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)		✓	✓

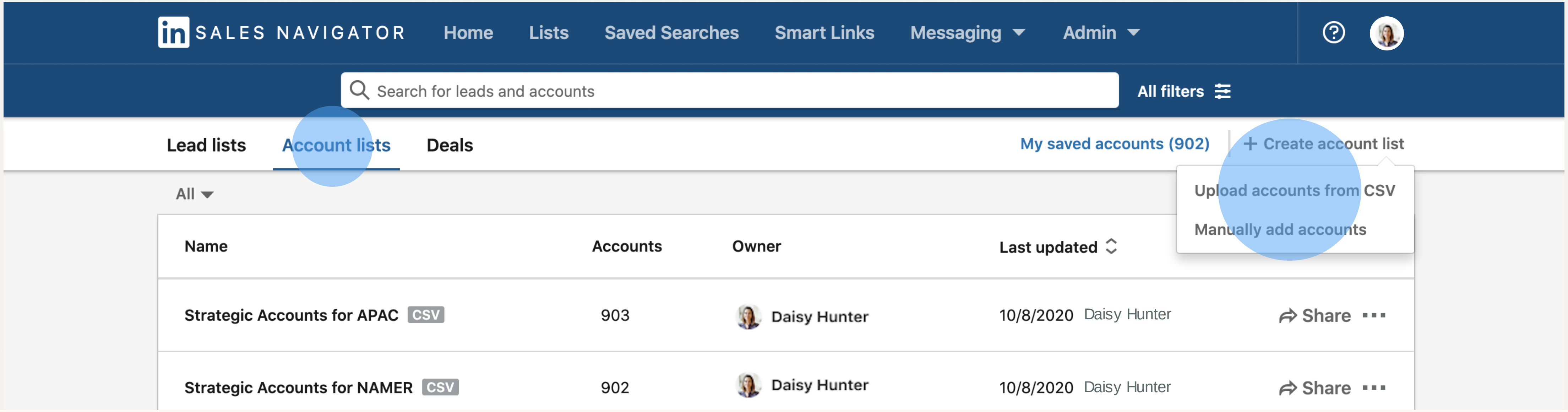
New Features to Cultivate Relationships

A day in the life

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



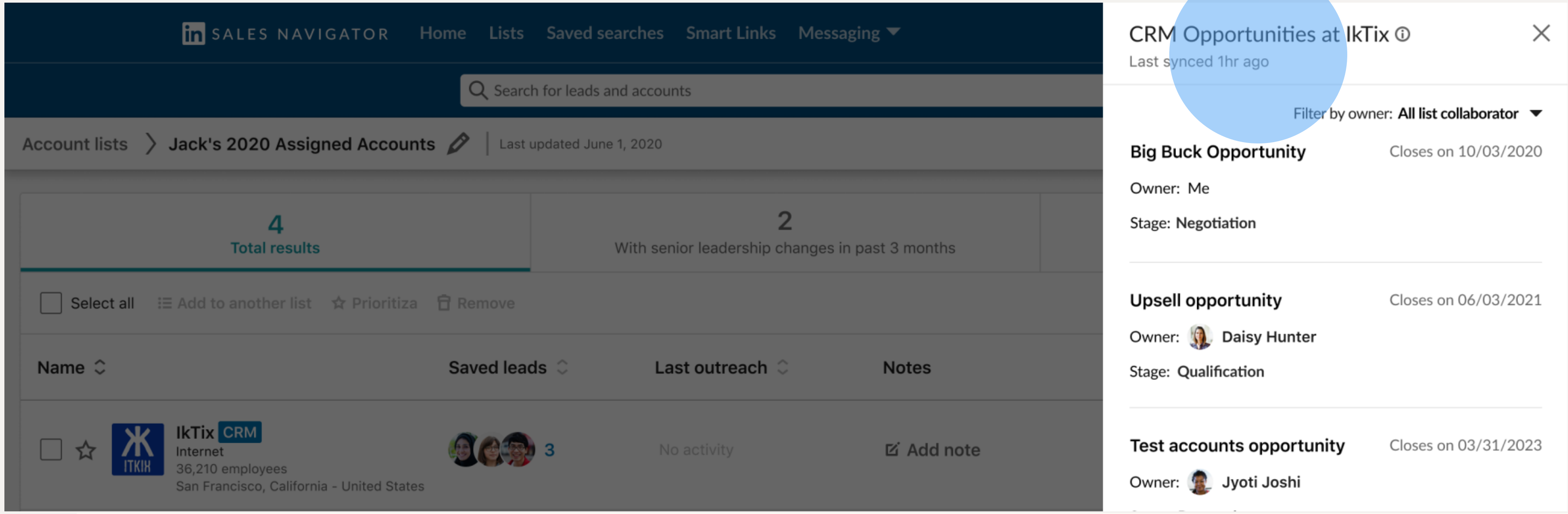
Start by **adding your book of business** into Sales Navigator

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



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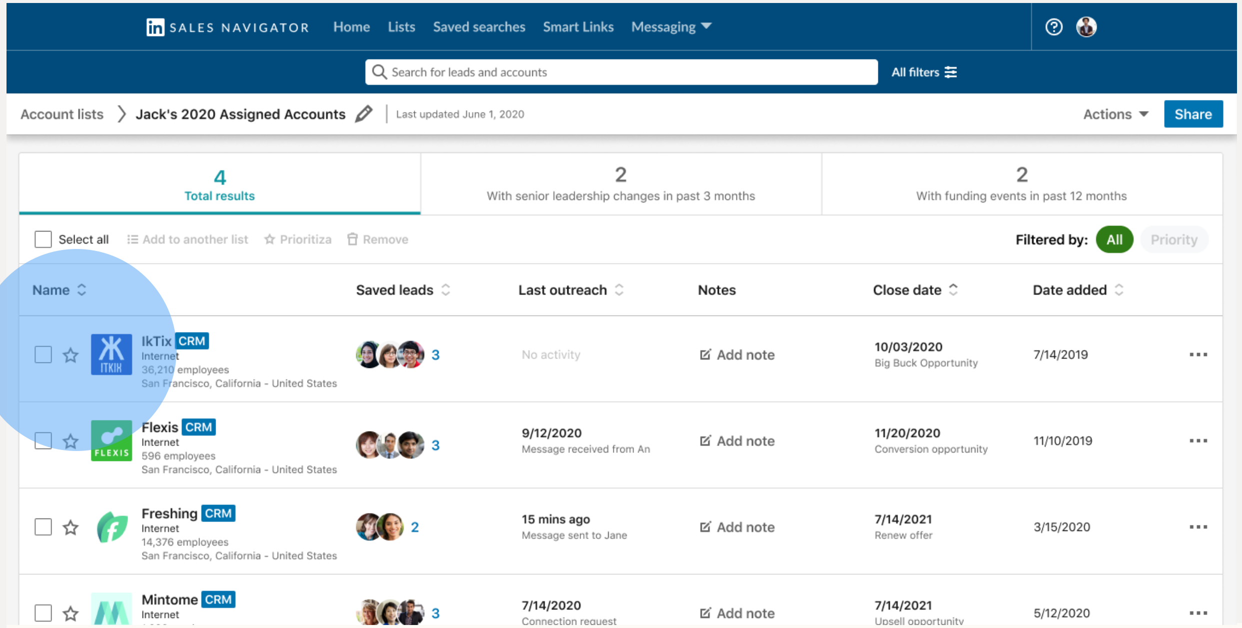
Jack then decides which of his accounts are a priority and 'stars' them



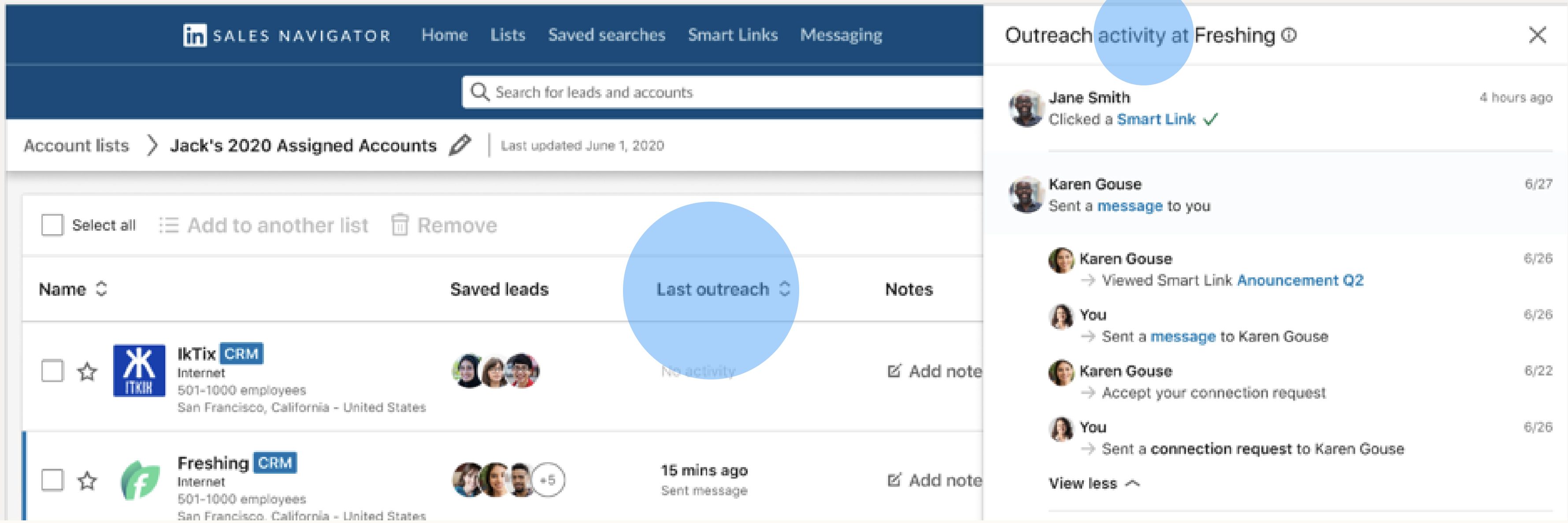
Start by adding your book of business into Sales Navigator

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 reviews his and his team's past LinkedIn outreach with his prioritized accounts before determining his next best action



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.

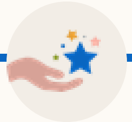
Start by **adding your book of business** into Sales Navigator

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

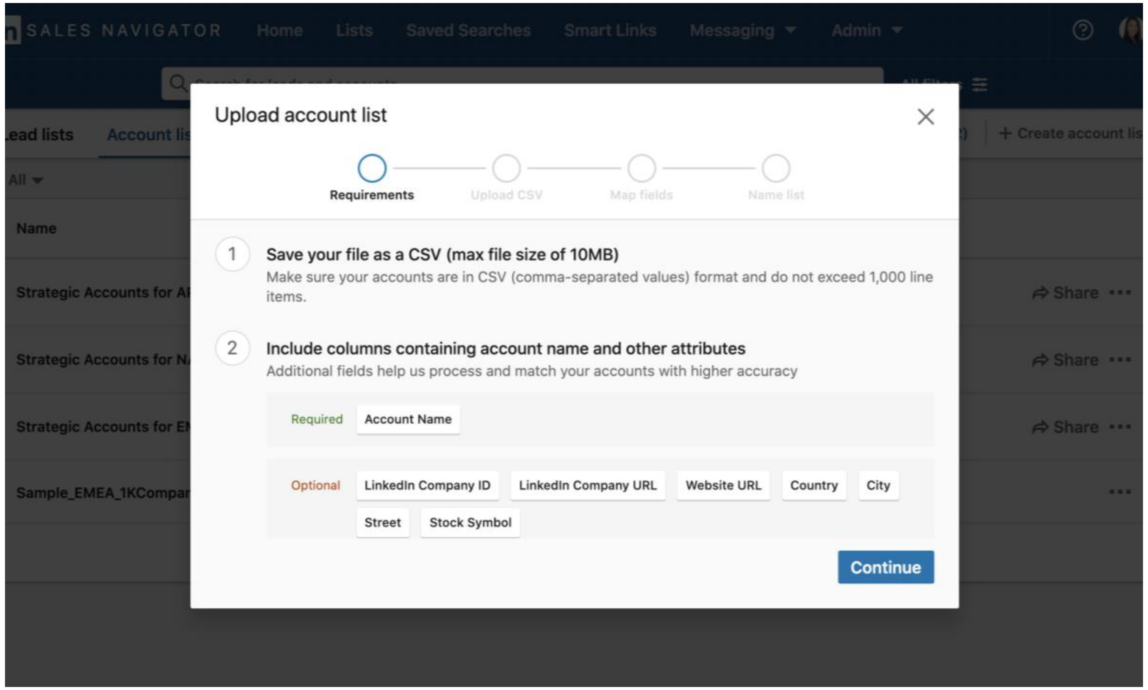
Upload CSV file of Accounts

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)



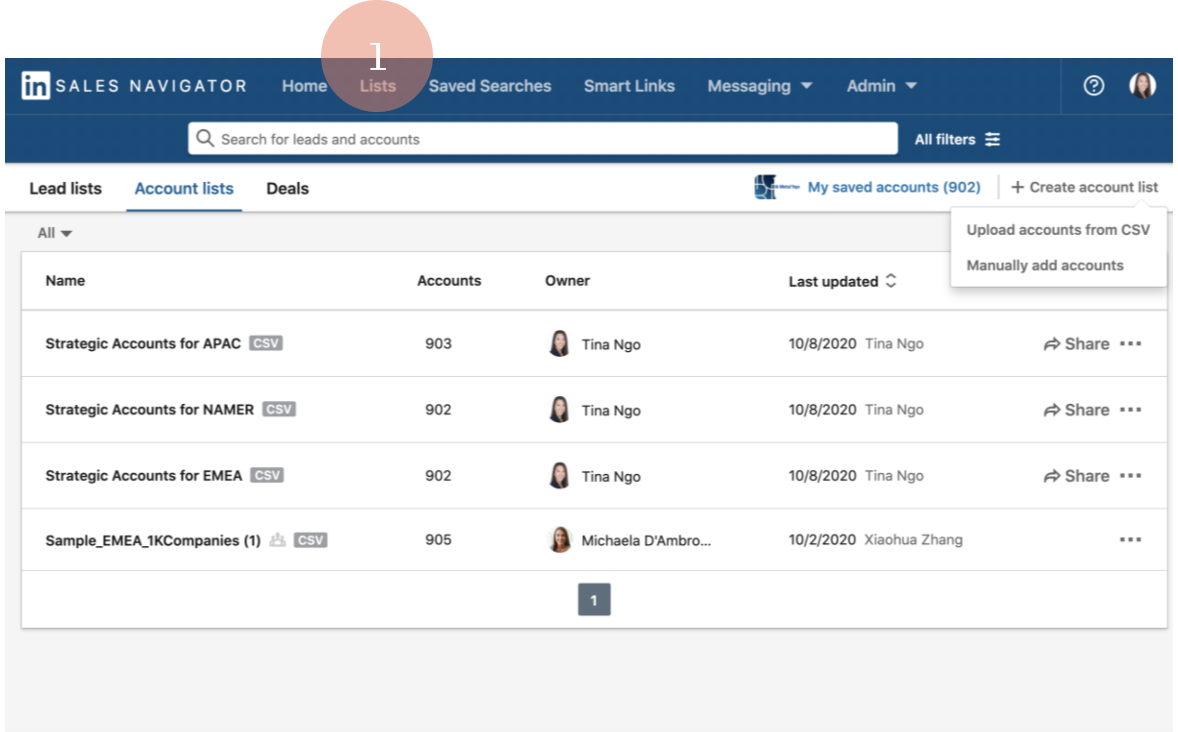
Reduce manual effort and save time by uploading a book of business

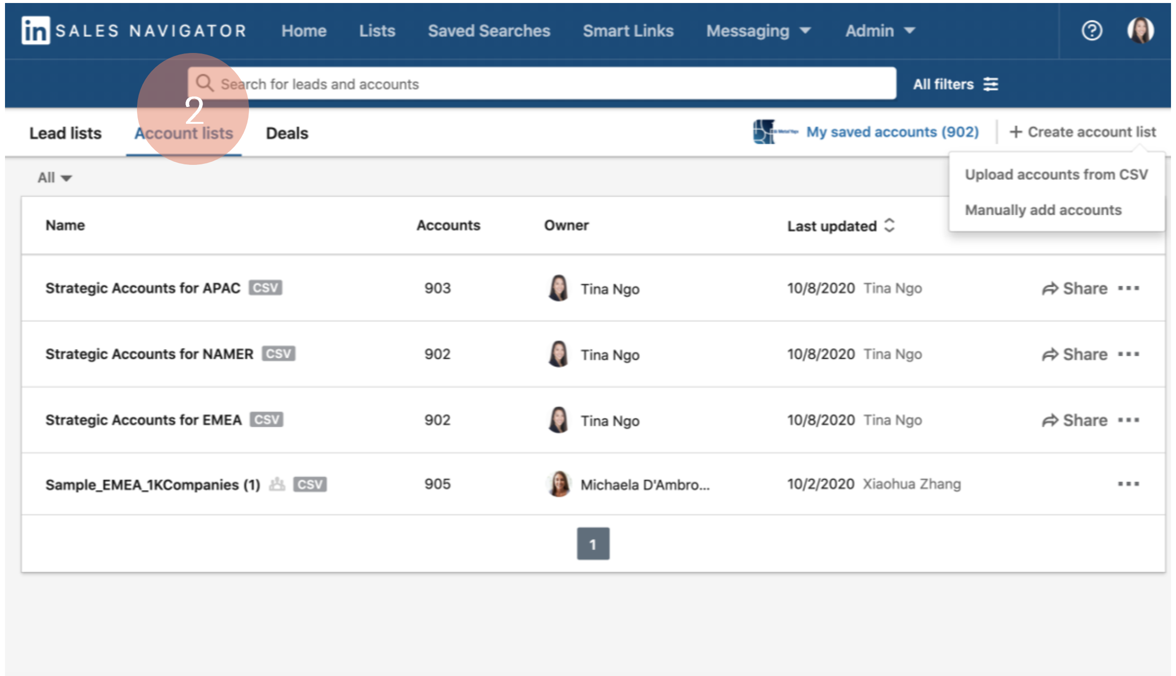
Users will be able to upload a CSV file of accounts to create an Account List.

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)





STEP 1

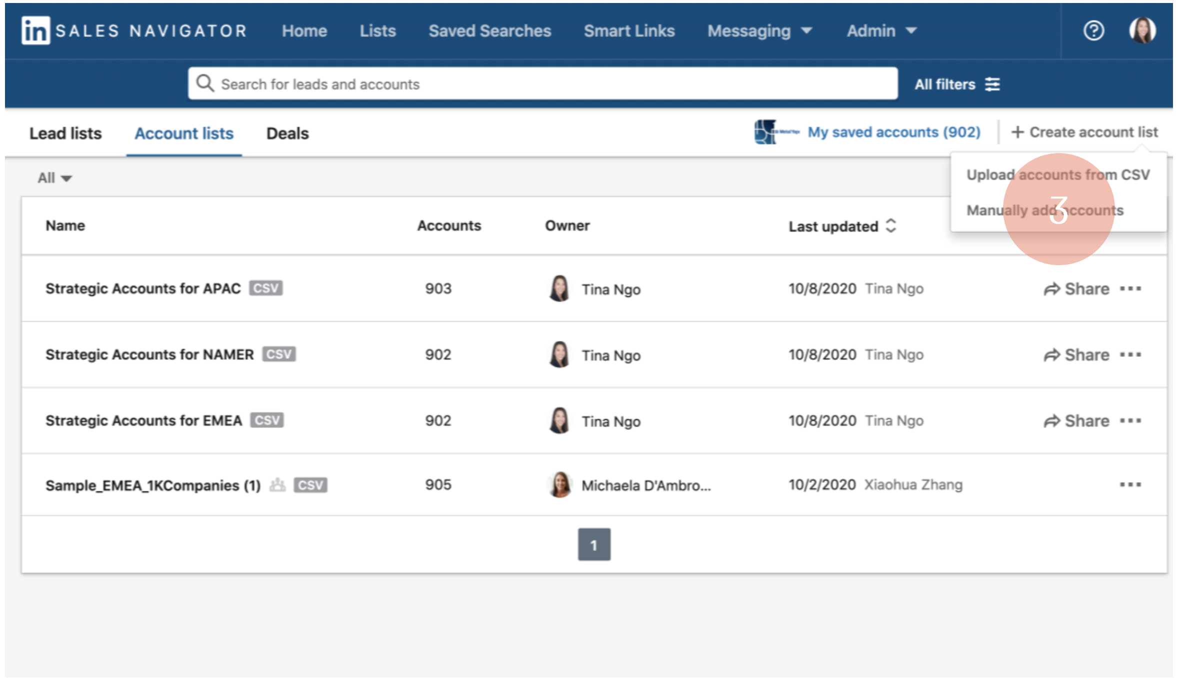
In Sales Navigator, select "Lists"

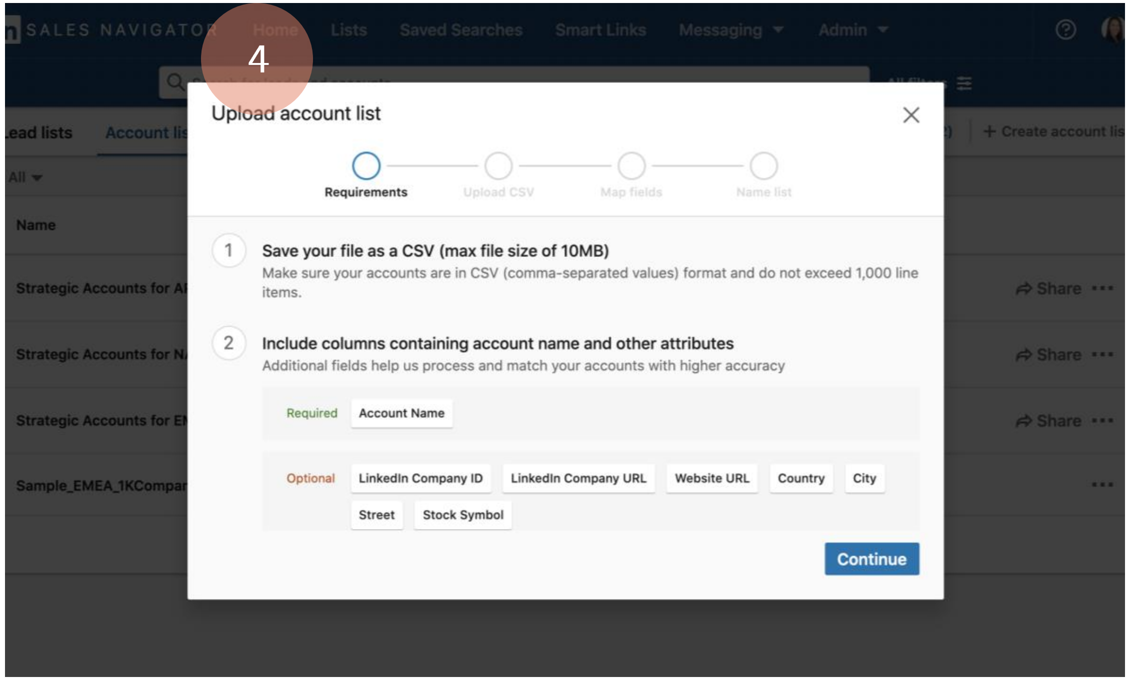
STEP 2

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

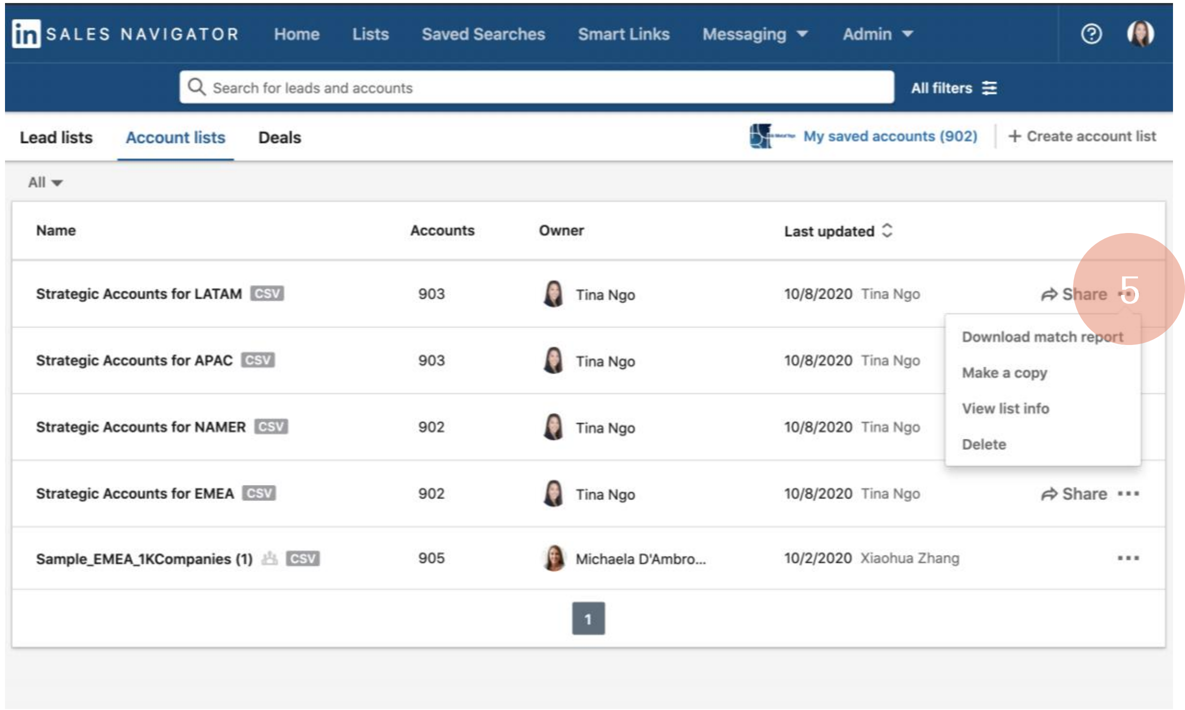
STEP 4

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)



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].

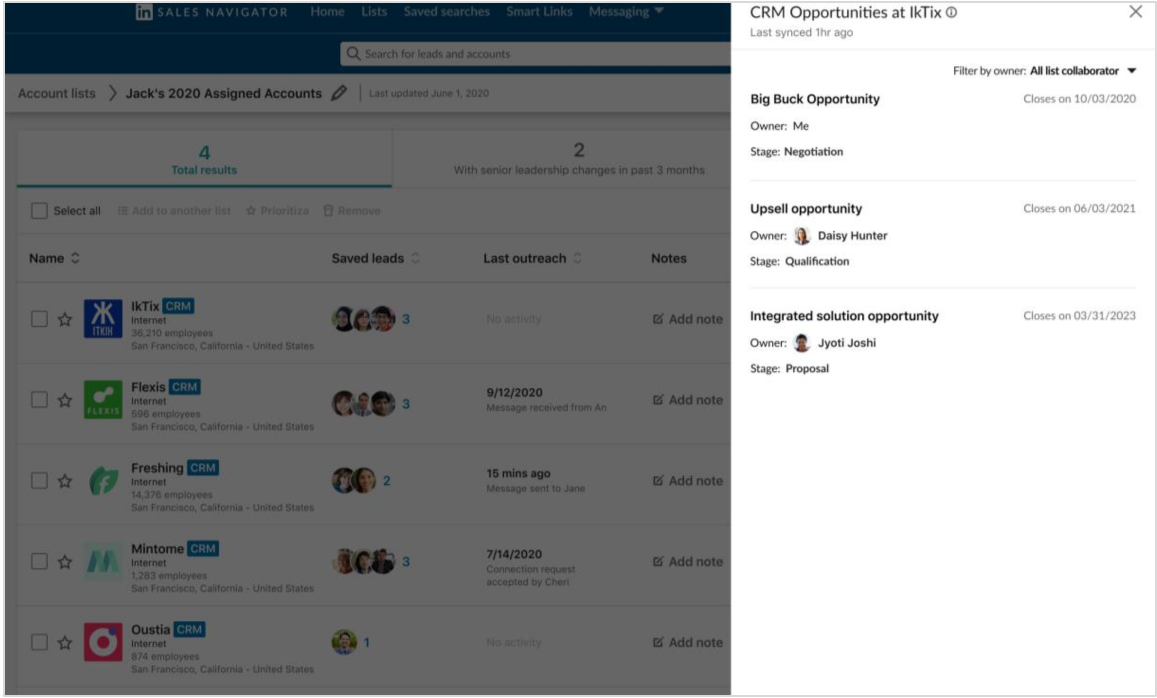
View CRM Opportunities

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)



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:

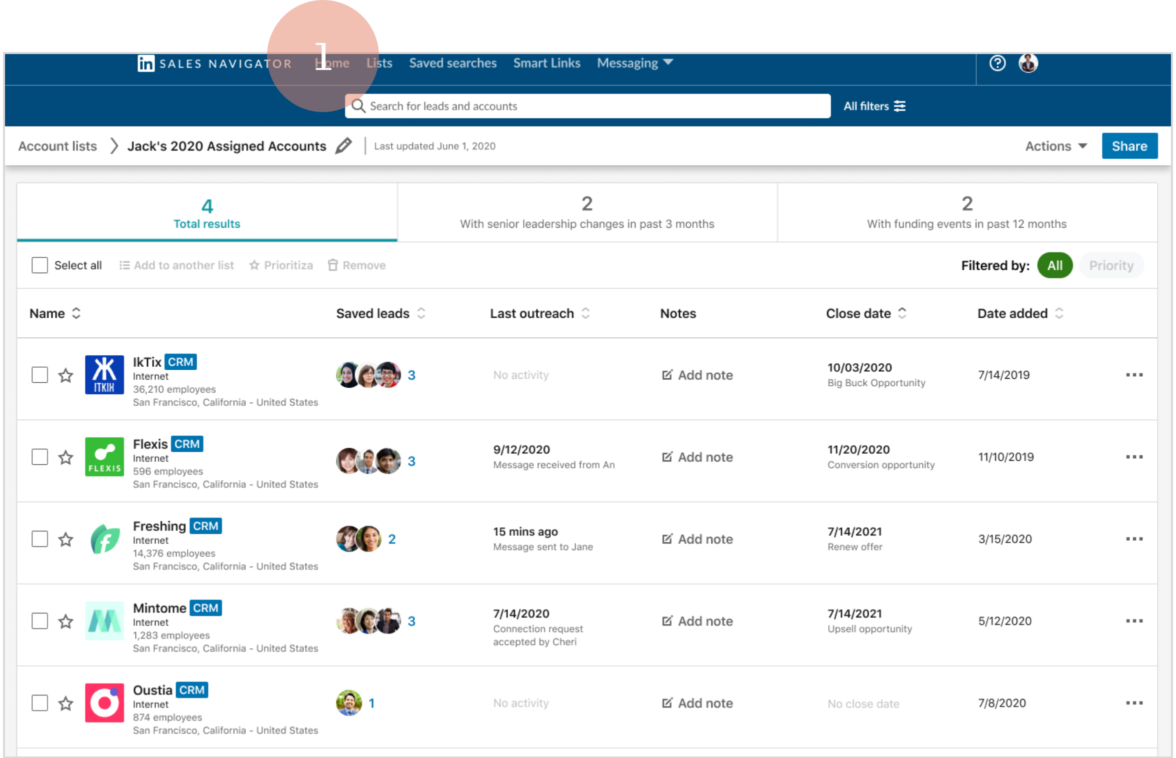
- Opportunity Owner
- Opportunity Name
- Opportunity Stage
- Close Date

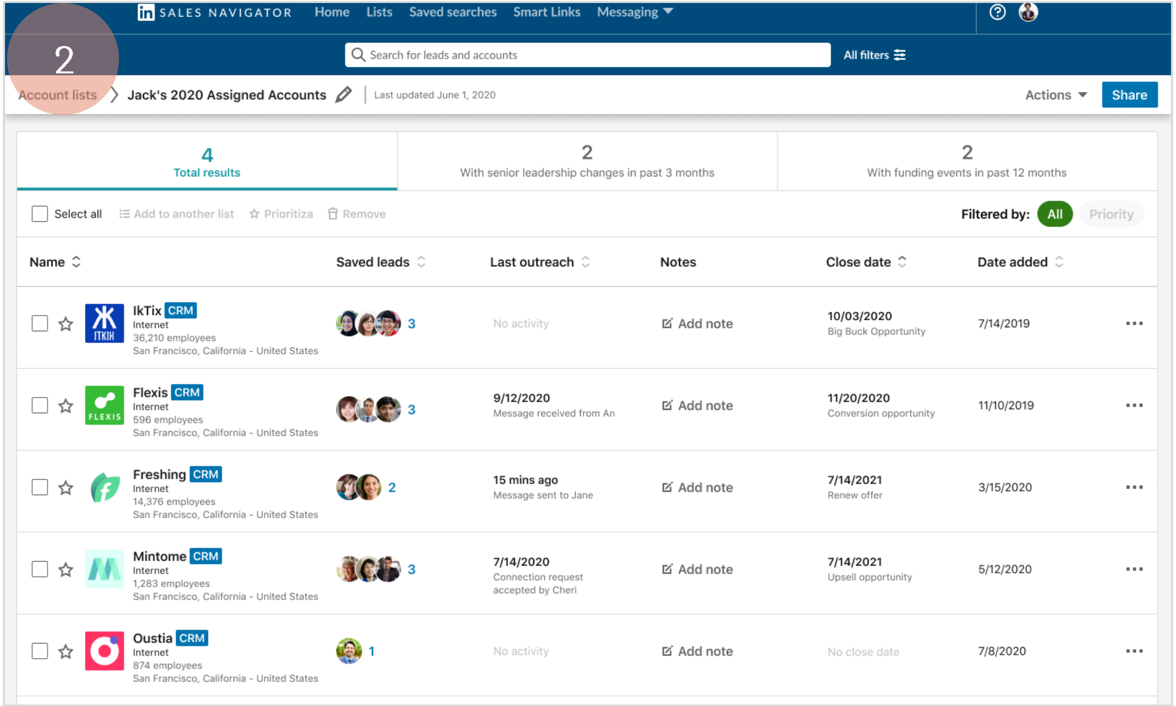
Users will also be able to filter by owner to understand which colleagues have worked or are working on a particular account to collaborate more effectively.

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)





STEP 1

In Sales Navigator, select **"Lists"**

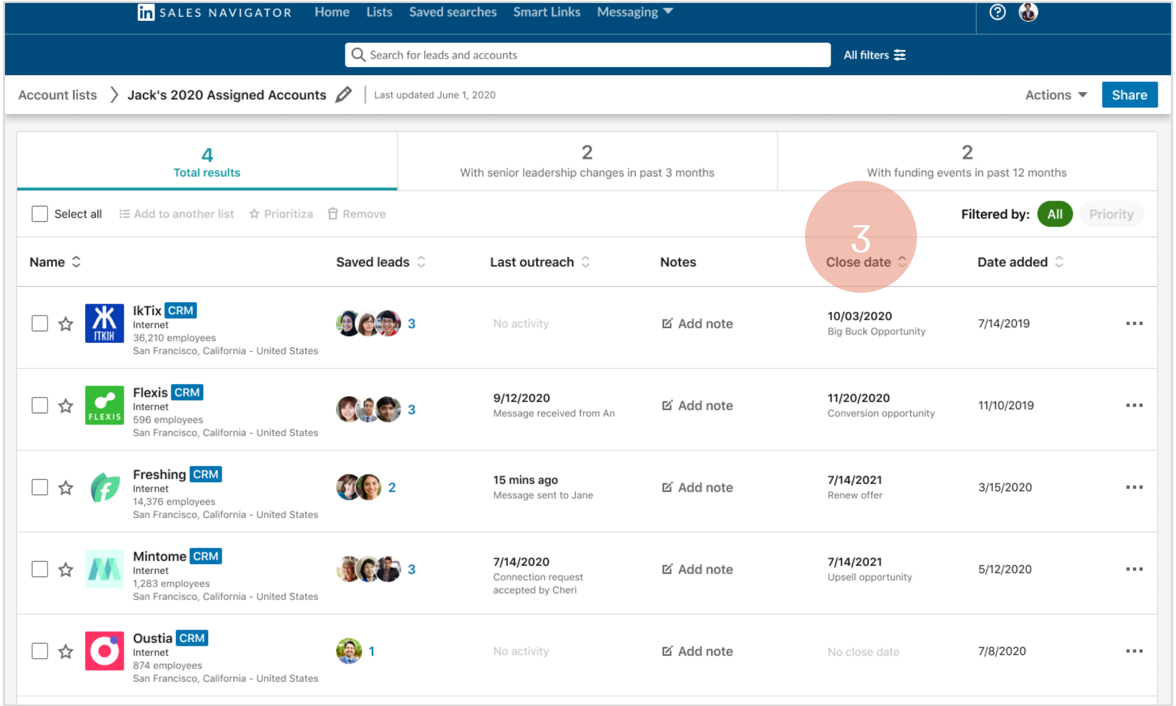
STEP 2

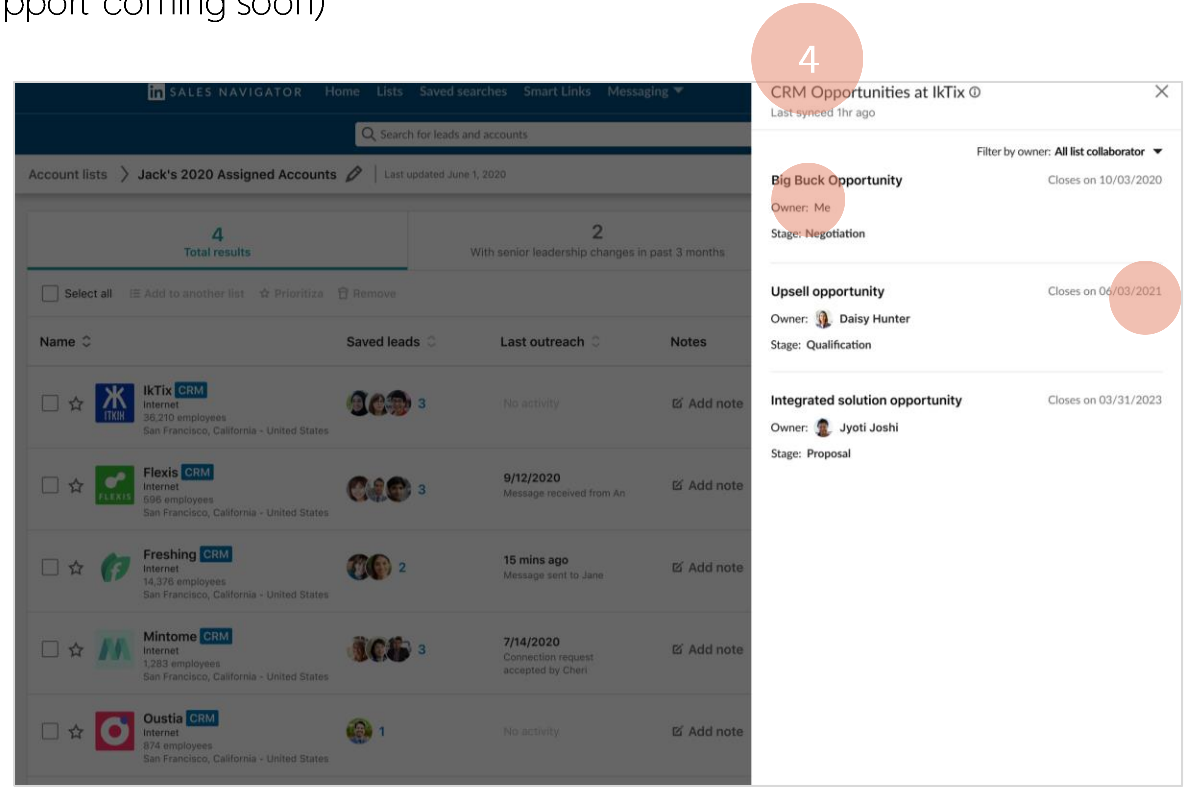
Select **"Account Lists"**, which is the Account Lists Hub

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)





STEP 3

An additional column **"Close date"** will appear with opportunity name and close date information

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

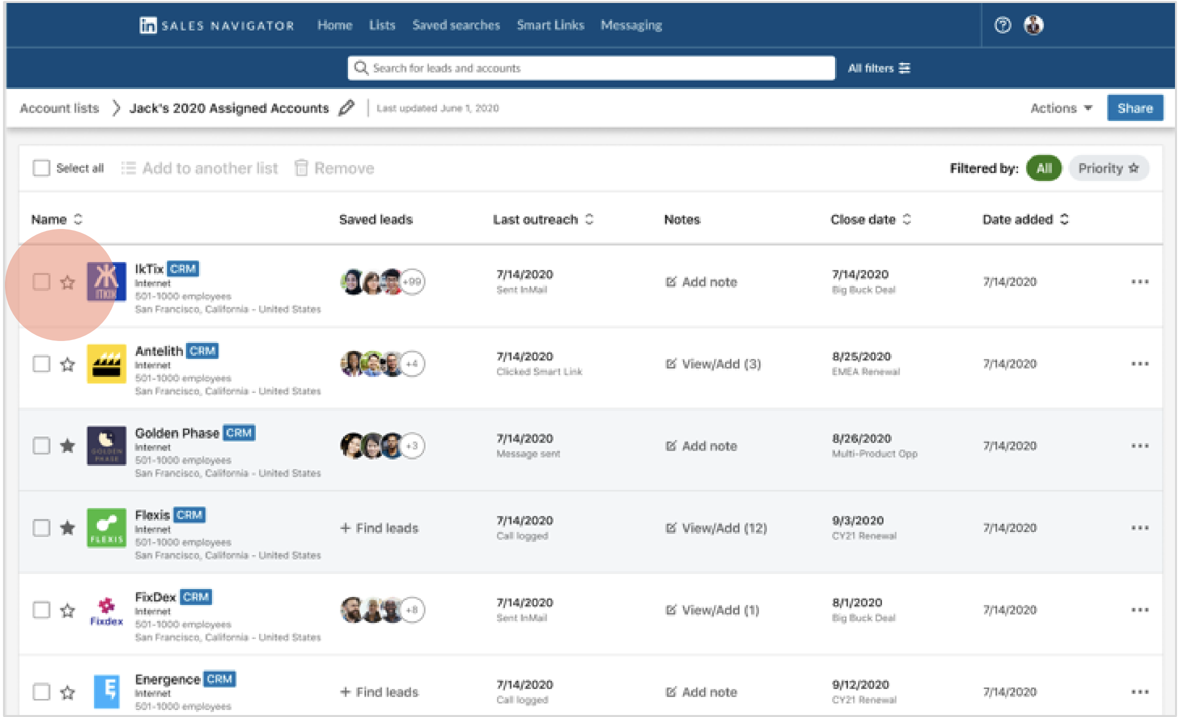
Manually prioritize Accounts

Details:
Manual Account Prioritization

Available to all Sales Navigator users

Manual Account Prioritization

Available to all Sales Navigator users



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

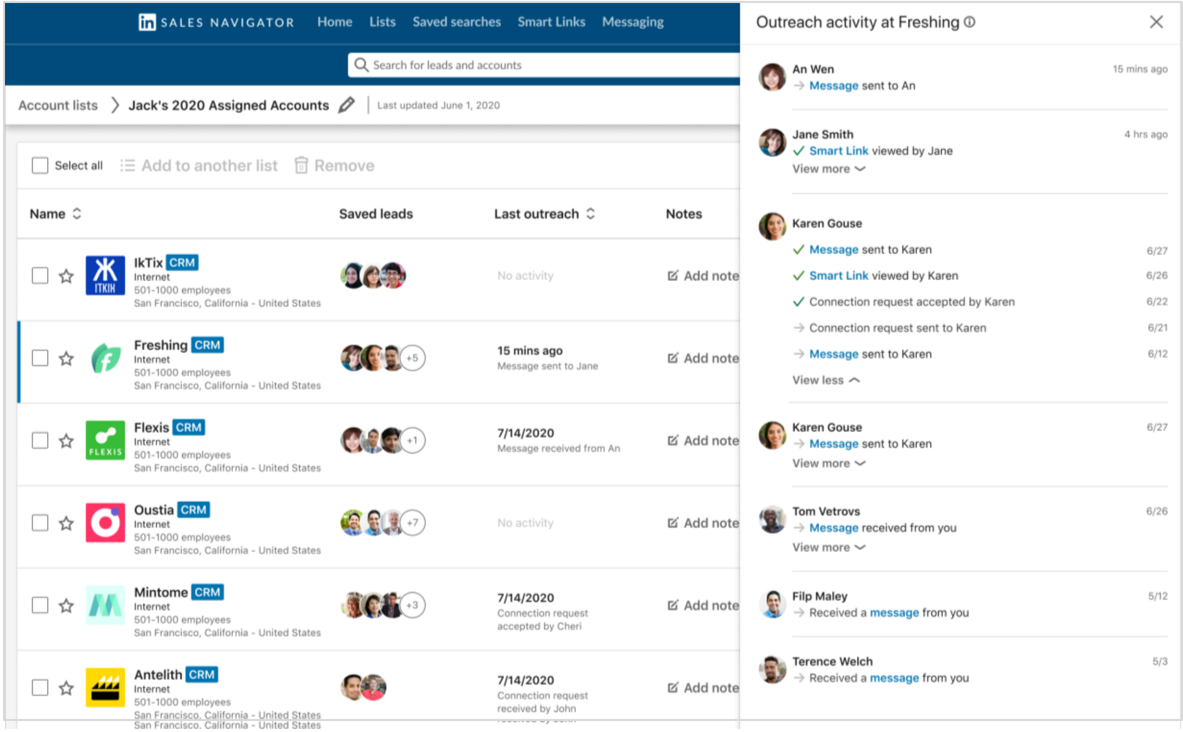
View LinkedIn Outreach Activities

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



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.

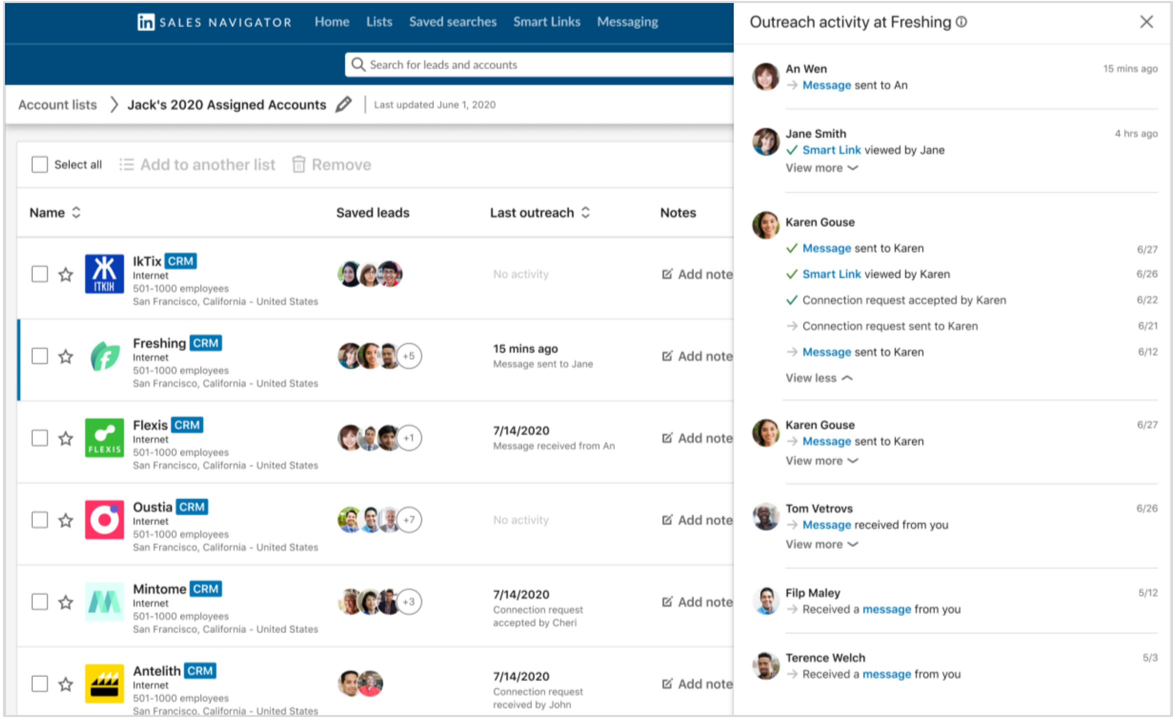
The information users will be shown includes:

- 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

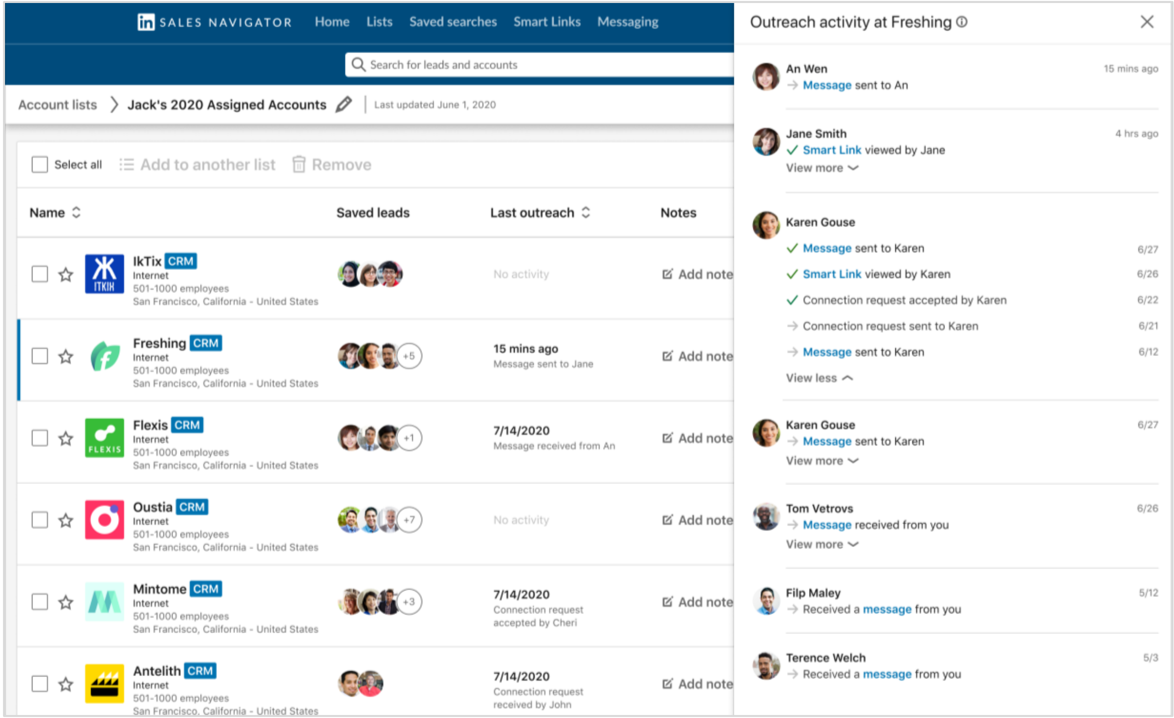
Please note: Some information may take up to 12 hours to update

How It Works: LinkedIn Outreach Activity in Account Lists

Available to all Sales Navigator users



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



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

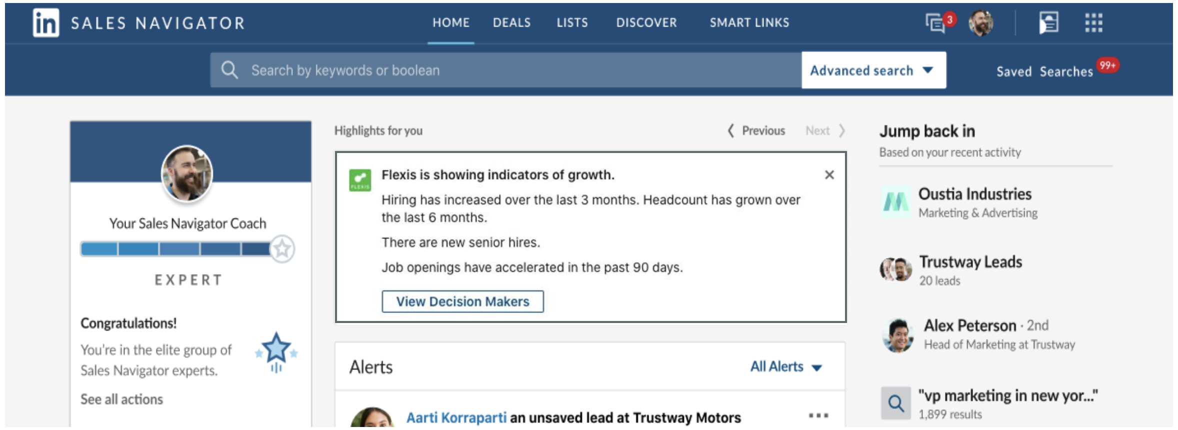
Community Idea

Homepage Enhancements & New Alerts

Available to all Sales Navigator users

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.

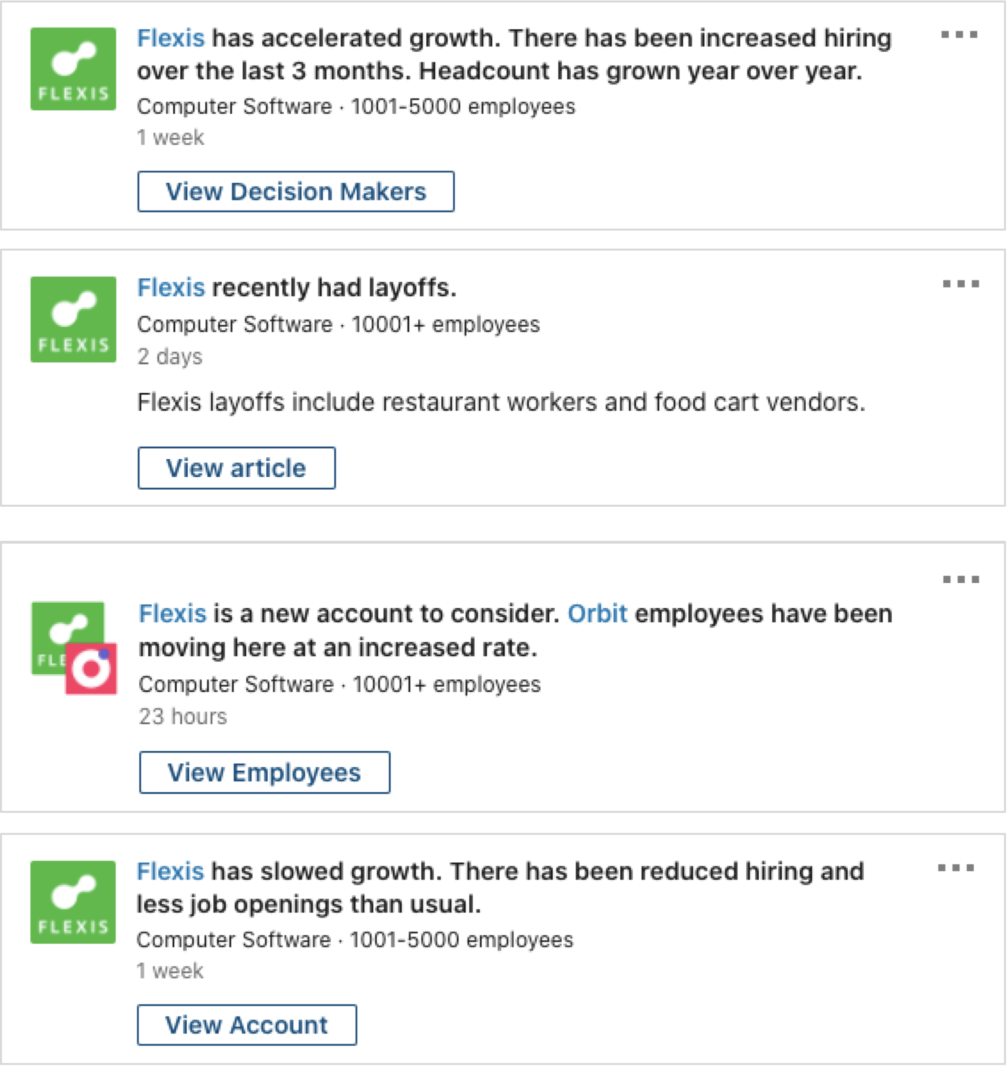
Users will see four types of Account Insights themes:

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



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.

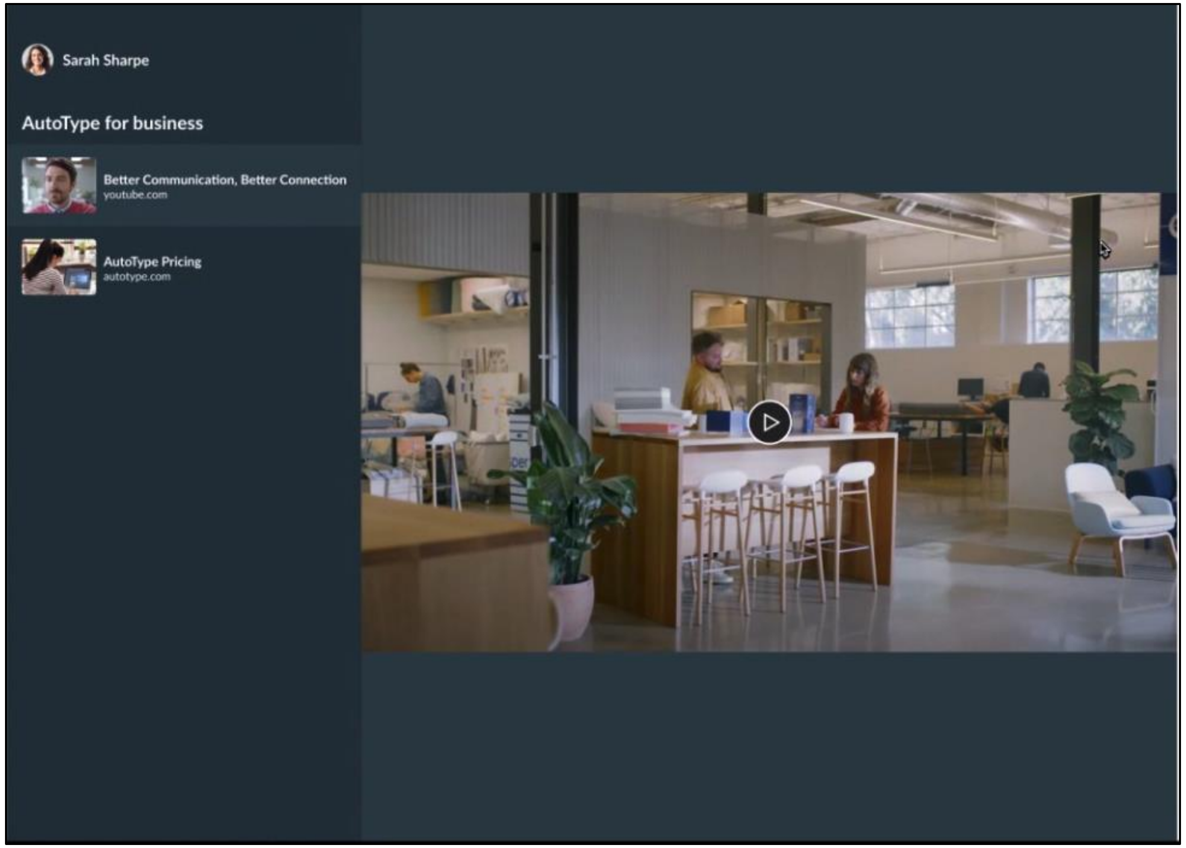
Community Idea

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:

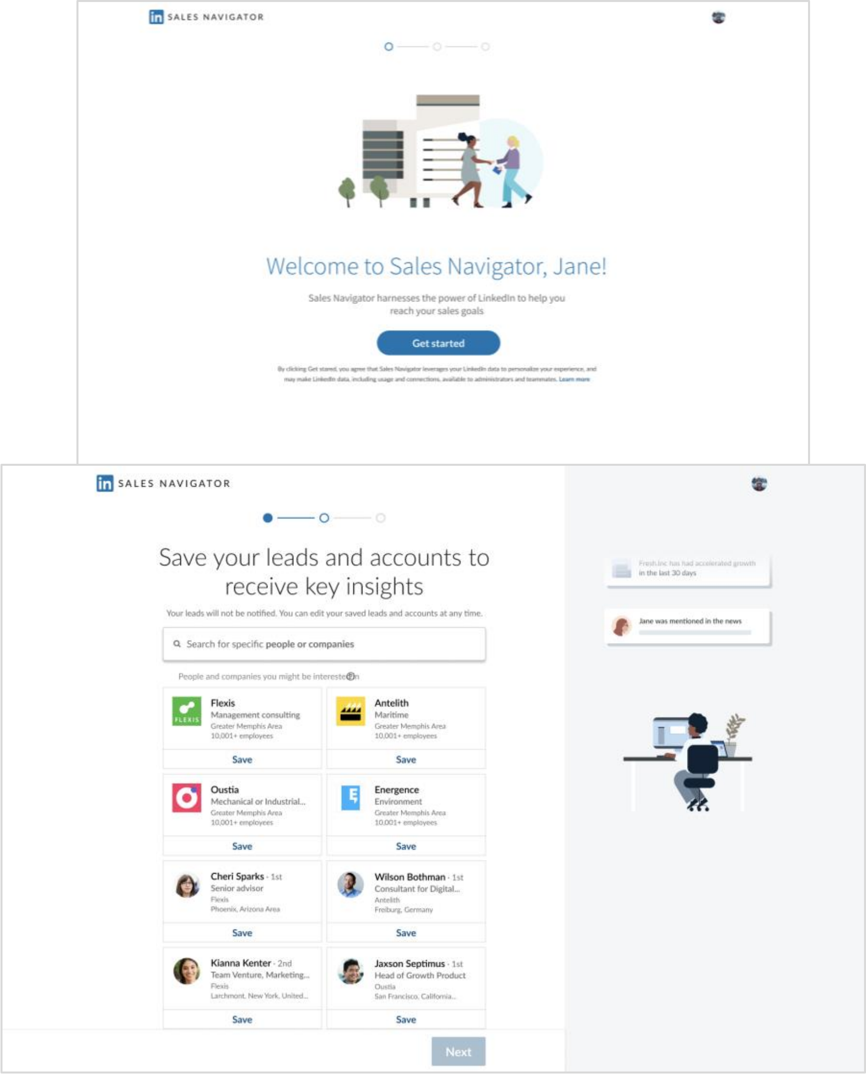
- Sales Navigator users will now be able to prevent Smart Links recipients from downloading the assets in a Smart Link.
- Users will also be able to change the title associated with the assets inside their Smart Link presentations.

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

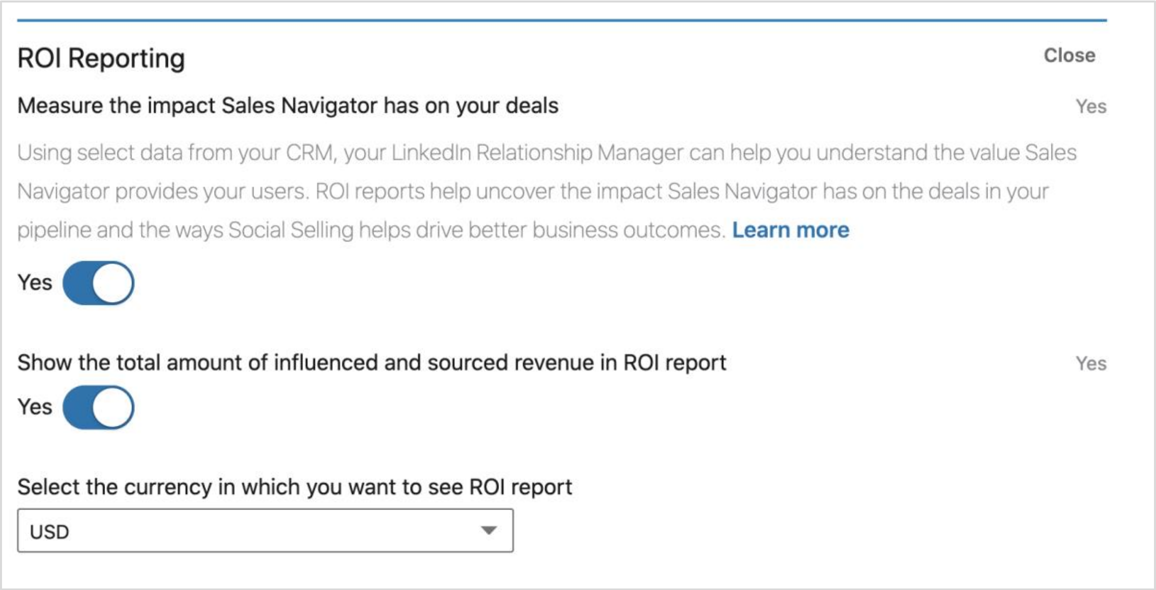
ROI Reporting helps customers demonstrate the value of their Sales Navigator program. As part of our update, we will provide three additional capabilities:

- 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



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 compete

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