



**LinkedIn**

# Sales Navigator Q4 '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 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.*

# Feature Availability Overview

Feature	Professional Users	Team Users	Enterprise Users
.CSV Uploads to Account Lists			✓ *Support for Team users coming next quarter
CRM Opportunities in Account Lists			✓ *must have CRM Sync enabled **SFDC users only (Dynamics support coming soon)
Manual Account Prioritization	✓	✓	✓
LinkedIn Outreach Activity in Account Lists	✓	✓	✓
Homepage Enhancements & New Alerts	✓	✓	✓
Smart Links Enhancements		✓	✓
New User Onboarding Flow	✓	✓	✓

# Feature Availability Overview

Feature	Professional Users	Team Users	Enterprise Users
[ADMINS] ROI Reporting Updates		✓ *must have CRM Sync enabled	✓ *must have CRM Sync enabled
Filter Alerts Feed by Account or Lead	✓	✓	✓
Company Headquarters filter	✓	✓	✓
Account CRM filter		✓ *must have CRM Sync enabled	✓ *must have CRM Sync enabled
Buyer Interest Alerts Panel for Mobile			✓
Alerts Filter and Search for Mobile	✓	✓	✓
[ADMINS] "No Group" filter option in the Groups filter (found in the User List)		✓	✓



# New Features to Cultivate Relationships

# Meet Jack

He's an account manager at SmileDesk, a customer service software company





Jack navigates to the Account List Hub to upload a CSV of his book of business to create an Account List

SALES NAVIGATOR Home Lists Saved Searches Smart Links Messaging Admin

Search for leads and accounts All filters

Lead lists **Account lists** Deals My saved accounts (902) + Create account list

All ▾

Name	Accounts	Owner	Last updated
Strategic Accounts for APAC <b>CSV</b>	903	Daisy Hunter	10/8/2020 Daisy Hunter
Strategic Accounts for NAMER <b>CSV</b>	902	Daisy Hunter	10/8/2020 Daisy Hunter

Upload accounts from CSV  
Manually add accounts

Start by **adding your book of business** into Sales Navigator

View CRM opportunity information in your Account List

Quickly prioritize and 'star' your top accounts to focus on what matters

Determine your next best action by viewing your latest LinkedIn outreach activity







Jack checks his accounts' CRM opportunity information to get a full view of upcoming opportunities and their stage in the sales cycle

The screenshot displays the LinkedIn Sales Navigator interface. At the top, the navigation bar includes 'SALES NAVIGATOR', 'Home', 'Lists', 'Saved searches', 'Smart Links', and 'Messaging'. Below this is a search bar labeled 'Search for leads and accounts'. The main section is titled 'Account lists > Jack's 2020 Assigned Accounts' with a sub-note 'Last updated June 1, 2020'. A summary bar shows '4 Total results' and a filter 'With senior leadership changes in past 3 months'. Below this is a table with columns: 'Name', 'Saved leads', 'Last outreach', and 'Notes'. The first row shows 'Iktix CRM' with 3 saved leads and no activity. A right-hand panel titled 'CRM Opportunities at Iktix' lists three opportunities: 'Big Buck Opportunity' (Owner: Me, Stage: Negotiation, Closes on 10/03/2020), 'Upsell opportunity' (Owner: Daisy Hunter, Stage: Qualification, Closes on 06/03/2021), and 'Test accounts opportunity' (Owner: Jyoti Joshi, Closes on 03/31/2023).

Start by adding your  
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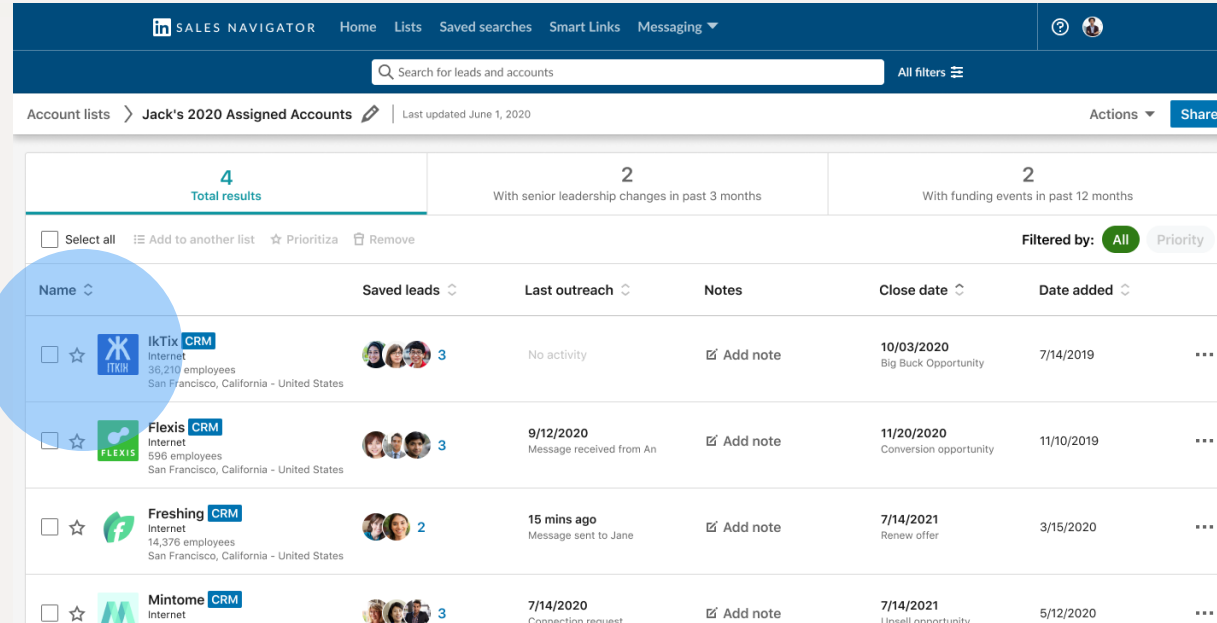
Determine your next  
best action by viewing  
your latest LinkedIn  
outreach activity







Jack then decides which of his accounts are a priority and 'stars' them



SALES NAVIGATOR Home Lists Saved searches Smart Links Messaging

Search for leads and accounts All filters













Account lists > Jack's 2020 Assigned Accounts Last updated June 1, 2020 Actions Share

4 Total results

2 With senior leadership changes in past 3 months

2 With funding events in past 12 months

Select all Add to another list Prioritize Remove Filtered by: All Priority

Name	Saved leads	Last outreach	Notes	Close date	Date added	
<input type="checkbox"/> <input checked="" type="star"/>  <b>Itix CRM</b> Internet 36,219 employees San Francisco, California - United States	 3	No activity	 Add note	10/03/2020 Big Buck Opportunity	7/14/2019	...
<input type="checkbox"/> <input checked="" type="star"/>  <b>Flexis CRM</b> Internet 596 employees San Francisco, California - United States	 3	9/12/2020 Message received from An	 Add note	11/20/2020 Conversion opportunity	11/10/2019	...
<input type="checkbox"/> <input checked="" type="star"/>  <b>Freshing CRM</b> Internet 14,376 employees San Francisco, California - United States	 2	15 mins ago Message sent to Jane	 Add note	7/14/2021 Renew offer	3/15/2020	...
<input type="checkbox"/> <input checked="" type="star"/>  <b>Mintome CRM</b> Internet	 3	7/14/2020 Connection request	 Add note	7/14/2021 Upsell opportunity	5/12/2020	...

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Quickly prioritize and  
'star' your top  
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Determine your next  
best action by viewing  
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Jack reviews his and his team's past LinkedIn outreach with his prioritized accounts before determining his next best action

SALES NAVIGATOR Home Lists Saved searches Smart Links Messaging

Search for leads and accounts

Account lists > Jack's 2020 Assigned Accounts Last updated June 1, 2020

Select all Add to another list Remove

Name	Saved leads	Last outreach	Notes
<input type="checkbox"/> <b>iKtix CRM</b> Internet 501-1000 employees San Francisco, California - United States		No activity	Add note
<input type="checkbox"/> <b>Freshing CRM</b> Internet 501-1000 employees San Francisco, California - United States		15 mins ago Sent message	Add note

Outreach activity at Freshing

- Jane Smith 4 hours ago  
Clicked a [Smart Link](#) ✓
- Karen Gouse 6/27  
Sent a [message](#) to you
- Karen Gouse 6/26  
→ Viewed Smart Link [Announcement Q2](#)
- You 6/26  
→ Sent a [message](#) to Karen Gouse
- Karen Gouse 6/22  
→ Accept your connection request
- You 6/26  
→ Sent a [connection request](#) to Karen Gouse

View less

Start by adding your  
book of business into  
Sales Navigator



Our latest Sales Navigator features to help cultivate stronger relationships and focus on what matters most.

Start by **adding your book of business** into Sales Navigator



Upload CSV file  
of Accounts

**View CRM opportunity information** in your Account List



View CRM  
Opportunities

Quickly **prioritize and 'star' your top accounts** to focus on what matters



Manually prioritize  
Accounts

Determine your next best action by **viewing the latest LinkedIn outreach activity**



View LinkedIn  
Outreach  
Activities



Community Idea



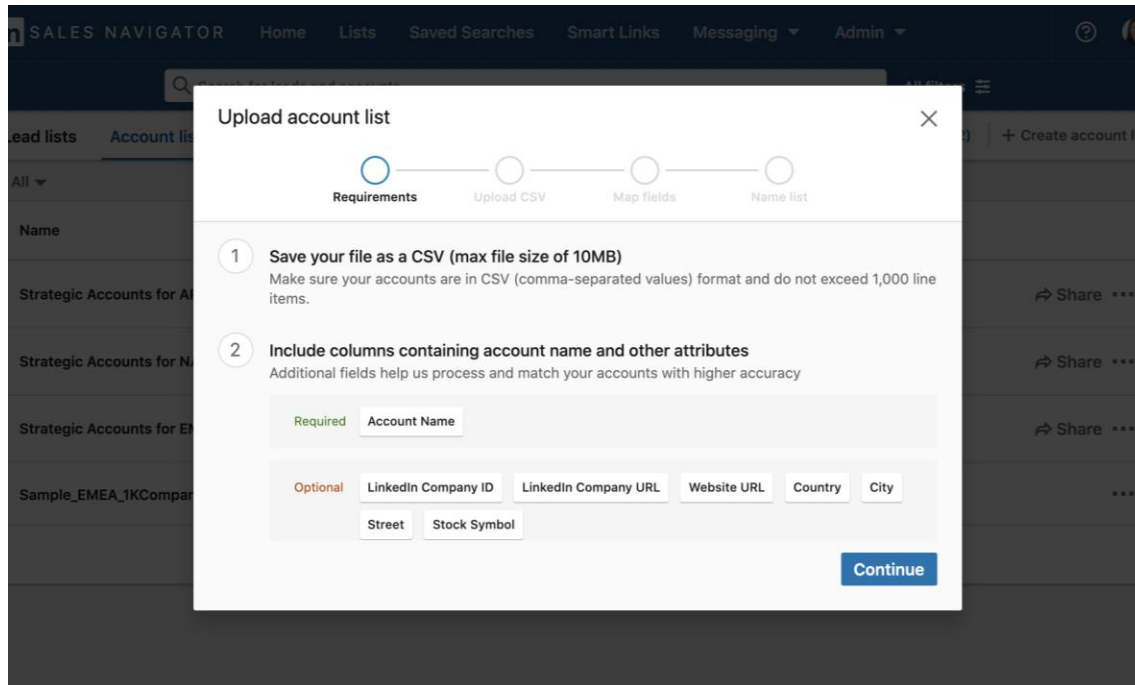
Upload CSV file  
of Accounts

## Details: .CSV Uploads in Account Lists

Available to Enterprise users (Teams support coming soon)

# .CSV Uploads to Account Lists

Available to Enterprise users (Teams support coming soon)



The screenshot shows the 'Upload account list' dialog box in the Sales Navigator interface. The dialog has a progress bar at the top with four steps: Requirements, Upload CSV, Map fields, and Name list. The 'Requirements' step is currently active. Below the progress bar, there are two numbered instructions:

- 1 Save your file as a CSV (max file size of 10MB)**  
Make sure your accounts are in CSV (comma-separated values) format and do not exceed 1,000 line items.
- 2 Include columns containing account name and other attributes**  
Additional fields help us process and match your accounts with higher accuracy

Below the instructions, there are two sections of input fields:

- Required:** A single input field labeled 'Account Name'.
- Optional:** A row of six input fields: 'LinkedIn Company ID', 'LinkedIn Company URL', 'Website URL', 'Country', 'City', 'Street', and 'Stock Symbol'.

A blue 'Continue' button is located at the bottom right of the dialog.

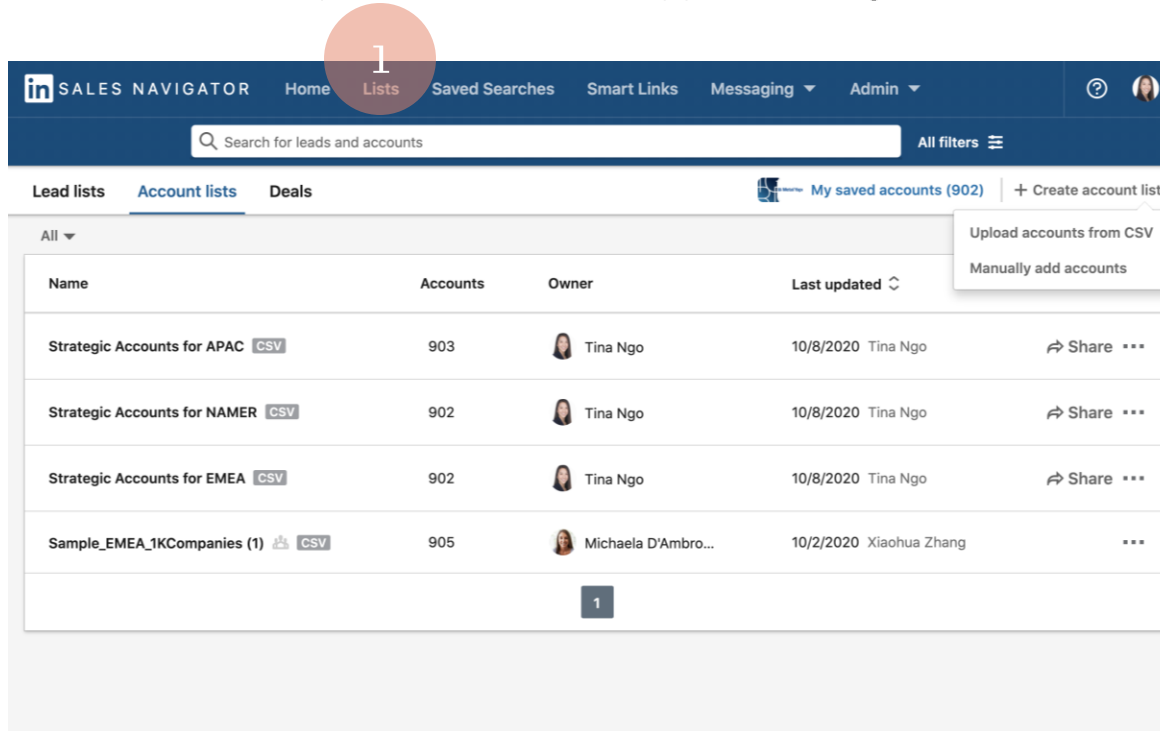
Reduce manual effort and save time by uploading a book of business

Users will be able to upload a CSV file of accounts to create an Account List.

Having their book of business in Sales Navigator allows users to manage and prioritize their accounts, use the Account List as a filter in Lead search, get timely Alerts on key changes, track their leads, and much more.

# How It Works: .CSV Uploads to Account Lists

Available to Enterprise users (Teams support coming soon)



1

SALES NAVIGATOR Home Lists Saved Searches Smart Links Messaging Admin

Search for leads and accounts All filters

Lead lists Account lists Deals

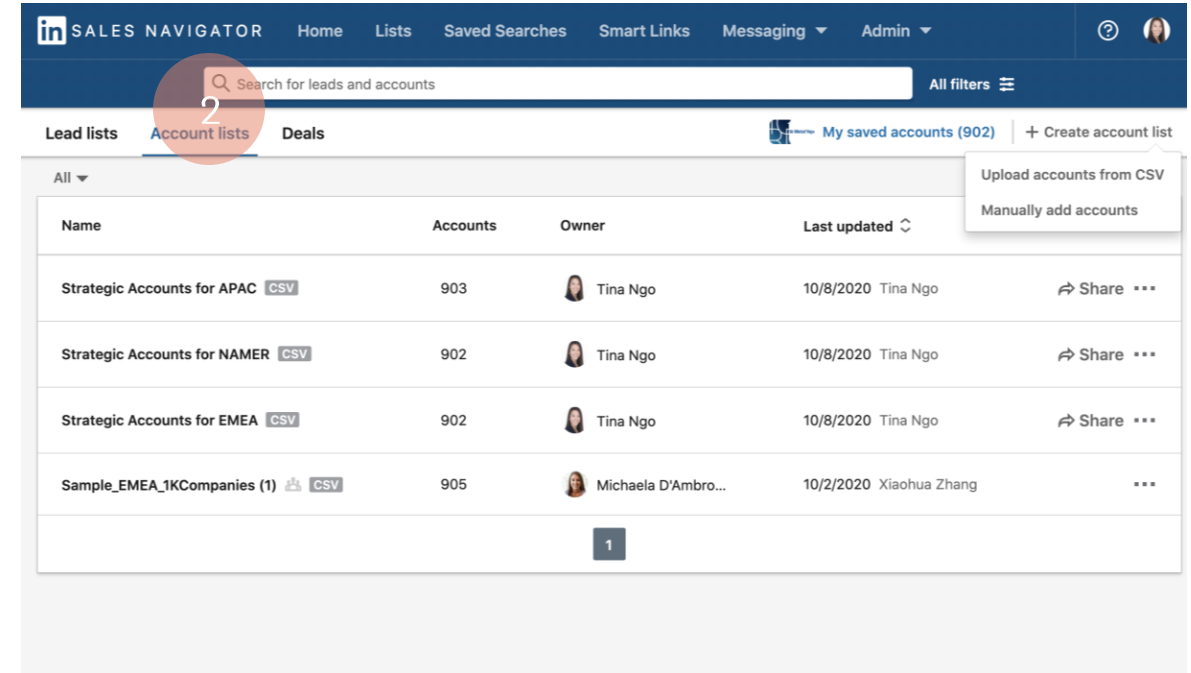
My saved accounts (902) + Create account list

Name	Accounts	Owner	Last updated
Strategic Accounts for APAC CSV	903	Tina Ngo	10/8/2020 Tina Ngo
Strategic Accounts for NAMER CSV	902	Tina Ngo	10/8/2020 Tina Ngo
Strategic Accounts for EMEA CSV	902	Tina Ngo	10/8/2020 Tina Ngo
Sample_EMEA_1KCompanies (1) CSV	905	Michaela D'Ambro...	10/2/2020 Xiaohua Zhang

Upload accounts from CSV  
Manually add accounts

## STEP 1

In Sales Navigator, select “Lists”



2

SALES NAVIGATOR Home Lists Saved Searches Smart Links Messaging Admin

Search for leads and accounts All filters

Lead lists Account lists Deals

My saved accounts (902) + Create account list

Name	Accounts	Owner	Last updated
Strategic Accounts for APAC CSV	903	Tina Ngo	10/8/2020 Tina Ngo
Strategic Accounts for NAMER CSV	902	Tina Ngo	10/8/2020 Tina Ngo
Strategic Accounts for EMEA CSV	902	Tina Ngo	10/8/2020 Tina Ngo
Sample_EMEA_1KCompanies (1) CSV	905	Michaela D'Ambro...	10/2/2020 Xiaohua Zhang

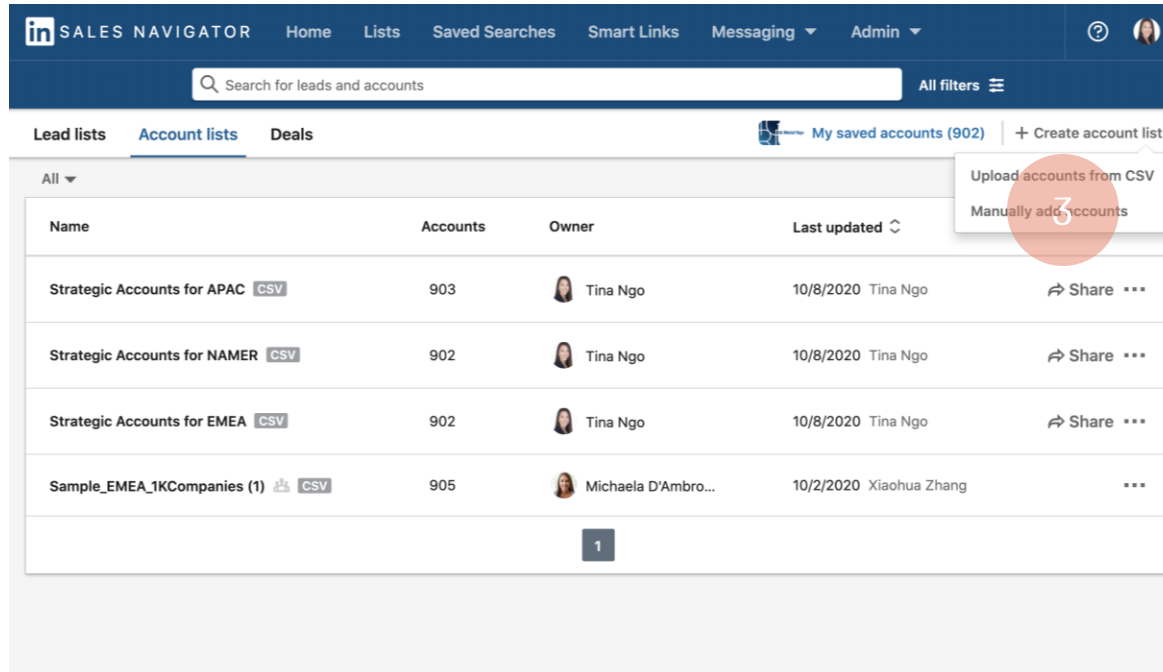
Upload accounts from CSV  
Manually add accounts

## STEP 2

Select “Account Lists”, which is the Account Lists Hub

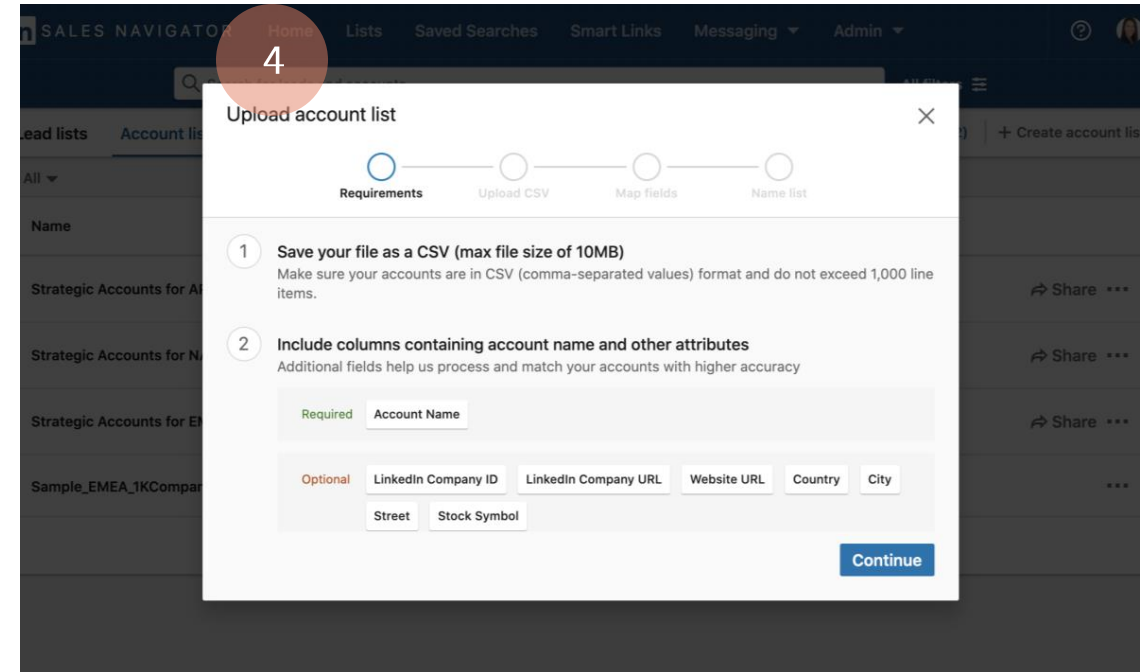
# How It Works: .CSV Uploads to Account Lists

Available to Enterprise users (Teams support coming soon)



## STEP 3

Choose the “Upload accounts from CSV” from the dropdown menu labelled “Create account list”, in the top right corner



## STEP 4

Follow the walk-through instructions:

1. Save file as a .CSV
2. Upload .CSV file
3. Map account fields to column headers in .CSV file
4. Name the list and add list description



# How It Works: .CSV Uploads to Account Lists

Available to Enterprise users (Teams support coming soon)

The screenshot shows the LinkedIn Sales Navigator interface. The top navigation bar includes 'SALES NAVIGATOR', 'Home', 'Lists', 'Saved Searches', 'Smart Links', 'Messaging', and 'Admin'. Below this is a search bar and a filter icon. The main section is titled 'Lead lists' and has tabs for 'Account lists' and 'Deals'. Under 'Account lists', there's a sub-tab 'My saved accounts (902)' and a '+ Create account list' button. The table below shows a list of account lists with columns: Name, Accounts, Owner, and Last updated. The table has 5 rows. The first four rows are for 'Strategic Accounts for LATAM', 'Strategic Accounts for APAC', 'Strategic Accounts for NAMER', and 'Strategic Accounts for EMEA'. The fifth row is for 'Sample\_EMEA\_1KCompanies (1)'. A red circle highlights the three dots menu for the 'Sample\_EMEA\_1KCompanies (1)' list, which is open, showing options: 'Download match report', 'Make a copy', 'View list info', and 'Delete'.

Name	Accounts	Owner	Last updated
Strategic Accounts for LATAM <span>CSV</span>	903	Tina Ngo	10/8/2020 Tina Ngo
Strategic Accounts for APAC <span>CSV</span>	903	Tina Ngo	10/8/2020 Tina Ngo
Strategic Accounts for NAMER <span>CSV</span>	902	Tina Ngo	10/8/2020 Tina Ngo
Strategic Accounts for EMEA <span>CSV</span>	902	Tina Ngo	10/8/2020 Tina Ngo
Sample_EMEA_1KCompanies (1) <span>CSV</span>	905	Michaela D'Ambro...	10/2/2020 Xiaohua Zhang

## STEP 5

When finished, the new list will appear in the Account List Hub.

Select the three dots to the right of the new Account List and click “Download match report” to review match results.

- Users can review match results including accounts that LinkedIn didn't find a match for

*Tip:*

- Click into the new Account List and save accounts to start receiving Alerts on the homepage or use the Account List as a search filter

# .CSV Uploads to Account Lists: Sample Match Report

The match report is a downloadable CSV file that includes all the columns that a user has uploaded, followed by outcomes and LinkedIn's match results. **The report will tell users how many quality matches LinkedIn found.**

*Note: Only matched accounts will be added to a user's generated Account List*

A	B	C	D	E	F	G	H
Account Name	Account Website	Outcome	Matched Company Name	Matched Company ID	Matched Company Url	Matched Company Sales Nav Url	Match Confidence Score (0-5/Highest)
Bouwmij Janssen	www.bouwmij-janssen.nl	MATCHED	Bouwmij Janssen	902409	http://www.bouwmij-janssen.nl	https://www.linkedin.com/sales/company/902409	5
Northland Controls	www.northlandcontrols.com	MATCHED	Northland Controls	759424	http://www.northlandcontrols.com	https://www.linkedin.com/sales/company/759424	5
Silcock Dawson & Partners	www.silcockdawson.co.uk	MATCHED	Silcock Dawson and Partners	2107007	http://www.silcockdawson.co.uk	https://www.linkedin.com/sales/company/2107007	2
Lanxess Ltd	www.lanxess.com	MATCHED	LANXESS	164682	https://www.lanxess.com	https://www.linkedin.com/sales/company/164682	3
Unicontrols a.s.	www.unicontrols.cz	MATCHED	UniControls a.s.	1673089	http://www.unicontrols.cz	https://www.linkedin.com/sales/company/1673089	4
Merial	www.merial.com	MATCHED	Merial	164939	https://www.boehringer-ingelheim.com/	https://www.linkedin.com/sales/company/164939	5
Serco Ltd	www.serco.com	MATCHED	Serco	3647	http://www.serco.com/	https://www.linkedin.com/sales/company/3647	3
Grammer AG	www.grammer.com	MATCHED	Grammer AG	59248	https://www.grammer.com/en/	https://www.linkedin.com/sales/company/59248	2
GE Healthcare Ltd	www.gehealthcare.com	MATCHED	GE Healthcare	1016	http://www.gehealthcare.com	https://www.linkedin.com/sales/company/1016	4

Data in original  
CSV file

LinkedIn matches

Outcome:

- 'Matched' – LinkedIn found a **potential** match
- 'Non\_Matched' – LinkedIn did not find any match

Match Confidence Score:

- A score range from 0-5, which indicates our level confidence for each match
- '5' = 80-100% confidence; '4' = 60-80% confidence; '3' = 40-60% confidence; '2' = 20-40% confidence; '1' = 0-20% confidence; '0' = unable to match

For additional information, visit this [help desk link](#).



View CRM  
Opportunities

## Details: CRM Opportunities in Account Lists

Available to Enterprise users with CRM Sync for Salesforce  
(Microsoft Dynamics 365 Sales support coming soon)

# CRM Opportunities in Account Lists

Available to Enterprise users with CRM Sync for Salesforce  
(Dynamics support coming soon)

The screenshot displays the Sales Navigator interface. On the left, the 'Account lists' section shows 'Jack's 2020 Assigned Accounts' with 4 total results. The main table lists accounts with columns for Name, Saved leads, Last outreach, and Notes. The accounts listed are IkTix, Flexis, Freshing, Mintome, and Oustia. On the right, a sidebar titled 'CRM Opportunities at IkTix' shows three opportunities: 'Big Buck Opportunity' (Owner: Me, Stage: Negotiation, Closes on 10/03/2020), 'Upsell opportunity' (Owner: Daisy Hunter, Stage: Qualification, Closes on 06/03/2021), and 'Integrated solution opportunity' (Owner: Jyoti Joshi, Stage: Proposal, Closes on 03/31/2023).

Name	Saved leads	Last outreach	Notes
IkTix CRM Internet 36,210 employees San Francisco, California - United States	3	No activity	Add note
Flexis CRM Internet 596 employees San Francisco, California - United States	3	9/12/2020 Message received from An	Add note
Freshing CRM Internet 14,378 employees San Francisco, California - United States	2	15 mins ago Message sent to Jane	Add note
Mintome CRM Internet 1,203 employees San Francisco, California - United States	3	7/14/2020 Connection request accepted by Cheri	Add note
Oustia CRM Internet 874 employees San Francisco, California - United States	1	No activity	Add note

View CRM opportunity information to understand status and identify collaborators

Users will be able to review CRM opportunity information such as opportunity close date and stage to help stay focused.

Information shown includes:

- Opportunity Owner
- Opportunity Name
- Opportunity Stage
- Close Date

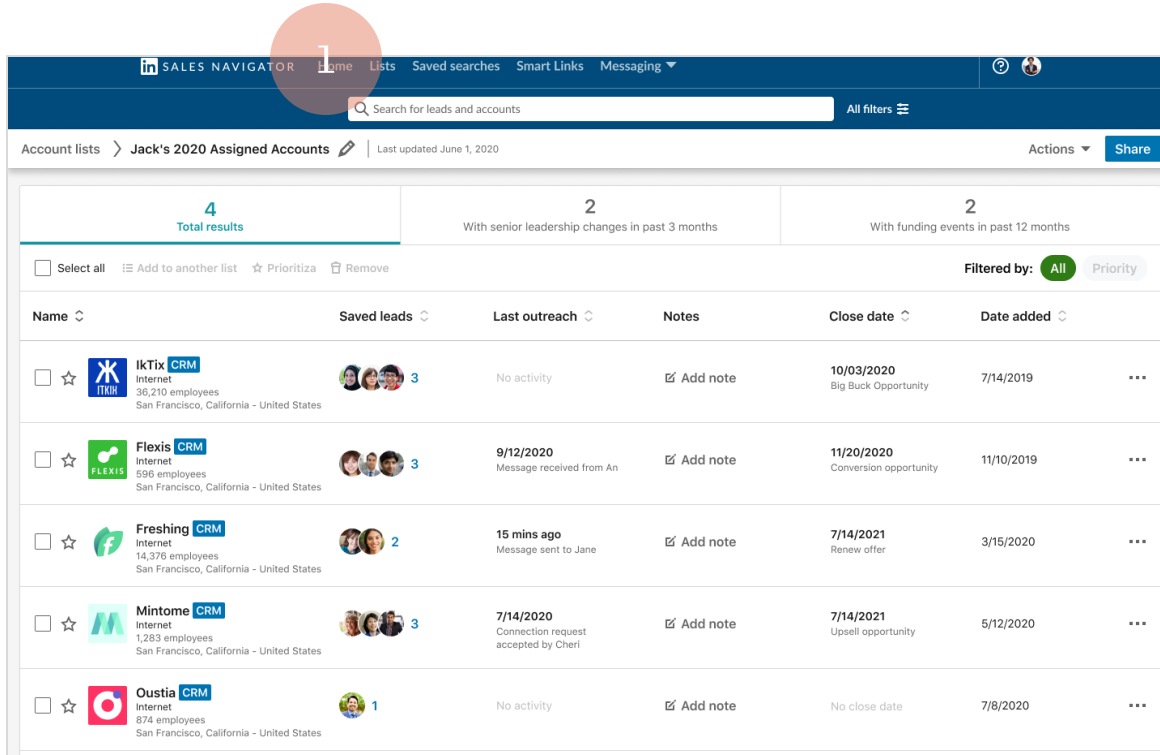
Users will also be able to filter by owner to understand which colleagues have worked or are working on a particular account to collaborate more effectively.

**Please note:** This feature is only available to Enterprise users with CRM Sync for Salesforce enabled. Access for users on Microsoft Dynamics 365 Sales with CRM Sync enabled will receive this feature at a later date.

# How It Works: CRM Opportunities in Account Lists

Available to Enterprise users with CRM Sync for Salesforce (Dynamics support coming soon)

1


















SALES NAVIGATOR Home Lists Saved searches Smart Links Messaging

Search for leads and accounts All filters

Account lists > Jack's 2020 Assigned Accounts Last updated June 1, 2020 Actions Share

4 Total results 2 With senior leadership changes in past 3 months 2 With funding events in past 12 months

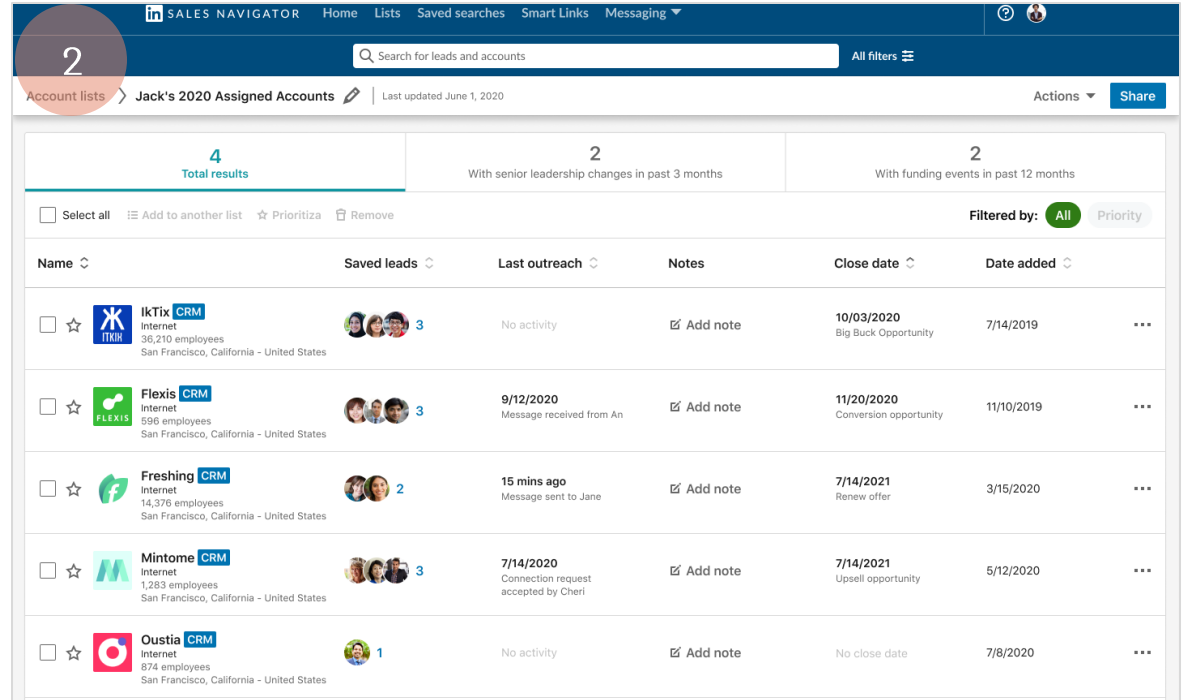
Select all Add to another list Prioritize Remove Filtered by: All Priority

Name	Saved leads	Last outreach	Notes	Close date	Date added	
<input type="checkbox"/>  iKtix CRM Internet 36,210 employees San Francisco, California - United States	 3	No activity	 Add note	10/03/2020 Big Buck Opportunity	7/14/2019	...
<input type="checkbox"/>  Flexis CRM Internet 596 employees San Francisco, California - United States	 3	9/12/2020 Message received from An	 Add note	11/20/2020 Conversion opportunity	11/10/2019	...
<input type="checkbox"/>  Freshing CRM Internet 14,376 employees San Francisco, California - United States	 2	15 mins ago Message sent to Jane	 Add note	7/14/2021 Renew offer	3/15/2020	...
<input type="checkbox"/>  Mintome CRM Internet 1,283 employees San Francisco, California - United States	 3	7/14/2020 Connection request accepted by Cheri	 Add note	7/14/2021 Upsell opportunity	5/12/2020	...
<input type="checkbox"/>  Oustia CRM Internet 874 employees San Francisco, California - United States	 1	No activity	 Add note	No close date	7/8/2020	...

STEP 1

In Sales Navigator, select “Lists”

2


















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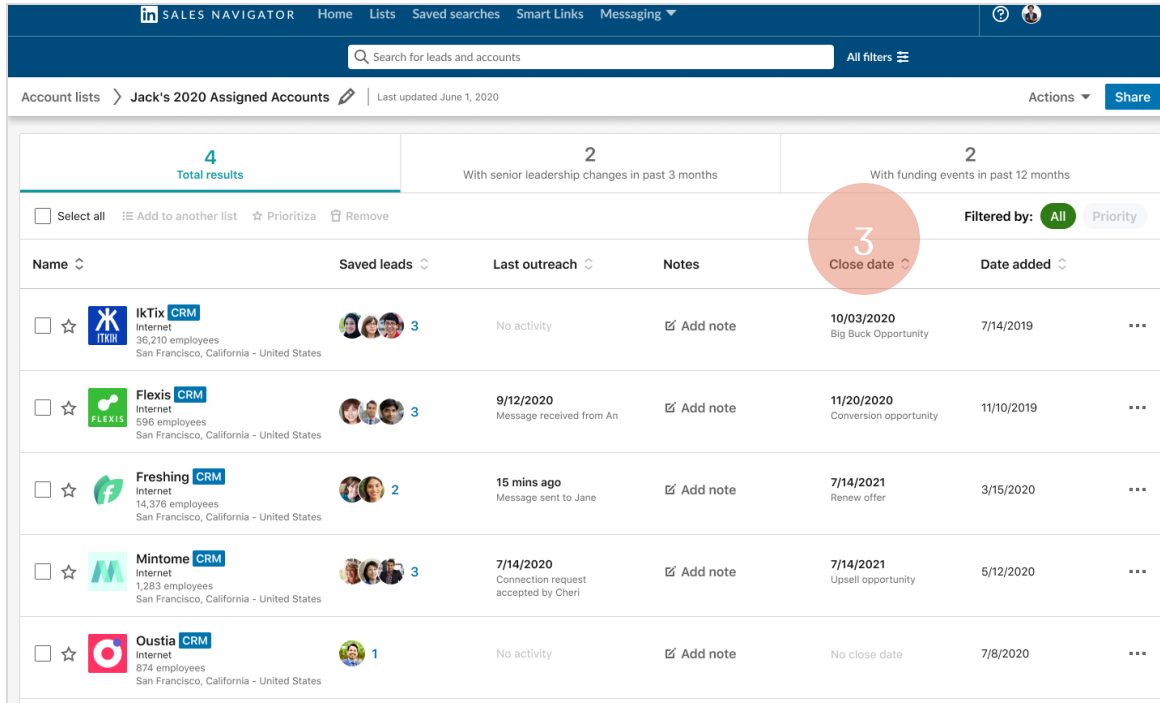
STEP 2

Select “Account Lists”, which is the Account Lists Hub

Note: Users must have at least 1 matched account to their CRM

# How It Works: CRM Opportunities in Account Lists

Available to Enterprise users with CRM Sync for Salesforce (Dynamics support coming soon)



SALES NAVIGATOR Home Lists Saved searches Smart Links Messaging

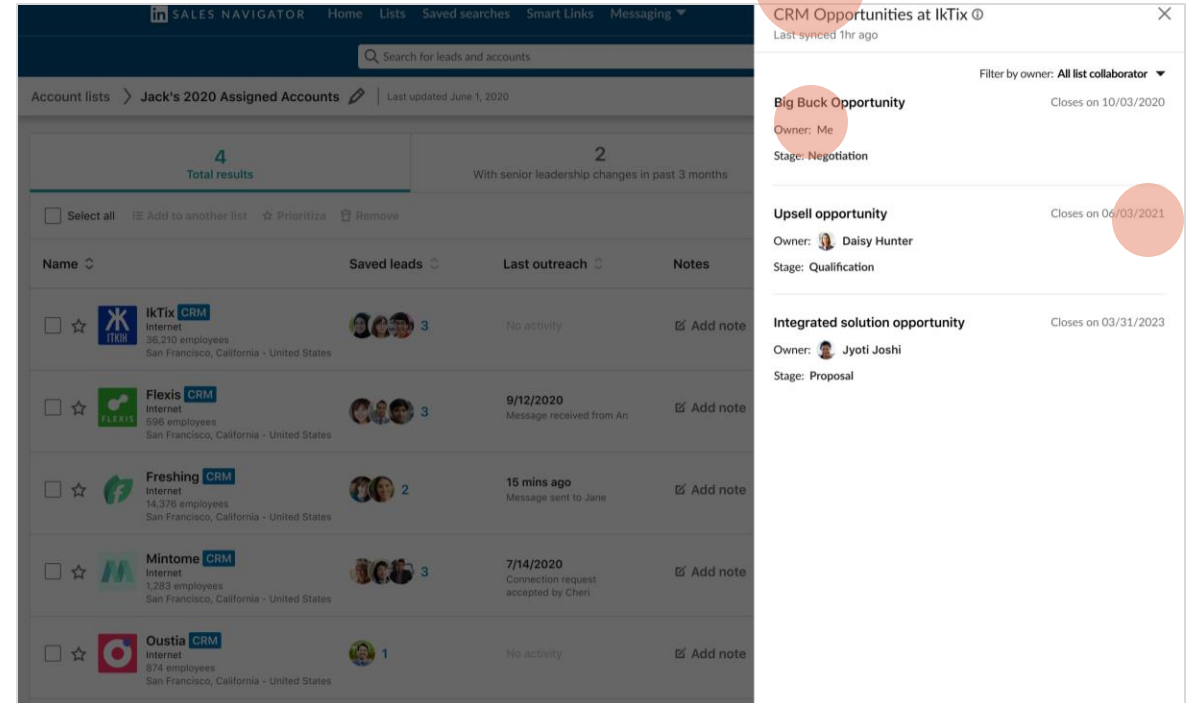
Search for leads and accounts All filters

Account lists > Jack's 2020 Assigned Accounts Last updated June 1, 2020 Actions Share

4 Total results		2 With senior leadership changes in past 3 months		2 With funding events in past 12 months	
Name	Saved leads	Last outreach	Notes	3 Close date	Date added
<input type="checkbox"/> iKtix CRM Internet 36,210 employees San Francisco, California - United States	3	No activity	Add note	10/03/2020 Big Buck Opportunity	7/14/2019
<input type="checkbox"/> Flexis CRM Internet 596 employees San Francisco, California - United States	3	9/12/2020 Message received from An	Add note	11/20/2020 Conversion opportunity	11/10/2019
<input type="checkbox"/> Freshing CRM Internet 14,376 employees San Francisco, California - United States	2	15 mins ago Message sent to Jane	Add note	7/14/2021 Renew offer	3/15/2020
<input type="checkbox"/> Mintome CRM Internet 1,283 employees San Francisco, California - United States	3	7/14/2020 Connection request accepted by Cheri	Add note	7/14/2021 Upsell opportunity	5/12/2020
<input type="checkbox"/> Oustia CRM Internet 874 employees San Francisco, California - United States	1	No activity	Add note	No close date	7/8/2020

## STEP 3

An additional column “Close date” will appear with opportunity name and close date information



SALES NAVIGATOR Home Lists Saved searches Smart Links Messaging

Search for leads and accounts

Account lists > Jack's 2020 Assigned Accounts Last updated June 1, 2020

CRM Opportunities at iKtix Last synced 1hr ago

Filter by owner: All list collaborator

4 Total results		2 With senior leadership changes in past 3 months	
Name	Saved leads	Last outreach	Notes
<input type="checkbox"/> iKtix CRM Internet 36,210 employees San Francisco, California - United States	3	No activity	Add note
<input type="checkbox"/> Flexis CRM Internet 596 employees San Francisco, California - United States	3	9/12/2020 Message received from An	Add note
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<input type="checkbox"/> Oustia CRM Internet 874 employees San Francisco, California - United States	1	No activity	Add note

**Big Buck Opportunity** Closes on 10/03/2020  
Owner: Me  
Stage: Negotiation

**Upsell opportunity** Closes on 06/03/2021  
Owner: Daisy Hunter  
Stage: Qualification

**Integrated solution opportunity** Closes on 03/31/2023  
Owner: Jyoti Joshi  
Stage: Proposal

## STEP 4

Clicking on an opportunity of an account will open a side panel, which will show all list collaborators' opportunities associated with that account, sorted by close date

Note: Users must have at least 1 matched account to their CRM



Manually prioritize  
Accounts

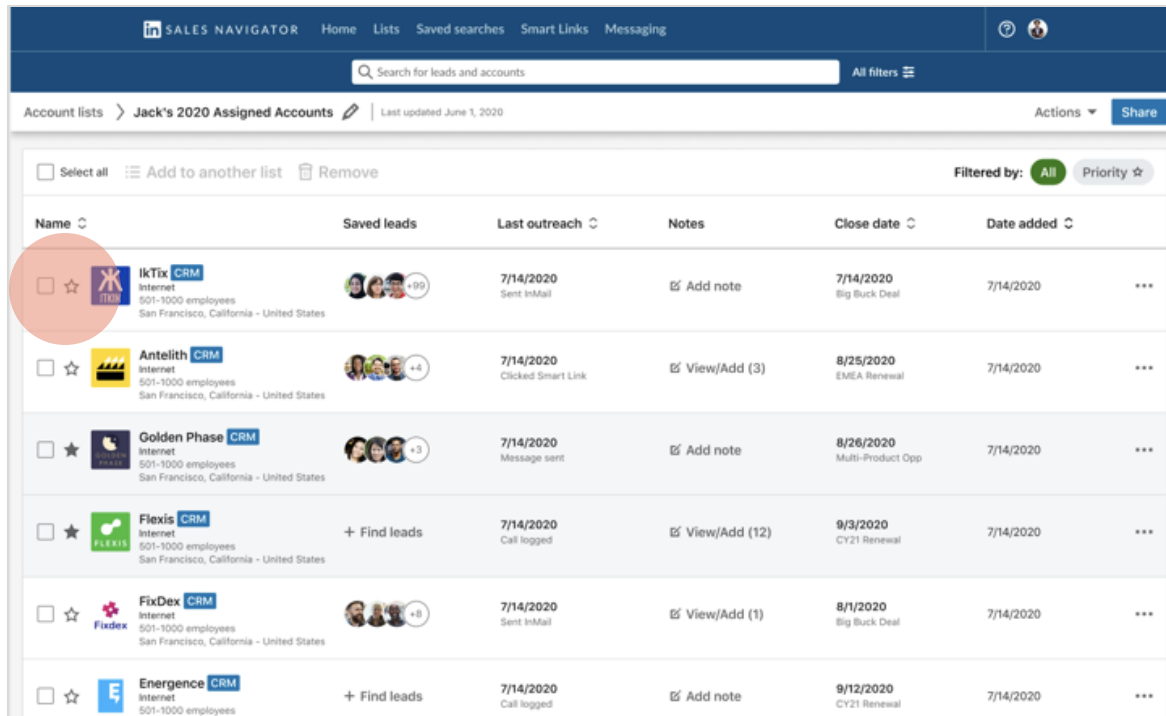
# Details: Manual Account Prioritization

Available to all Sales Navigator users



# Manual Account Prioritization

Available to all Sales Navigator users



The screenshot displays the LinkedIn Sales Navigator interface. At the top, there's a navigation bar with 'SALES NAVIGATOR' and links for Home, Lists, Saved searches, Smart Links, and Messaging. Below this is a search bar and a filter icon. The main section shows 'Account lists' with a specific list named 'Jack's 2020 Assigned Accounts'. The list is filtered by 'All' and 'Priority'. The table below lists several accounts with columns for Name, Saved leads, Last outreach, Notes, Close date, and Date added. A red circle highlights the star icon next to the 'IkTix' account, indicating the 'Star' action for prioritization.

Name	Saved leads	Last outreach	Notes	Close date	Date added
<input type="checkbox"/> <input checked="" type="star"/> <b>IkTix CRM</b> Internet 501-1000 employees San Francisco, California - United States	+99	7/14/2020 Sent InMail	Add note	7/14/2020 Big Buck Deal	7/14/2020
<input type="checkbox"/> <input checked="" type="star"/> <b>Antelith CRM</b> Internet 501-1000 employees San Francisco, California - United States	+4	7/14/2020 Clicked Smart Link	View/Add (3)	8/25/2020 EMEA Renewal	7/14/2020
<input type="checkbox"/> <input checked="" type="star"/> <b>Golden Phase CRM</b> Internet 501-1000 employees San Francisco, California - United States	+3	7/14/2020 Message sent	Add note	8/26/2020 Multi-Product Opp	7/14/2020
<input type="checkbox"/> <input checked="" type="star"/> <b>Flexis CRM</b> Internet 501-1000 employees San Francisco, California - United States	+ Find leads	7/14/2020 Call logged	View/Add (12)	9/3/2020 CY21 Renewal	7/14/2020
<input type="checkbox"/> <input checked="" type="star"/> <b>FixDex CRM</b> Internet 501-1000 employees San Francisco, California - United States	+8	7/14/2020 Sent InMail	View/Add (1)	8/1/2020 Big Buck Deal	7/14/2020
<input type="checkbox"/> <input checked="" type="star"/> <b>Energence CRM</b> Internet 501-1000 employees	+ Find leads	7/14/2020 Call logged	Add note	9/12/2020 CY21 Renewal	7/14/2020

Quickly prioritize accounts to determine areas of focus

Users will be able to 'Star' Accounts to prioritize after reviewing key information in a List, such as renewal date and opportunity status.

## How it works:

- From an Account List, users can review the latest insights (e.g. last outreach, close date) and start prioritizing their accounts by clicking the star to the left of the account name



View LinkedIn  
Outreach  
Activities

# Details: LinkedIn Outreach Activity in Account Lists

Available to all Sales Navigator users

# LinkedIn Outreach Activity in Account Lists

Available to all Sales Navigator users

The screenshot displays the LinkedIn Sales Navigator interface. The top navigation bar includes 'SALES NAVIGATOR', 'Home', 'Lists', 'Saved searches', 'Smart Links', and 'Messaging'. Below this is a search bar for leads and accounts. The main section shows 'Account lists' with a filter for 'Jack's 2020 Assigned Accounts', last updated on June 1, 2020. A table lists several accounts with columns for 'Name', 'Saved leads', 'Last outreach', and 'Notes'. The accounts listed are iktix CRM, Freshing CRM (highlighted), Flexis CRM, Oustia CRM, Mintome CRM, and Antelith CRM. To the right, a sidebar titled 'Outreach activity at Freshing' shows a history of interactions with specific contacts: An Wen (message sent), Jane Smith (Smart Link viewed), Karen Gouse (message sent, Smart Link viewed, connection request accepted, connection request sent, message sent), Karen Gouse (message sent), Tom Vetrovs (message received), Filip Maley (message received), and Terence Welch (message received).

Name	Saved leads	Last outreach	Notes
iktix CRM Internet 501-1000 employees San Francisco, California - United States		No activity	
Freshing CRM Internet 501-1000 employees San Francisco, California - United States		15 mins ago Message sent to Jane	
Flexis CRM Internet 501-1000 employees San Francisco, California - United States		7/14/2020 Message received from An	
Oustia CRM Internet 501-1000 employees San Francisco, California - United States		No activity	
Mintome CRM Internet 501-1000 employees San Francisco, California - United States		7/14/2020 Connection request accepted by Cheri	
Antelith CRM Internet 501-1000 employees San Francisco, California - United States		7/14/2020 Connection request received by John	

Outreach activity at Freshing

- An Wen  
→ Message sent to An  
15 mins ago
- Jane Smith  
✓ Smart Link viewed by Jane  
View more  
4 hrs ago
- Karen Gouse  
✓ Message sent to Karen  
✓ Smart Link viewed by Karen  
✓ Connection request accepted by Karen  
→ Connection request sent to Karen  
→ Message sent to Karen  
6/27  
6/26  
6/22  
6/21  
6/12
- Karen Gouse  
→ Message sent to Karen  
View more  
6/27
- Tom Vetrovs  
→ Message received from you  
View more  
6/26
- Filip Maley  
→ Received a message from you  
5/12
- Terence Welch  
→ Received a message from you  
5/3

Determine the next best action by understanding key LinkedIn outreach activities.

Users will see a history of their LinkedIn interactions with an Account (e.g. Connection Requests, Messages, Smart Links) from their Sales Navigator Account Lists.

This will give users greater visibility to make informed decisions on the next best action and avoid duplicate efforts.

The information users will be shown includes:

- InMail activity (sent date and response date)
- Smart Link click date
- Message activity (sent date and response date)
- Connection Request sent date and accepted date

*Please note: Some information may take up to 12 hours to update*

# How It Works: LinkedIn Outreach Activity in Account Lists

Available to all Sales Navigator users

The screenshot shows the LinkedIn Sales Navigator interface. The top navigation bar includes 'SALES NAVIGATOR', 'Home', 'Lists', 'Saved searches', 'Smart Links', and 'Messaging'. Below the navigation bar is a search bar labeled 'Search for leads and accounts'. The main content area displays 'Account lists' with a filter for 'Jack's 2020 Assigned Accounts' and a note 'Last updated June 1, 2020'. A table lists accounts with columns for 'Name', 'Saved leads', 'Last outreach', and 'Notes'. The 'Last outreach' column is highlighted in blue. To the right of the table, a side panel titled 'Outreach activity at Freshing' displays a list of recent outreach activities for the selected account, including messages sent and received, and connection requests.

Name	Saved leads	Last outreach	Notes
IKTix CRM Internet 501-1000 employees San Francisco, California - United States		No activity	<a href="#">Add note</a>
Freshing CRM Internet 501-1000 employees San Francisco, California - United States		15 mins ago Message sent to Jane	<a href="#">Add note</a>
Flexis CRM Internet 501-1000 employees San Francisco, California - United States		7/14/2020 Message received from An	<a href="#">Add note</a>
Oustia CRM Internet 501-1000 employees San Francisco, California - United States		No activity	<a href="#">Add note</a>
Mintome CRM Internet 501-1000 employees San Francisco, California - United States		7/14/2020 Connection request accepted by Cheri	<a href="#">Add note</a>
Antelith CRM Internet 501-1000 employees San Francisco, California - United States		7/14/2020 Connection request received by John	<a href="#">Add note</a>

Outreach activity at Freshing

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✓ Message sent to Karen  
6/27  
✓ Smart Link viewed by Karen  
6/26  
✓ Connection request accepted by Karen  
6/22  
→ Connection request sent to Karen  
6/21  
→ Message sent to Karen  
6/12  
View less
- Karen Gouse  
→ Message sent to Karen  
6/27  
View more
- Tom Vetrovs  
→ Message received from you  
6/26  
View more
- Filp Maley  
→ Received a message from you  
5/12
- Terence Welch  
→ Received a message from you  
5/3

An additional column “Outreach Activity” will appear in the user’s **Account List** with most recent activity displayed.

The screenshot shows the LinkedIn Sales Navigator interface. The top navigation bar includes 'SALES NAVIGATOR', 'Home', 'Lists', 'Saved searches', 'Smart Links', and 'Messaging'. Below the navigation bar is a search bar labeled 'Search for leads and accounts'. The main content area displays 'Account lists' with a filter for 'Jack's 2020 Assigned Accounts' and a note 'Last updated June 1, 2020'. A table lists accounts with columns for 'Name', 'Saved leads', 'Last outreach', and 'Notes'. The 'Last outreach' column is highlighted in blue. To the right of the table, a side panel titled 'Outreach activity at Freshing' displays a list of recent outreach activities for the selected account, including messages sent and received, and connection requests.

Name	Saved leads	Last outreach	Notes
IKTix CRM Internet 501-1000 employees San Francisco, California - United States		No activity	<a href="#">Add note</a>
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Oustia CRM Internet 501-1000 employees San Francisco, California - United States		No activity	<a href="#">Add note</a>
Mintome CRM Internet 501-1000 employees San Francisco, California - United States		7/14/2020 Connection request accepted by Cheri	<a href="#">Add note</a>
Antelith CRM Internet 501-1000 employees San Francisco, California - United States		7/14/2020 Connection request received by John	<a href="#">Add note</a>

Outreach activity at Freshing

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6/26  
✓ Connection request accepted by Karen  
6/22  
→ Connection request sent to Karen  
6/21  
→ Message sent to Karen  
6/12  
View less
- Karen Gouse  
→ Message sent to Karen  
6/27  
View more
- Tom Vetrovs  
→ Message received from you  
6/26  
View more
- Filp Maley  
→ Received a message from you  
5/12
- Terence Welch  
→ Received a message from you  
5/3

Selecting an activity for an account will open a side panel, which will show all their own LinkedIn outreach activity (up to 250 entities).

# Additional Updates

A large circle is centered on the page. The top half of the circle is a light beige color, and the bottom half is a dark green color. The circle is set against a light green background that covers the entire page.

# Homepage Enhancements & New Alerts

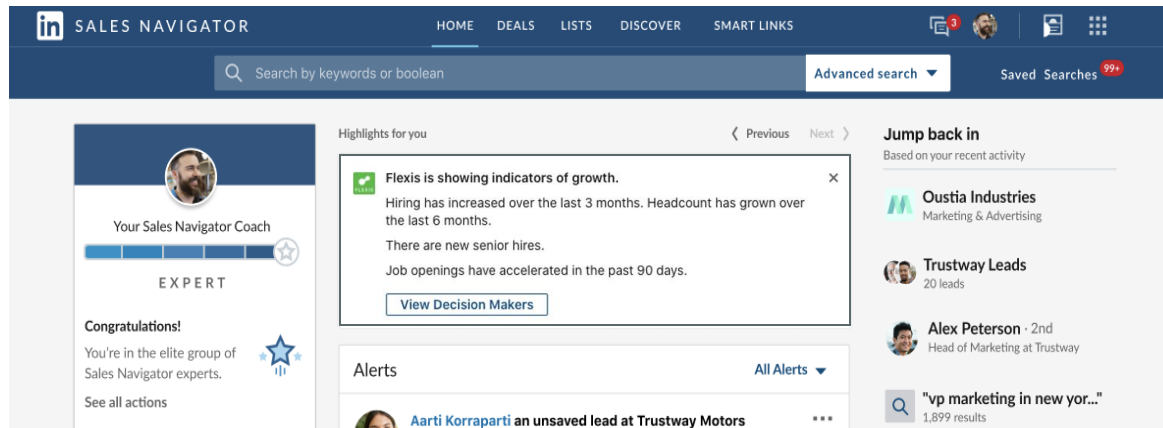
Available to all Sales Navigator users



Community Idea

# Account Insights on the Homepage

Available to all Sales Navigator users



Sales Navigator users struggle with gaining an accurate and deep intuitive understanding of their leads and accounts based off the various standalone Alerts they receive.

This quarter we are introducing Account Insights, which will leverage existing Alerts and group them to paint a clearer picture for sellers on whether an account demonstrates a good opportunity to pursue, as well as who might be the right decision maker from the account.

Users will see four types of Account Insights themes:


- 1) Accounts that are growing
- 2) Leads at saved account are showing interest
- 3) Trending alerts
- 4) Decision maker highlights

**Please Note:** All themes will contain a list of existing alerts that fits into the respective theme of the Account Insight.



# New Account Alerts


Available to all Sales Navigator users



**Flexis** has accelerated growth. There has been increased hiring over the last 3 months. Headcount has grown year over year. ...

Computer Software · 1001-5000 employees  
1 week

[View Decision Makers](#)




**Flexis** recently had layoffs. ...

Computer Software · 10001+ employees  
2 days

Flexis layoffs include restaurant workers and food cart vendors.


[View article](#)



**Flexis** is a new account to consider. **Orbit** employees have been moving here at an increased rate. ...

Computer Software · 10001+ employees  
23 hours

[View Employees](#)



**Flexis** has slowed growth. There has been reduced hiring and less job openings than usual. ...

Computer Software · 1001-5000 employees  
1 week

[View Account](#)

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

Users will see the following new Alerts:

- **Account Growth Alert** - Signals when a saved account is experiencing an increase in employee growth in the past 90 days.
- **Layoffs Alert** – Signals when a saved account is experiencing layoffs.
- **Talent Moving to Another Account Alert** – Signals when employees at saved account are joining a new company.
- **Account Slowing Growth Alert** – Signals when a saved account is experiencing a decrease in employee growth in the past 90 days.

**Please Note:** To receive these types of Alerts, please make sure the user has saved accounts. No setup is required.



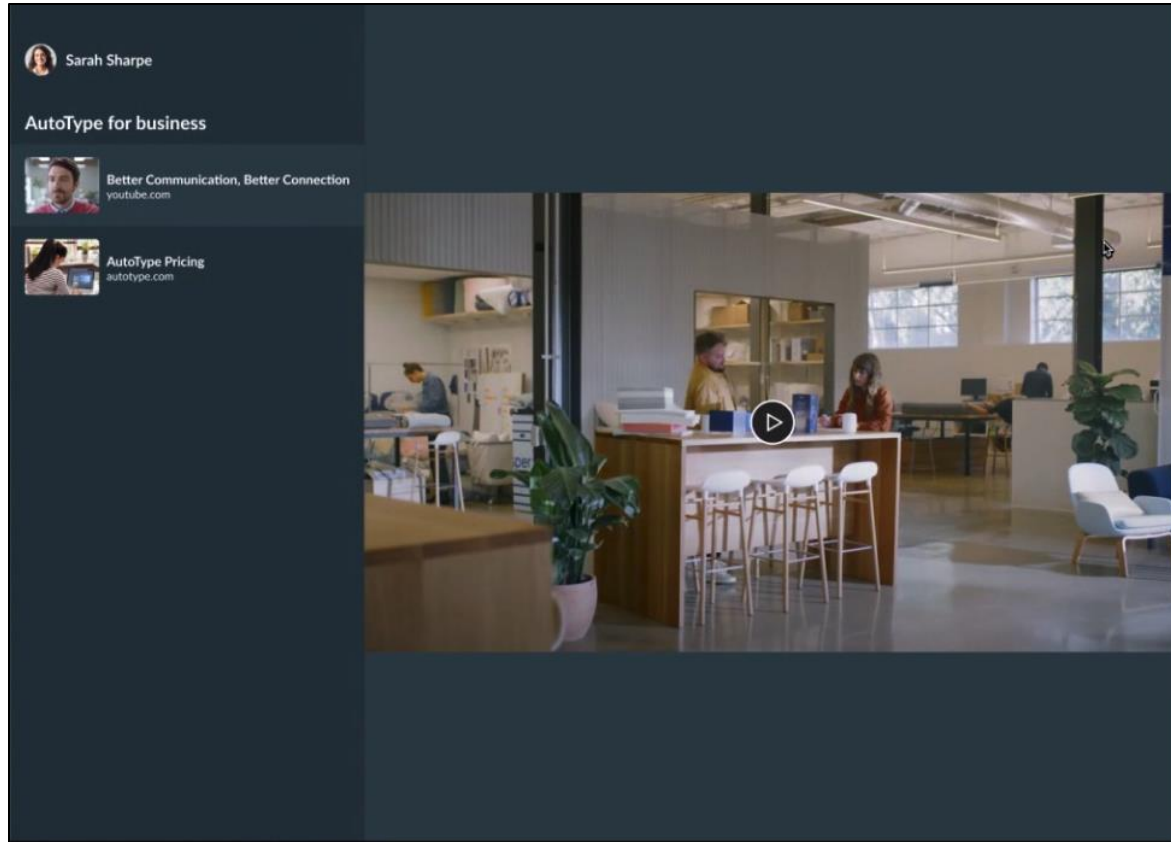
Community Idea

# Smart Links Enhancements

Available to Team and Enterprise users

# New Supported Asset Types, Prevent Downloads, and Re-Title Assets

Available to Team and Enterprise users



Tip: YouTube links and native video files are playable in the Smart Links viewer and will have available tracking on how long the video is watched

## New Supported Asset Types - URL, Video, YouTube:

In addition to asset types already supported by Smart Links (e.g. PPT, PDF), Sales Navigator users can now add URLs and videos to their Smart Links presentations, expanding the types of content they can share and track views on.

Smart Links will track the following engagement metrics for these asset types:

URLs (Desktop & Mobile)	Video/YouTube Video (Desktop & Mobile)
Link to website is clicked	How long video was viewed
Link was opened in a new tab	If video was downloaded – native video file
	If video was opened in new tab – YouTube

## Prevent Downloads & Re-title Assets:

- Sales Navigator users will now be able to prevent Smart Links recipients from downloading the assets in a Smart Link.
- Users will also be able to change the title associated with the assets inside their Smart Link presentations.

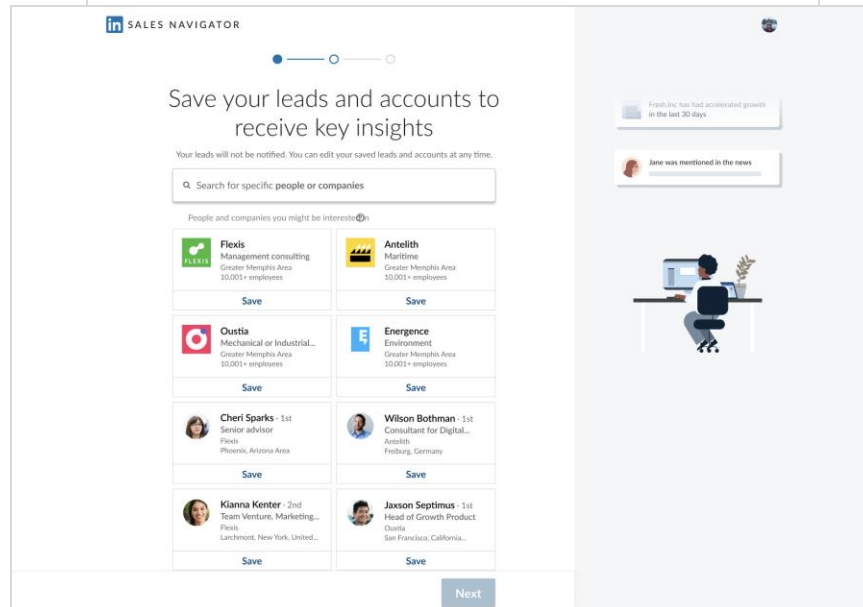
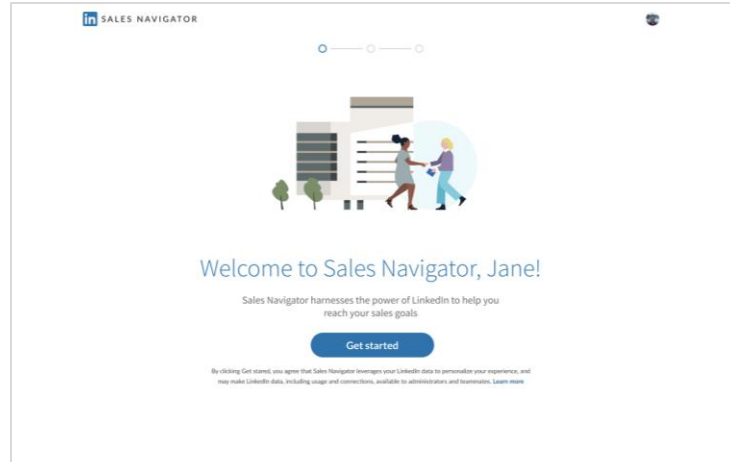


# New User Onboarding Flow

Available to all new Sales Navigator users

# New User Onboarding Flow

Available to all Sales Navigator users



## Onboarding Flow refresh for new users

First time Sales Navigator users will now see a refreshed onboarding flow, set up to ensure quick and streamlined onboarding into the product.

Users will be able to save accounts and leads during onboarding so they can immediately start receiving value from the product once onboarding is complete.

**Please Note:** This will only be applicable for new users and will not affect existing users unless they go through the onboarding flow again.



# ROI Reporting Updates

Available to all Team and Enterprise Admins with CRM Sync enabled

# ROI Reporting Updates

Available to Team and Enterprise Admins with CRM Sync enabled



ROI Reporting helps customers demonstrate the value of their Sales Navigator program. As part of our update, we will provide three additional capabilities:

- View total value of Sales Navigator sourced and influenced revenue (opt-in)
- View the impact of more activities on Sales Navigator sourced and influenced revenue
  - CRM Contact Created
  - Sales Navigator Messages Sent
  - Smart Links Viewed
  - Alerts Engaged
- View the “Anatomy of a Deal” for more closed-won opportunities influenced by Sales Navigator: the 5 largest opportunities and the 15 most recent opportunities

**Please Note:** To request an ROI Report, please reach out to a LinkedIn Sales Navigator representative. Feature applies to Team & Enterprise Edition customers who have CRM Sync enabled.



# ROI Reporting Updates: How It Works

Available to Team and Enterprise Admins with CRM Sync enabled

ROI Reporting

Close

Measure the impact Sales Navigator has on your deals

Yes

Using select data from your CRM, your LinkedIn Relationship Manager can help you understand the value Sales Navigator provides your users. ROI reports help uncover the impact Sales Navigator has on the deals in your pipeline and the ways Social Selling helps drive better business outcomes. [Learn more](#)

Yes ☒

Show the total amount of influenced and sourced revenue in ROI report

Yes

Yes ☒

Select the currency in which you want to see ROI report

USD

To view the value of Sales Navigator influenced and sourced revenue, a Sales Navigator Admin must opt-in to allow LinkedIn to show this information within the ROI Report.

To opt-in, an Admin must take action on two Settings within the Admin Settings page:

- “Show the total amount of influenced and sourced revenue in ROI Report”
- “Select the currency in which you want to see ROI Report”

These settings are disabled by default.

**Please Note:** Privacy and security are critical to LinkedIn. We will only calculate and provide an aggregated value of revenue influenced or sourced by Sales Navigator activities. No individual opportunity-level revenue values will be shown.

# Additional updates and enhancements

## Alerts Enhancements [\(Community Idea!\)](#)

- Filter Alerts Feed by Account or Lead
  - Users will have the ability to filter alert types by account or lead; along with a search bar that will allow a user to search by alerts related to specific accounts or leads.

## Search Enhancements

- Company Headquarters filter [\(Community Idea!\)](#)
  - Users will see a new geographic filter option that will allow users to search for leads by the location of company headquarters.
- Account CRM filter [\(Community Idea!\)](#)
  - Similar to our lead CRM filter, users will be able to filter by accounts in your CRM (this filter requires CRM Sync to be enabled).

## Mobile Updates

- Buyer Interest Alerts Panel for Mobile
  - A side panel with an aggregate view of potential buyers' function, their department, time stamp, and geographic location will appear when a user clicks on a Buyer Interest Alert (Employee Alerts) on Mobile.
- Alerts Filter and Search
  - Users will now be able to filter their alerts by leads and accounts on mobile
  - An alerts search bar will allow a users to search their alerts for specific accounts or leads

## For Admins only - Account Center Updates

- "No Group" filter option in the Groups filter (found in the User List)
  - Admins can now quickly find who has yet to be assigned to a Group within the User List view by selecting "no group" under the Groups filter.



# Feature Transitions – Tags & Deals

# Tags and Deals will no longer be available by the end of 2020

## Tags

Applying to Professional, Team, and Enterprise users

**Between August and September 2020**, all applied Tags on Leads and Accounts were migrated to Lists.

Lists provide a more robust way for Sales Navigator users to organize their workflow and keep track of leads, accounts, and existing clients.

Tags Migration Process:

### August 2020

Ability to create Tags removed & Applied Tags migrated over to Lists

### September 2020

Tags migrated to Lists complete

### December 2020

Tags will no longer be available

## Deals

Applying to Team and Enterprise users

The most valued pieces of Deals will be absorbed throughout Sales Navigator as part of the user's workflow, and we will remove Deals as a standalone functionality.

Specifically, we've added/will add:

- **Contact Creation** provides the ability for a user to create a contact record in Microsoft Dynamics 365 Sales & SFDC from a Sales Navigator Lead Page or Lead List ([currently available](#))
- **Opportunity Information** will prioritize accounts based on factors such as industry, geography, account status (opportunity close date) and health to help stay focused ([launching this quarter](#))
- **Account Mapping** ([coming soon](#))

**Deals will no longer be available by the end of calendar year 2020**