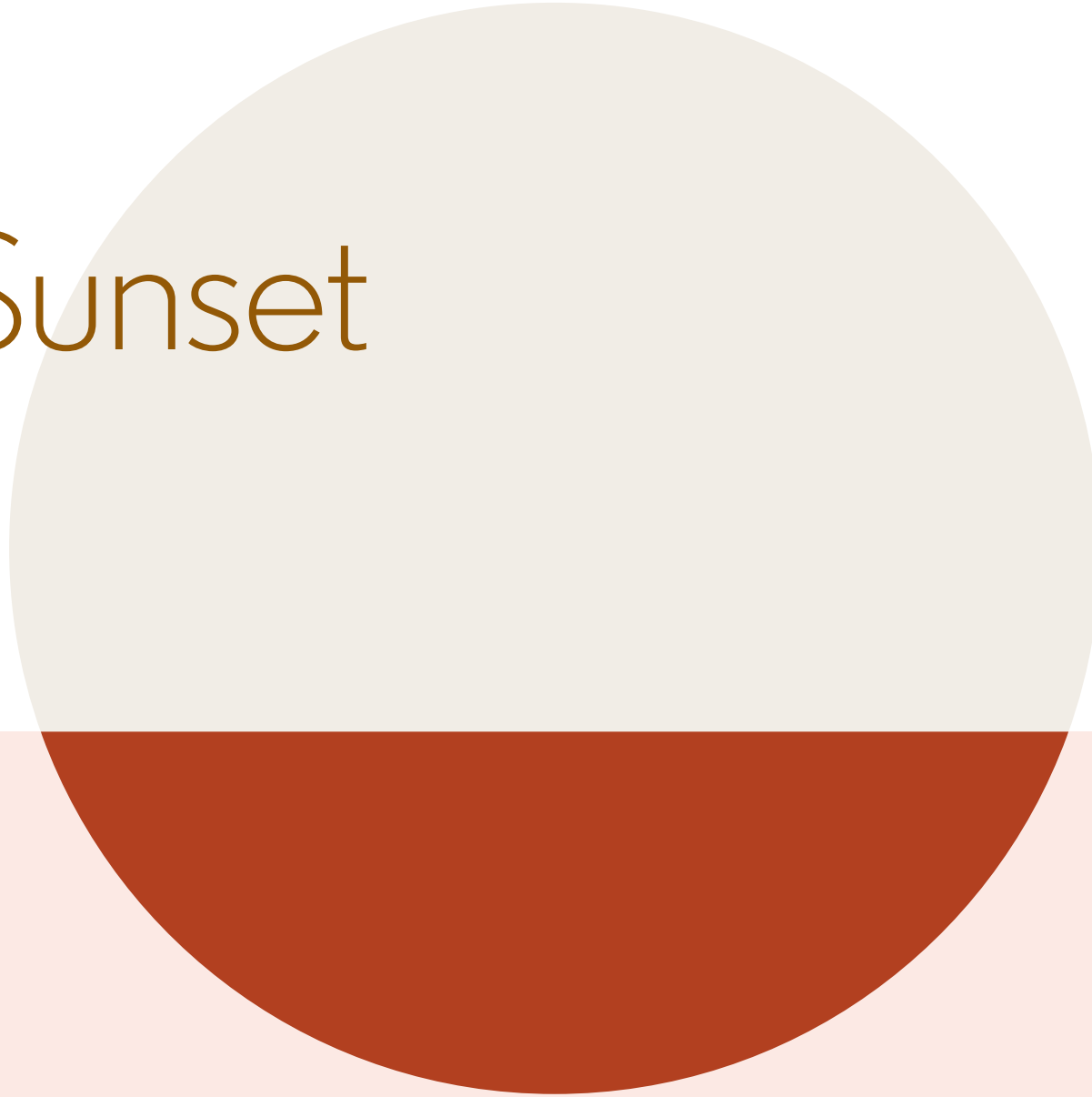
## New SNAP Partner: InsightSquared

Templates help answer questions like:

- Who is using Sales Navigator?
- How many InMails do I need to generate in order to generate a meeting, opp, or deal?
- How are my reps performing against goals?
- Which reps are my top performers?
- Who are my top performers in SSI?
- What's the SSI breakdown for each pillar?
- Which reps are most efficient with InMail outreach?



SN4G Sunset



# What's new?

We're sunseting Sales Navigator for Gmail

