LinkedIn

Sales Navigator Q4 '19 Release

Product Updates and New Features

Spotlight Feature: Data Validation

Plus:

USAGE REPORTING REFRESH

ANALYTICS INTEGRATION

FUNDING EVENTS SPOTLIGHT

LIST ENHANCEMENTS & PERMISSIONS

HOMEPAGE ENHANCEMENTS

Plus:

NEW ALERTS

BING GEO MIGRATION

LEAD SEARCH WITHIN LISTS

IMPROVEMENTS TO BEST-INTRO-PATH

SNAP PARTNERS

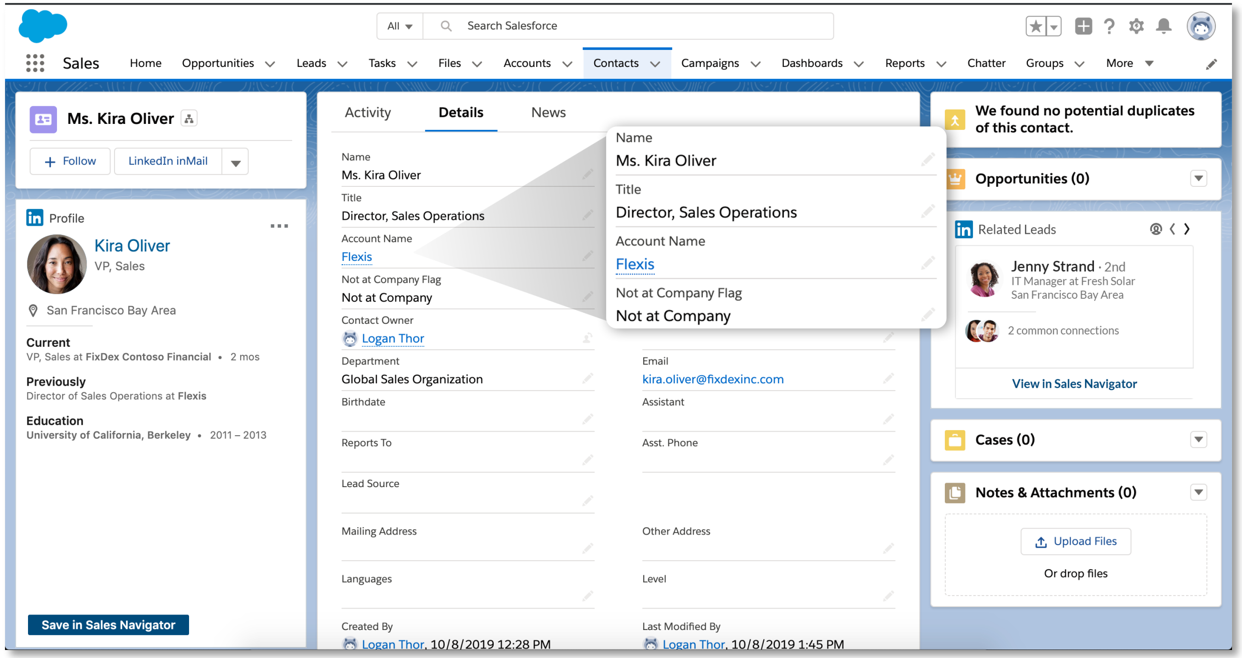
Data Validation

Bring the power of LinkedIn to your CRM by keeping it up-to-date

Note: This feature is only available for ***Sales Navigator Enterprise*** *edition customers*

What's new?

Data Validation



Overview

Data Validation is a set of capabilities that leverages the CRM Sync integration to validate information in CRM against the information that is LinkedIn. Comparing the two datasets and highlighting any discrepancies leaves the power to take action in your hands. The feature is launching first with a "Not at Company" flag.

Benefits

- **Drive sales effectiveness:** Identify deals at risk, or which deals should be prioritized due to buyer-side changes and insights
- **Increase rep efficiency:** Eliminate extra validation steps for reps so they can spend more active time selling
- **Improve organizational data quality:** Gain insight across the data quality of your organization and enable reps and managers to take action

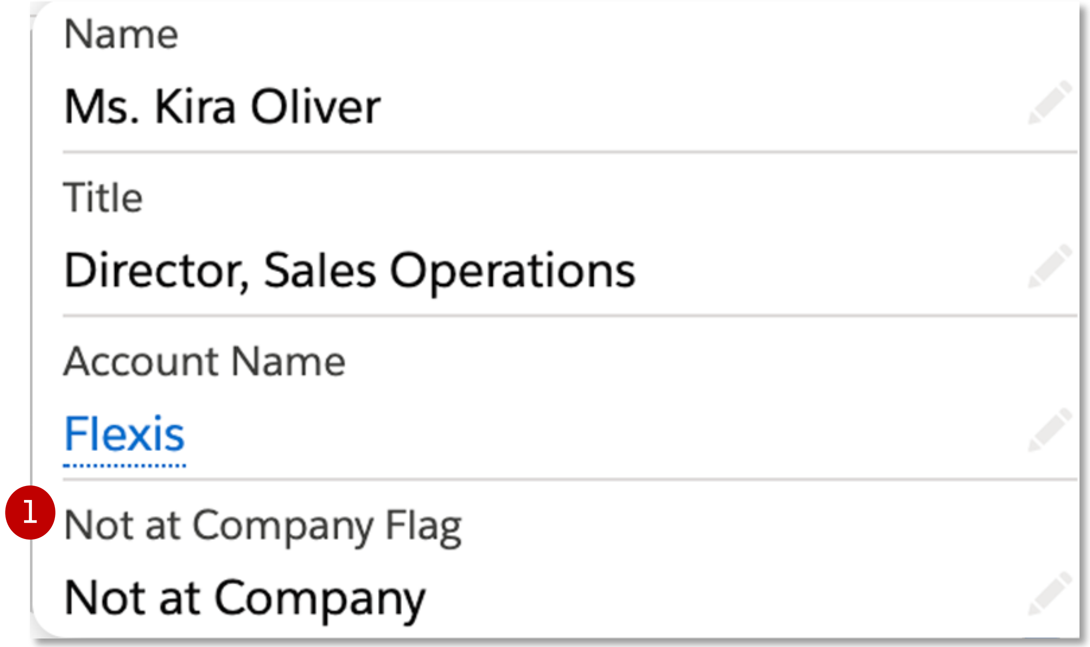
Data Validation Requirements

Data Validation requires:

- Sales Navigator **Enterprise** Edition subscription
- CRM Sync to be enabled
- A CRM Admin + Sales Navigator Admin for enablement

What's new?

"Not at Company Flag" Field



1. Within CRM, a new custom field will be created: "Not at Company Flag"

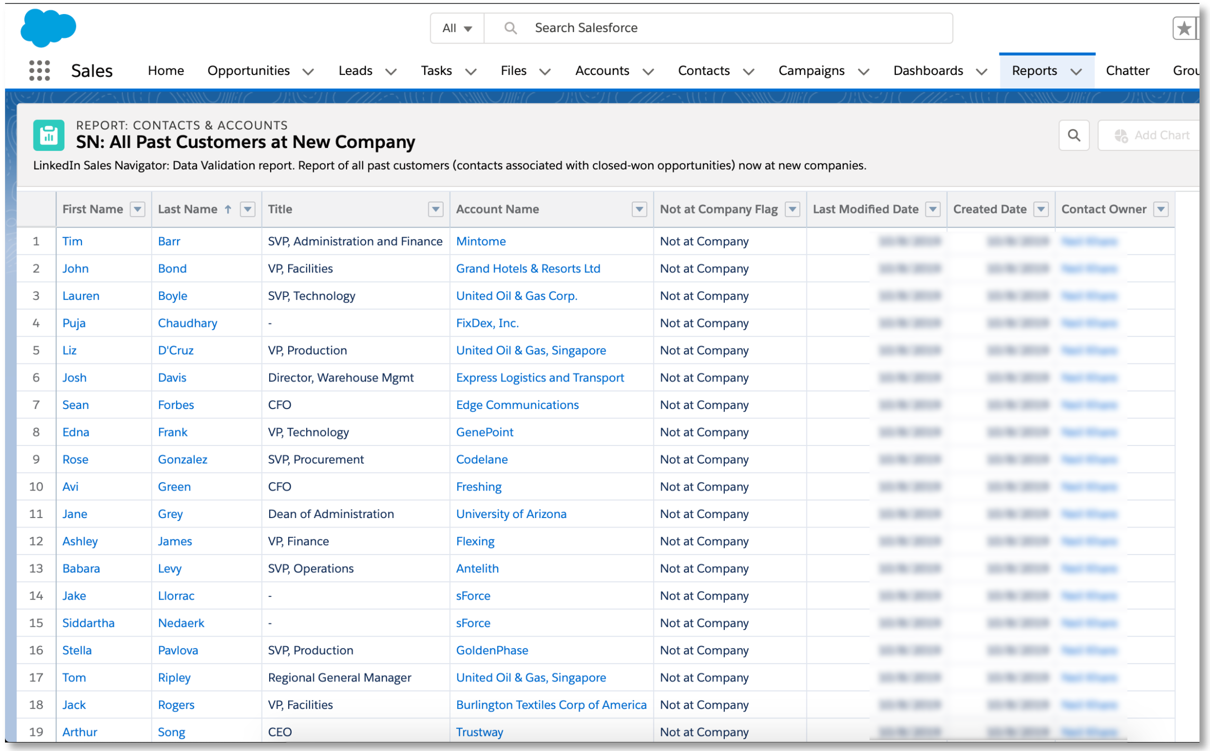
- LinkedIn will attempt to validate every CRM contact record that is:
  - Owned by a Sync'ing Sales Navigator user
  - Associated with an Opportunity or Account owned by a Sync'ing Sales Navigator user

- When LinkedIn determines that a CRM contact is no longer with their CRM account, it will return a "Not At Company" value

- CRM Administrators can use this field to create new reports or incorporate into existing dashboards or views

What's New?

Out-of-the-box CRM Reports & System Views



	First Name	Last Name	Title	Account Name	Not at Company Flag	Last Modified Date	Created Date	Contact Owner
1	Tim	Barr	SVP, Administration and Finance	Mintome	Not at Company	[illegible]	[illegible]	[illegible]
2	John	Bond	VP, Facilities	Grand Hotels & Resorts Ltd	Not at Company	[illegible]	[illegible]	[illegible]
3	Lauren	Boyle	SVP, Technology	United Oil & Gas Corp.	Not at Company	[illegible]	[illegible]	[illegible]
4	Puja	Chaudhary	-	FixDex, Inc.	Not at Company	[illegible]	[illegible]	[illegible]
5	Liz	D'Cruz	VP, Production	United Oil & Gas, Singapore	Not at Company	[illegible]	[illegible]	[illegible]
6	Josh	Davis	Director, Warehouse Mgmt	Express Logistics and Transport	Not at Company	[illegible]	[illegible]	[illegible]
7	Sean	Forbes	CFO	Edge Communications	Not at Company	[illegible]	[illegible]	[illegible]
8	Edna	Frank	VP, Technology	GenePoint	Not at Company	[illegible]	[illegible]	[illegible]
9	Rose	Gonzalez	SVP, Procurement	Codelane	Not at Company	[illegible]	[illegible]	[illegible]
10	Avi	Green	CFO	Freshing	Not at Company	[illegible]	[illegible]	[illegible]
11	Jane	Grey	Dean of Administration	University of Arizona	Not at Company	[illegible]	[illegible]	[illegible]
12	Ashley	James	VP, Finance	Flexing	Not at Company	[illegible]	[illegible]	[illegible]
13	Babara	Levy	SVP, Operations	Antelith	Not at Company	[illegible]	[illegible]	[illegible]
14	Jake	Llorrac	-	sForce	Not at Company	[illegible]	[illegible]	[illegible]
15	Siddartha	Nedaerk	-	sForce	Not at Company	[illegible]	[illegible]	[illegible]
16	Stella	Pavlova	SVP, Production	GoldenPhase	Not at Company	[illegible]	[illegible]	[illegible]
17	Tom	Ripley	Regional General Manager	United Oil & Gas, Singapore	Not at Company	[illegible]	[illegible]	[illegible]
18	Jack	Rogers	VP, Facilities	Burlington Textiles Corp of America	Not at Company	[illegible]	[illegible]	[illegible]
19	Arthur	Song	CEO	Trustway	Not at Company	[illegible]	[illegible]	[illegible]

Salesforce Report: All Past Customers at New Company

Enabling Data Validation will provide users with out-of-the-box reports or system views.

These reports or views will help identify:

- **Deals at Risk:** Proactively identifying when a buyer has left an open opportunity
- **Past Customers at New Company:** Identifying opportunities when customers (potential champions) have joined new companies
- **All Flagged Contacts:** Identifying all potential out-of-date contacts

For each CRM, naming and location of capabilities will vary slightly. Refer to upcoming enablement guide for more.

- **Salesforce:** Can be found within "Reports"
- **Dynamics 365 for Sales:** Can be found within Opportunity and Contact "System Views"

How it works

Enabling Data Validation

	Dynamics 365	Salesforce
Step 1	Open up any Unified Interface app, select "Open Org Chart" on Account form, and click "Enable Data Validation" feature	Upgrade to latest Sales Navigator for Salesforce app package via AppExchange)

Step 2 Toggle on Data Validation within Sales Navigator Admin Settings

Enable Data Validation? No

Data Validation enables LinkedIn Sales Navigator to review your CRM Contacts to let you know when the related CRM Account is different than the current company he or she has listed on the matched LinkedIn profile. By leveraging reporting in your CRM, you can then take action to lower any associated risk on open opportunities or engage with brand advocates that have moved to another company.

No

How it Works

Data Validation

1 Sync Matching

2 Company Validation

3 CRM “Not at Company” Field Updated

Via CRM Sync, LinkedIn attempts to match[1]:

- CRM Contact ⇔ LinkedIn Member Profile
- CRM Account (associated with Contact) ⇔ LinkedIn Company Profile

For successful matches:

- Validate that CRM Account information matches with information on LinkedIn Member Profile

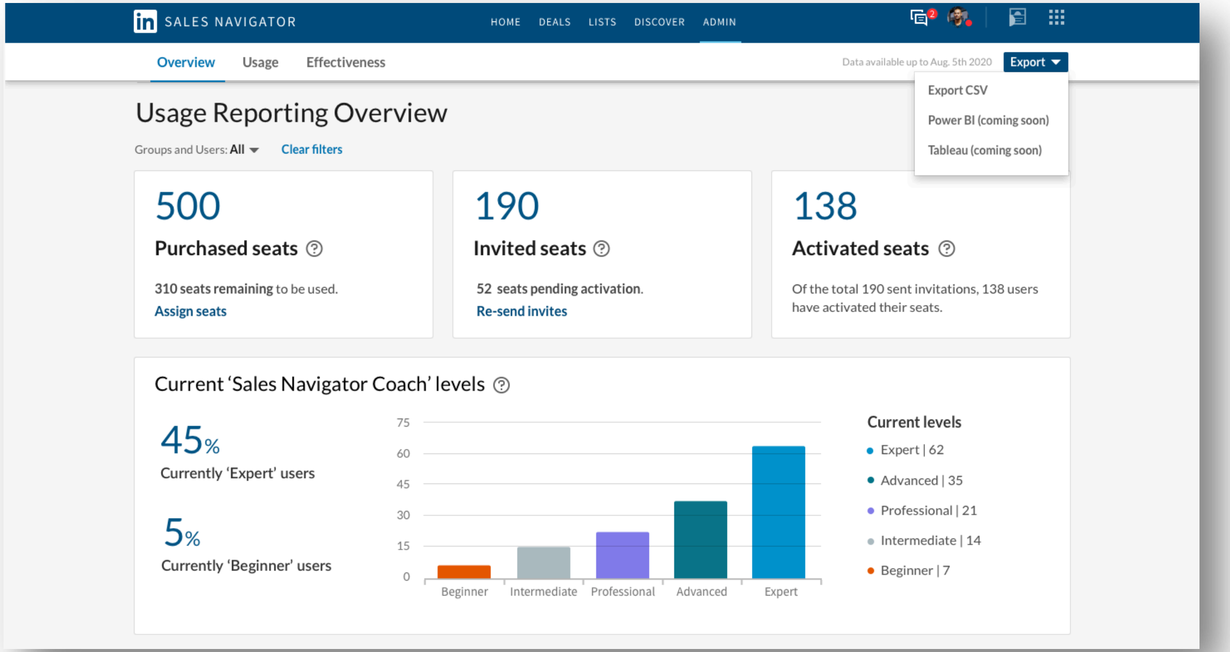
Sales Navigator returns one of two values to new Contact field:

- “Not At Company”: Contact not associated with Account
- <null> (SFDC) or “No feedback” (Dynamics 365) : No match OR no change to company

[1] *For more information on how Sync Matching occurs, [visit the LinkedIn Sales Navigator Help Center]*

Usage Reporting Refresh

What's new?
Usage Reporting Refresh new features



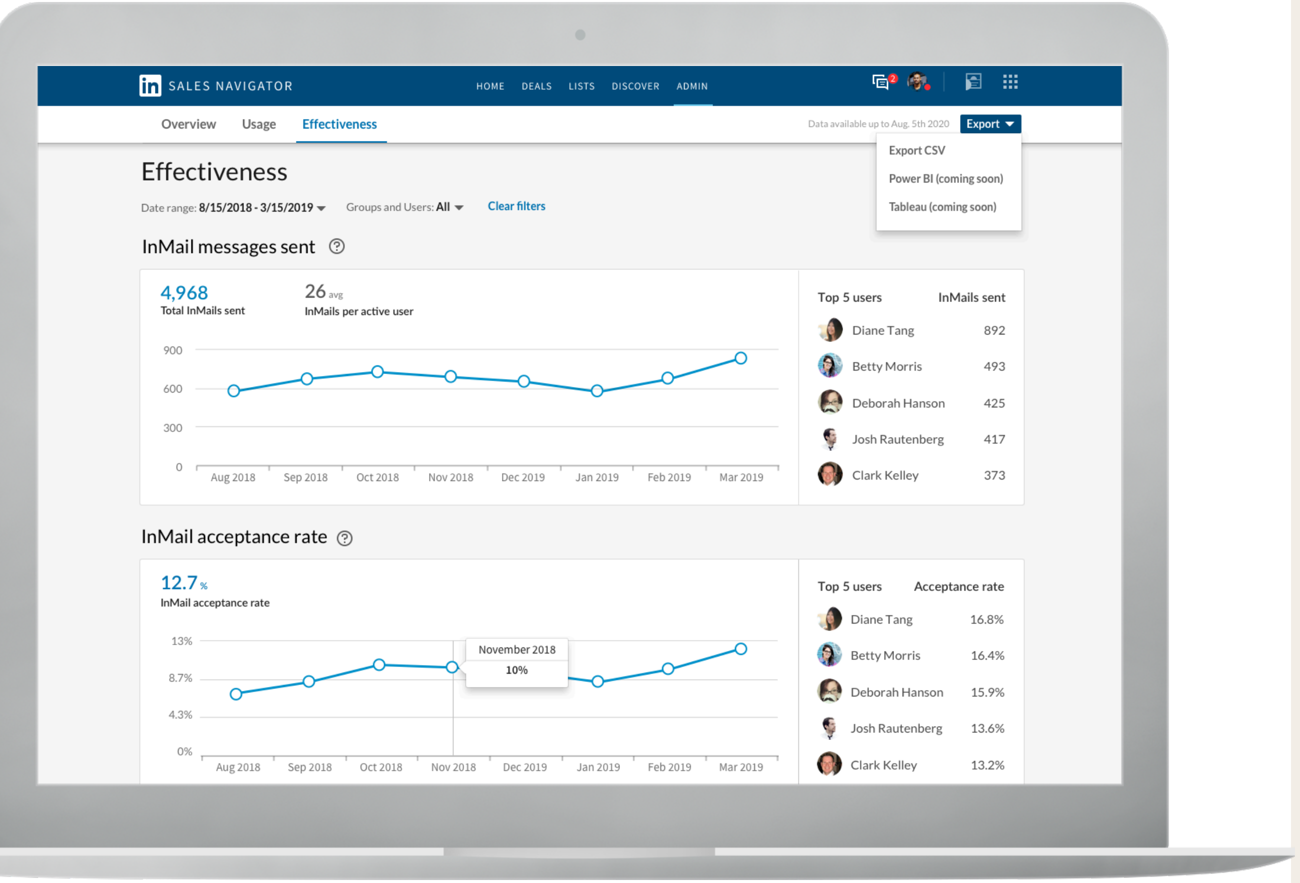
Usage Reporting is getting a new UI and metrics to improve admin experience, rep effectiveness, and to introduce a connected platform.

Key additions:

- 3-tab navigation:
  - **Overview:** Seat and Coach Level distribution
  - **Usage:** Basic activity analytics
  - **Effectiveness:** Selling-based activity analytics
- New metrics:
  - **In Reporting:** InMail Acceptance Rate
  - **In CSV export:** Coach Level + InMail Acceptance Rate
- 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



Product Objective: Increase SN usage + adoption, decrease churn

GTM Goal: Increase Usage Reporting adoption

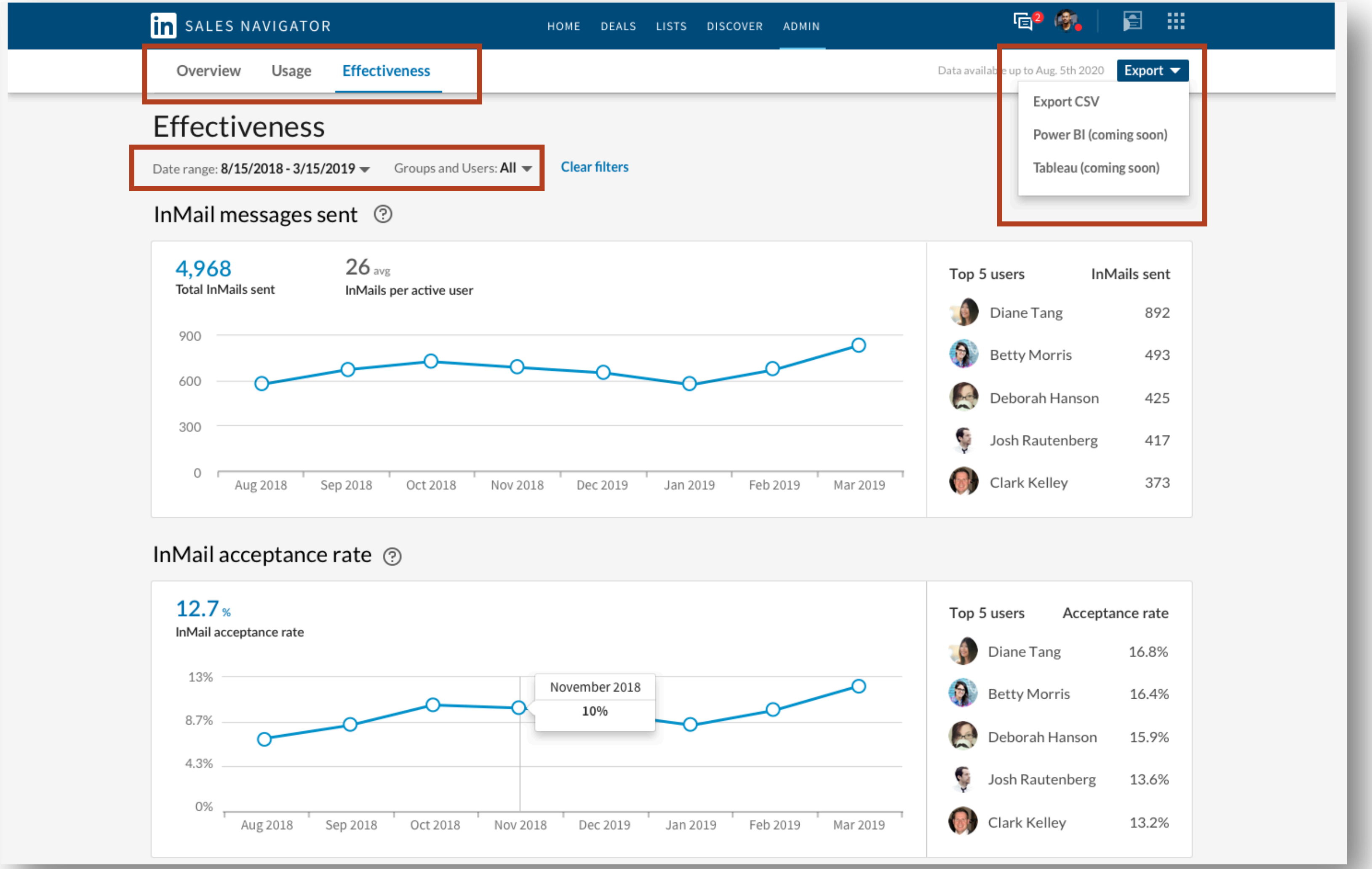
Who will gain access: ENT SKU only to start and no additional actions required to turn on

Value Props:

- 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
- Streamline rep management
  - Connect Usage Reporting to business intelligence tools to streamline rep management and measurement

What's new?

Usage Reporting Refresh navigation, filters, and CSV export options

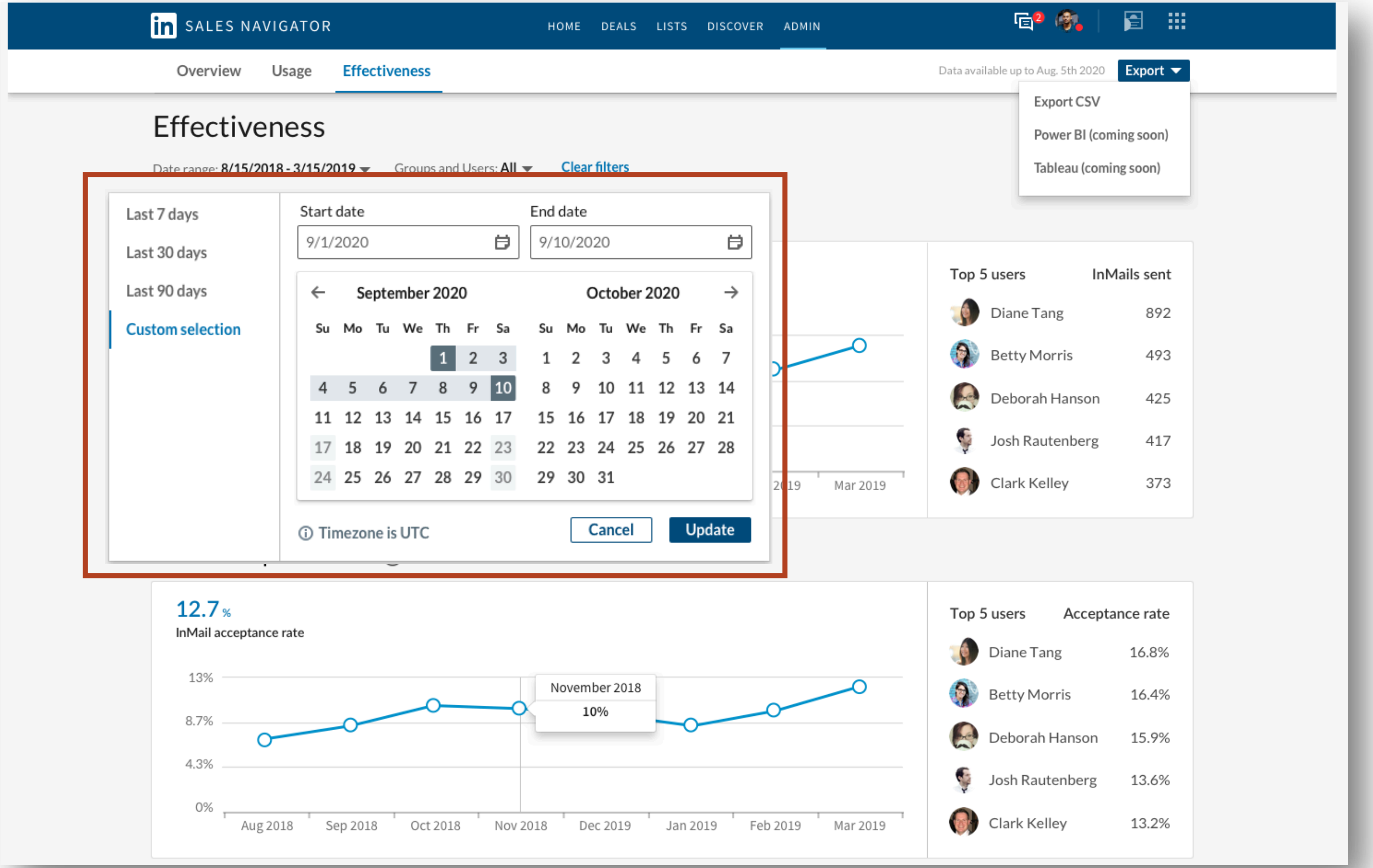


<u>Improved organization and increased flexibility:</u>

- 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

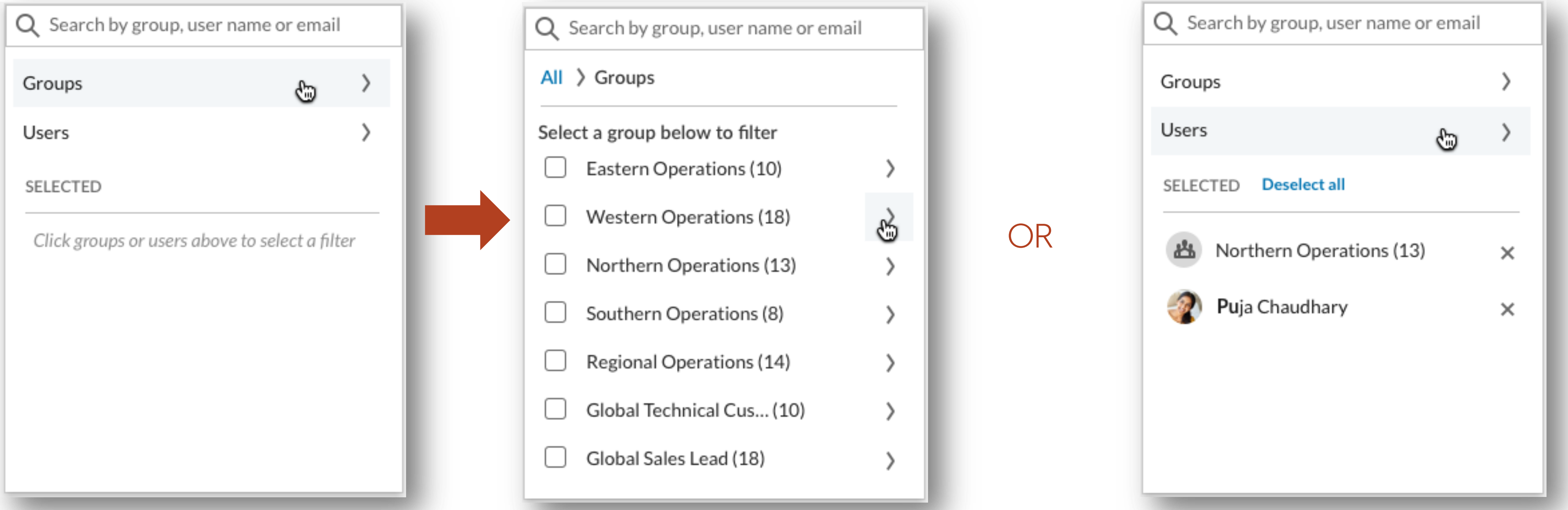


<u>Improved date range customization:</u>

•New custom + set date range capabilities

What's new?

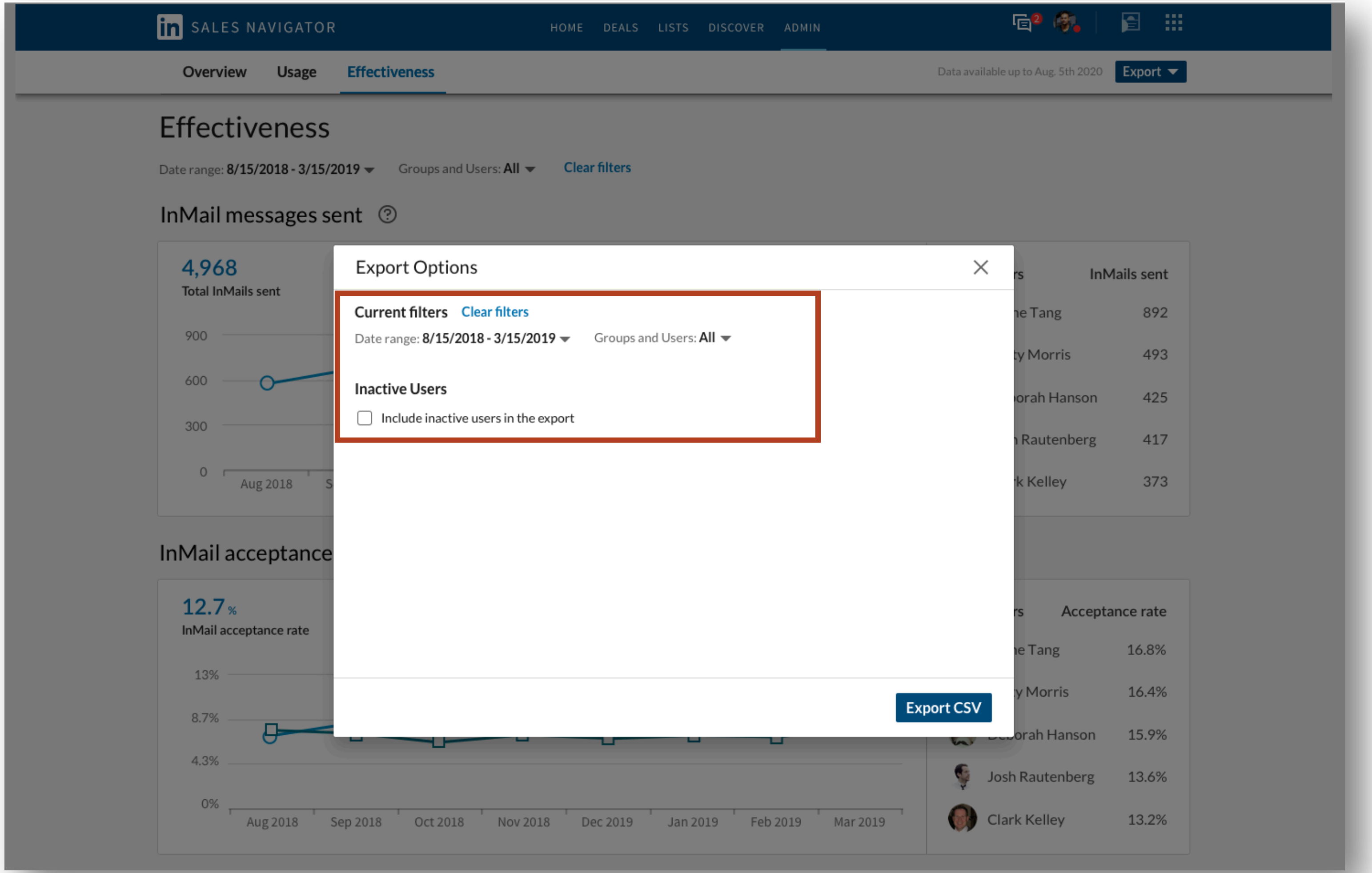
Usage Reporting Refresh new filters detail



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

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

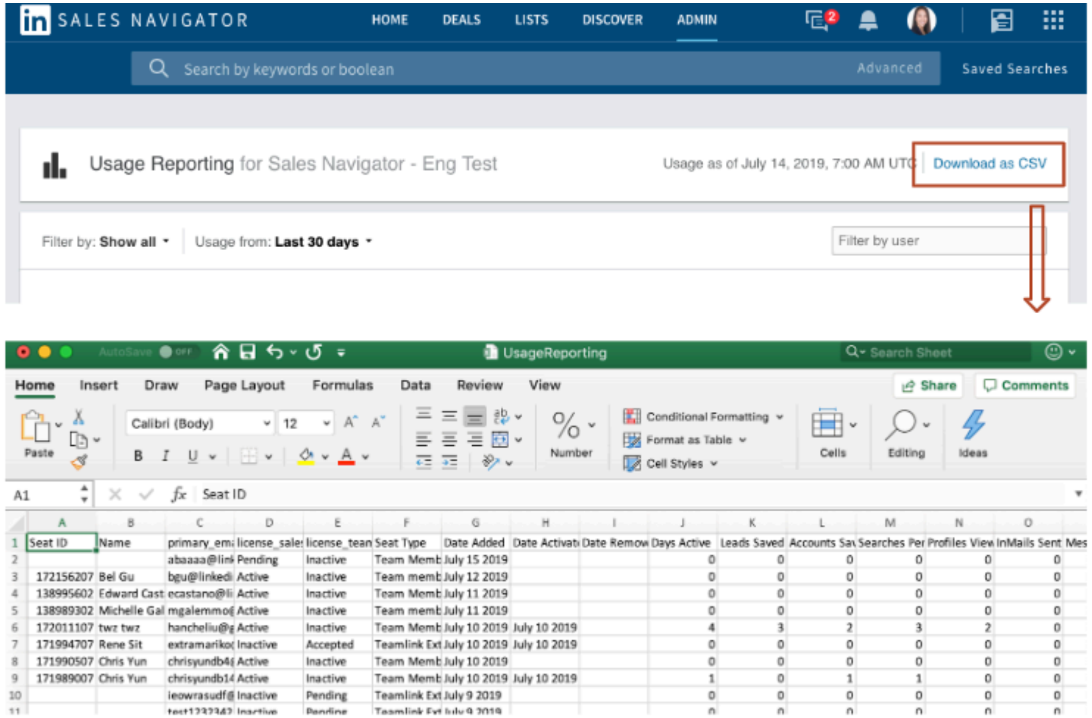
Analytics Integrations

Integrations with Tableau and Power BI

Note: This feature is only available for ***Sales Navigator Enterprise*** *edition customers*

What's changing?

Analytics Integrations



Old way:

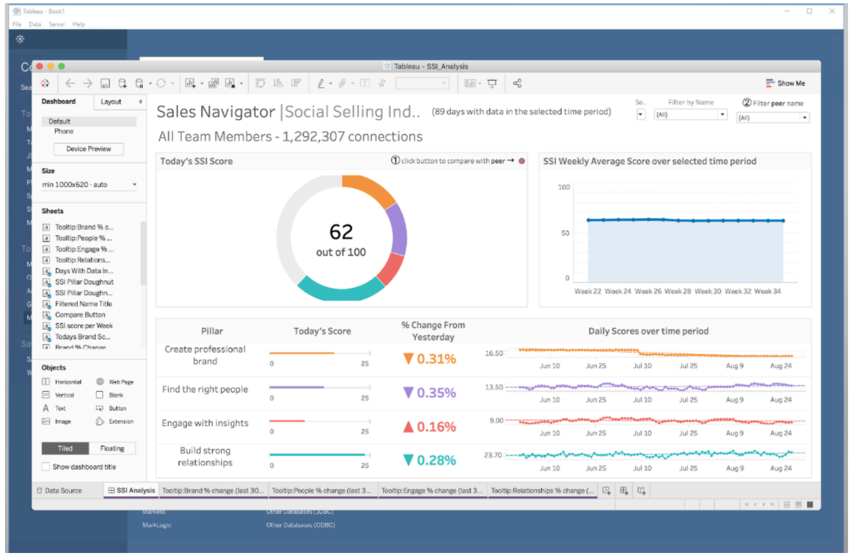
Users would manually download Sales Navigator usage data via CSV files

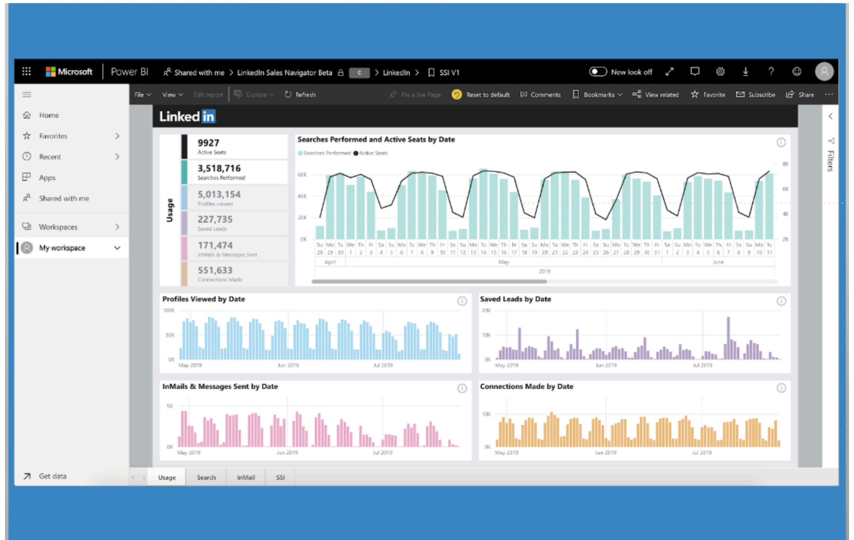
New, improved way:

Users can now seamlessly view Sales Navigator usage data within their own business intelligence tool (Tableau or Power BI)

What’s new?

Analytics Integration





Launching **Analytics Integrations** with Tableau and Power BI, two new Business Intelligence partners in SNAP.

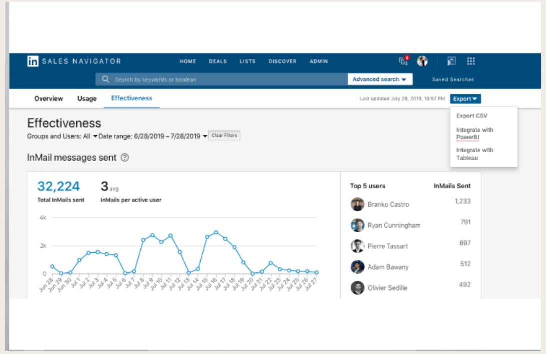
Overview:
The integration allows sales teams to better analyze and visualize Sales Navigator usage data in one view, delivering insights to enable fast, informed decisions

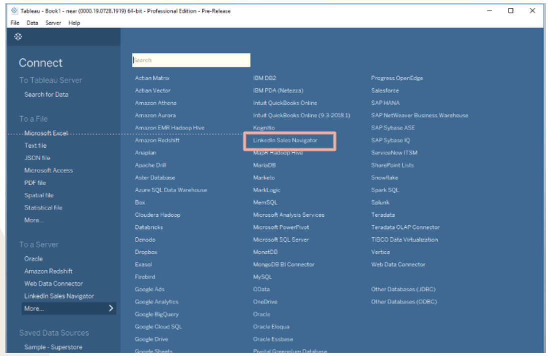
Personas + Value Propositions:

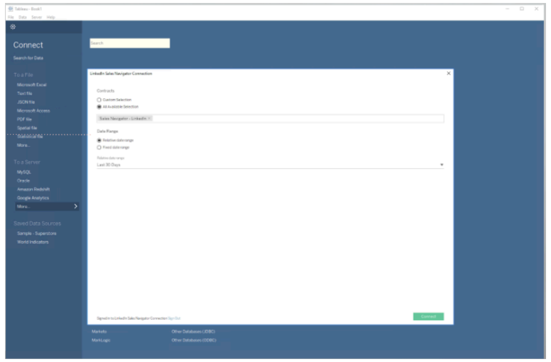
- For program managers / admins... get valuable insights and analysis faster
- For sales ops... uncover meaningful results
- For sales leaders... optimize sales performance

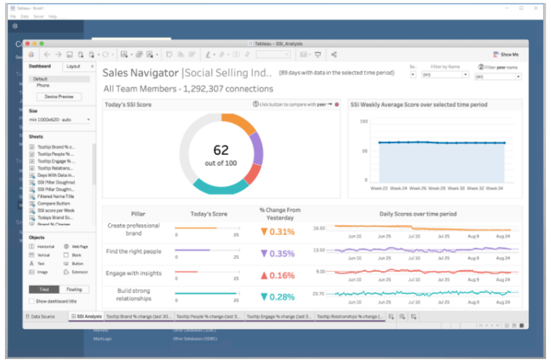
How it works

tableau

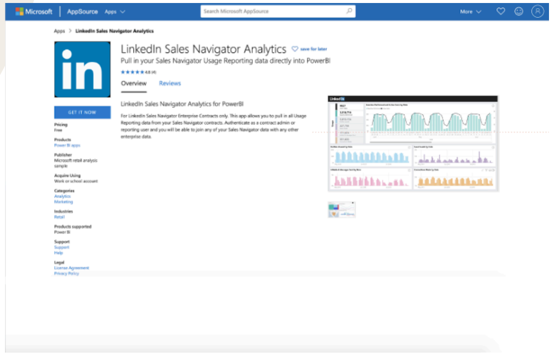


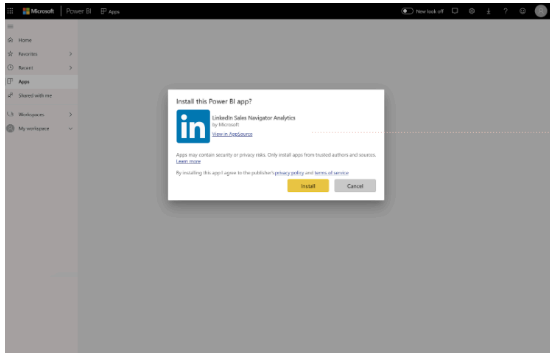


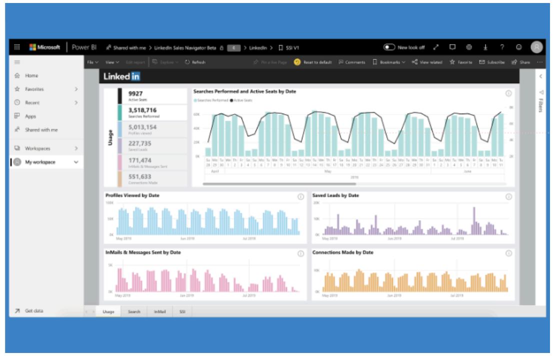




Power BI



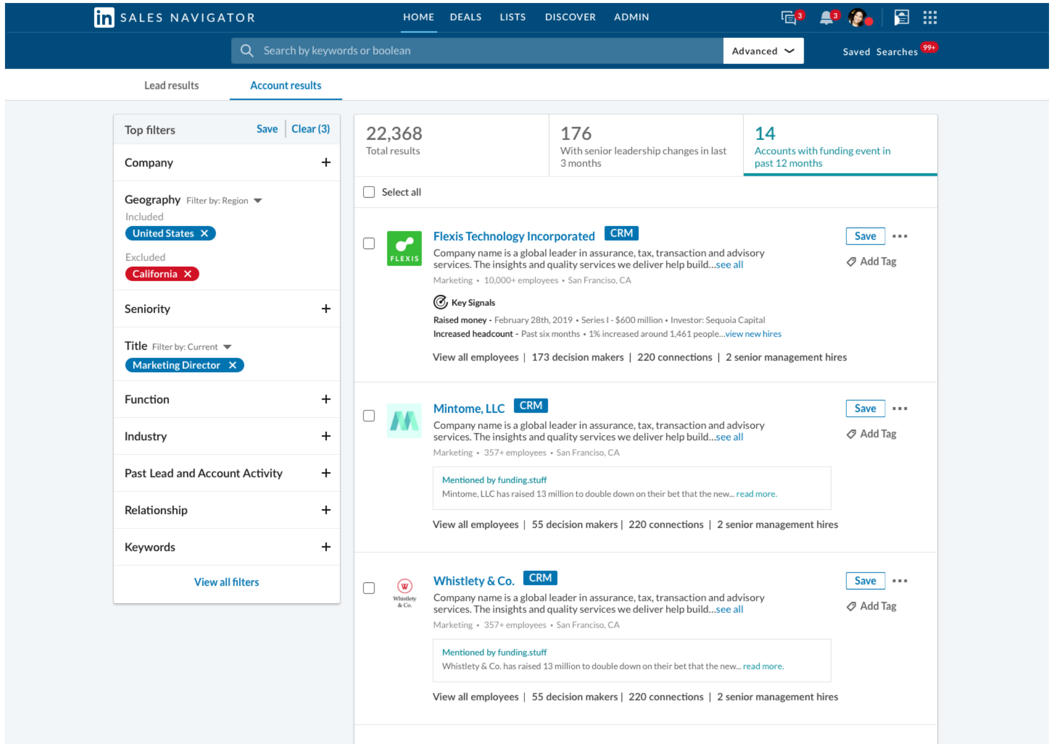




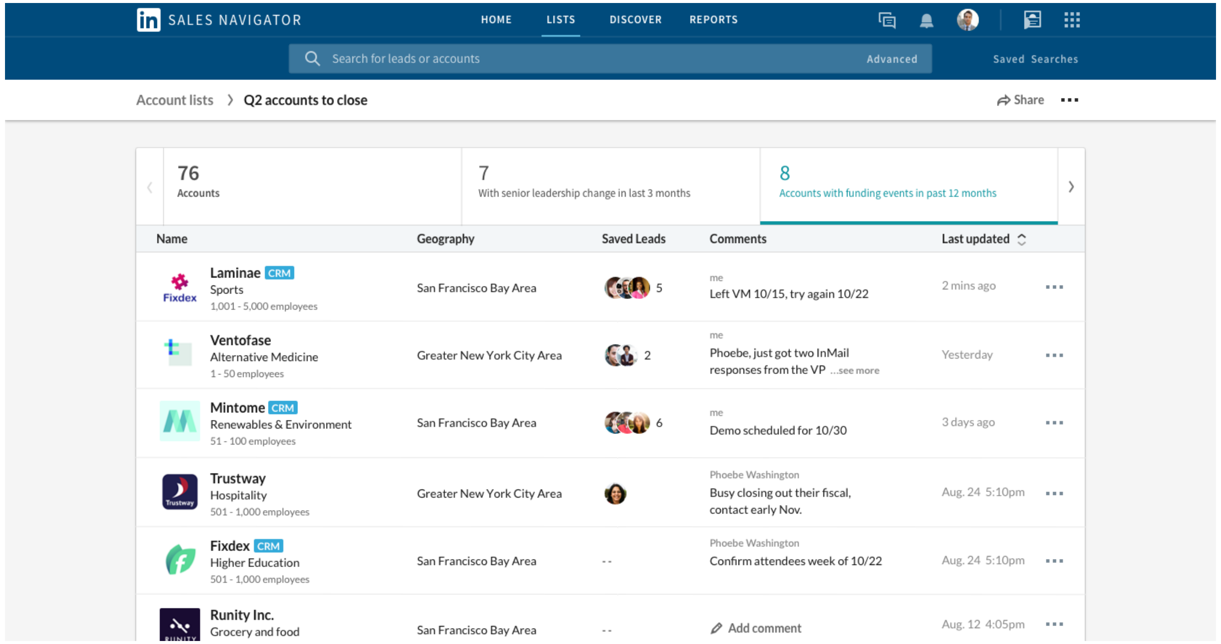
Funding Events Spotlight

What’s new?

This quarter we are launching a funding events spotlight for account search & account lists aimed at helping you understand the right time to target new accounts or re-engage prior ones.



Spotlight in account search



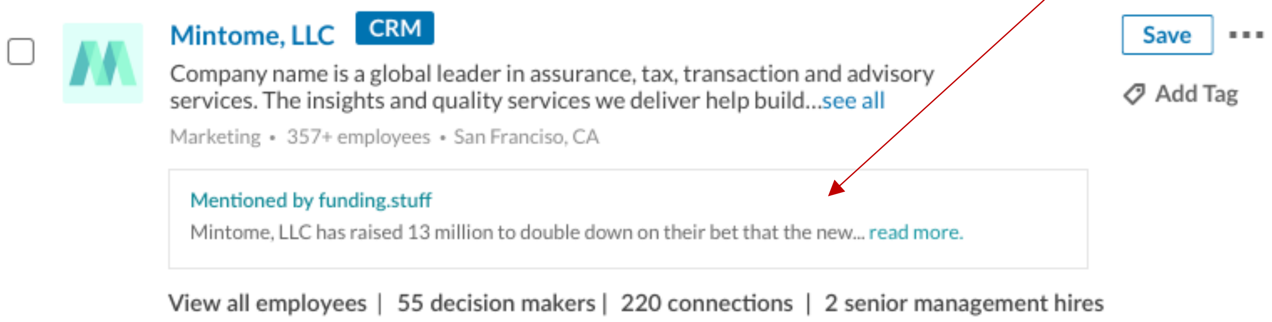
Spotlight in account lists

Any account search that yields results who have had a funding event in the past 12 months will populate under the spotlight with a link to the associated article directly on the result.

Any account list with saved accounts who have had a funding event in the past 12 months will populate under the spotlight with a link to the associated article directly on the result.

Deep Dive: Link to funding event article

Link to article on the web associated with the funding event!

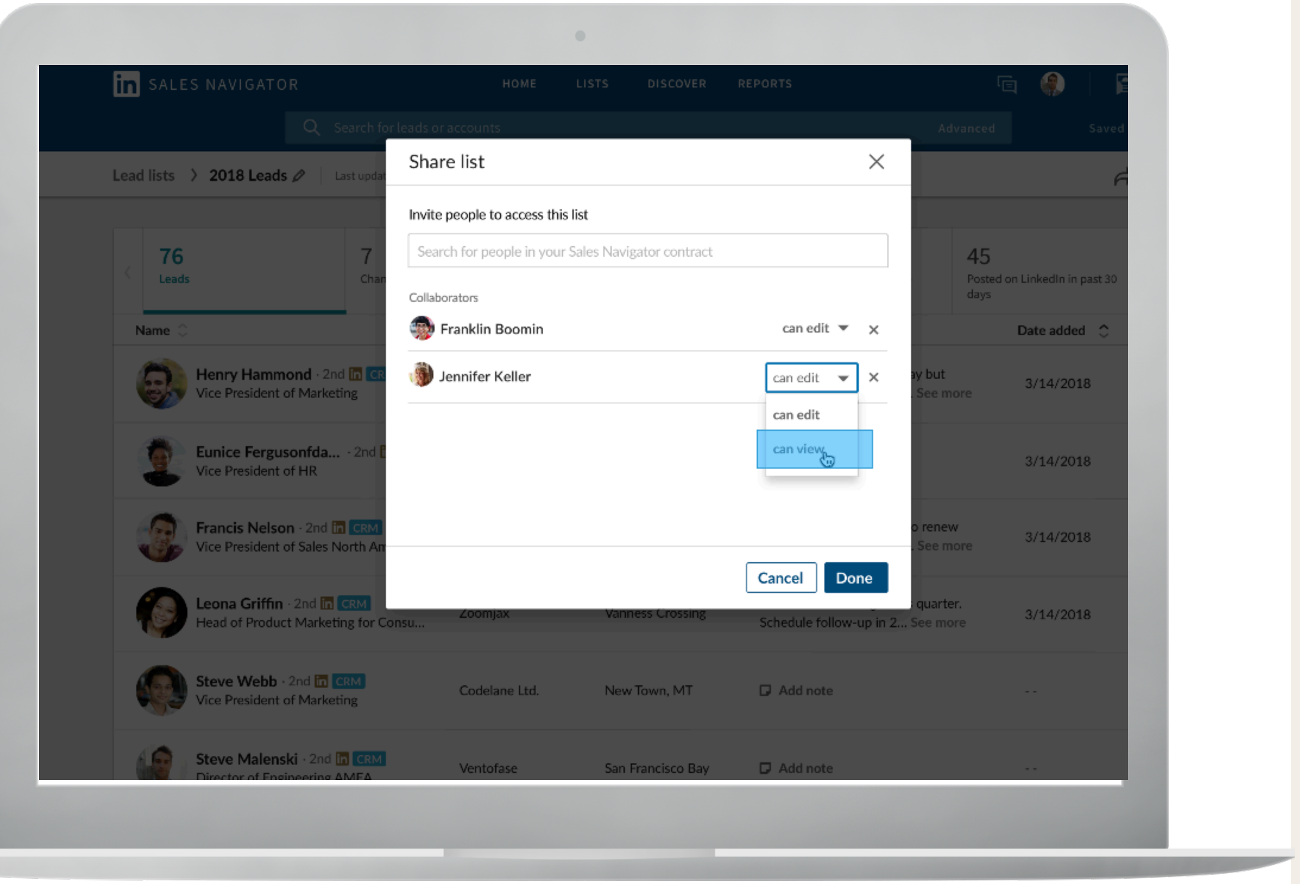


Lists Enhancements & Permissions

Permissions, Alerts, and Descriptions

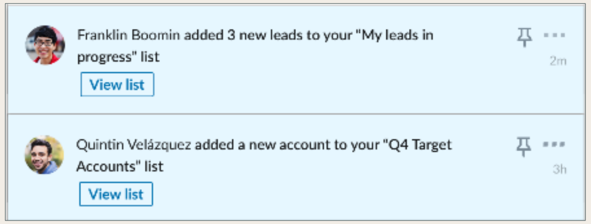
What’s new?

Lists Permissions, Alerts, & Descriptions



Permissions

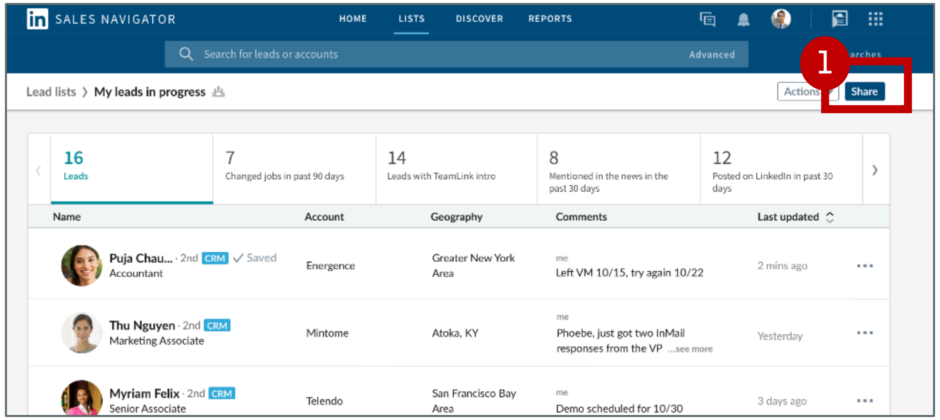
- **Permissions:** List owners will have the ability to designate View Only or Edit permissions to ensure collaborators modify the appropriate list. Those with edit access will be able to add, remove, and comment on leads or accounts within the list
- **Alerts:** List Collaborators will now receive alerts when leads or accounts have been added or removed from a custom list
- **Descriptions:** List owners will be able to add context for others by including a short description on their List.

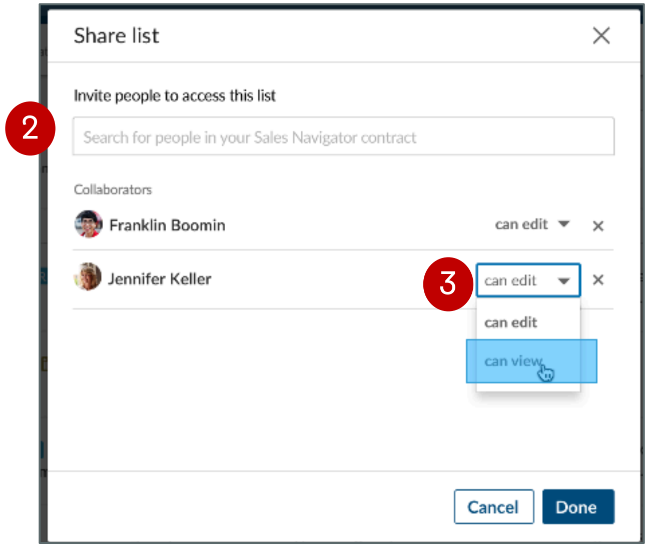


Alerts

If you are the **owner** of a list you can set permissions for new collaborators or exit permissions for existing collaborators:

How it works: Setting Permissions



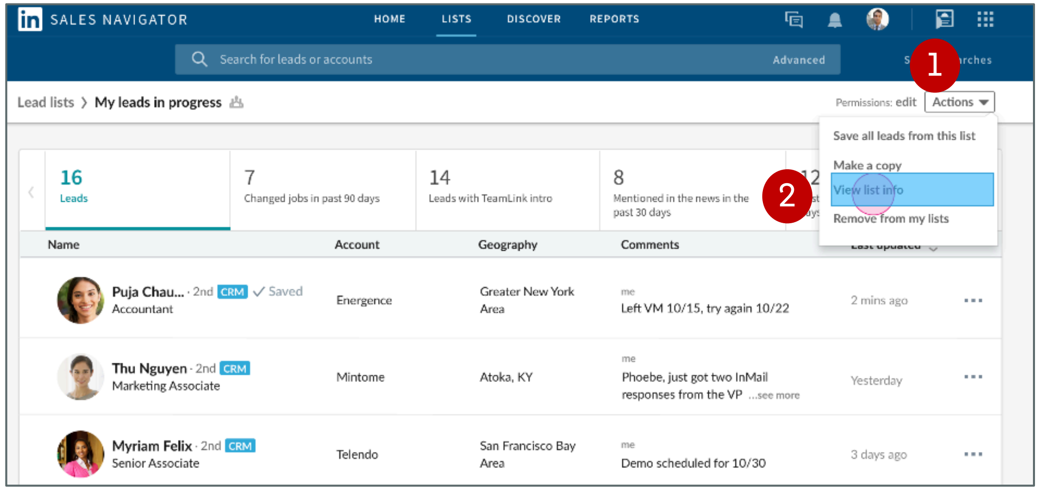


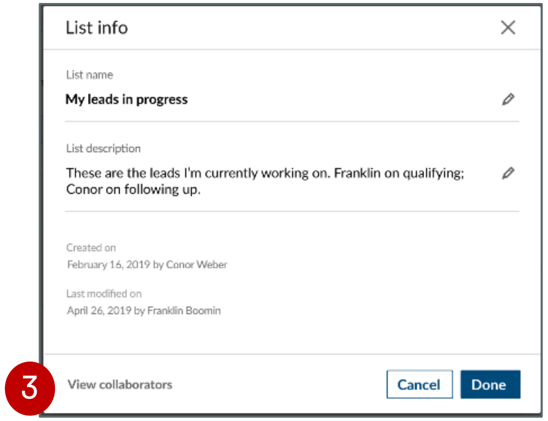
1. In your custom list, click "share"
2. If sharing with someone new, type the name of the person to find and add them*
3. You can edit each collaborators permissions using the drop down menu next to their name

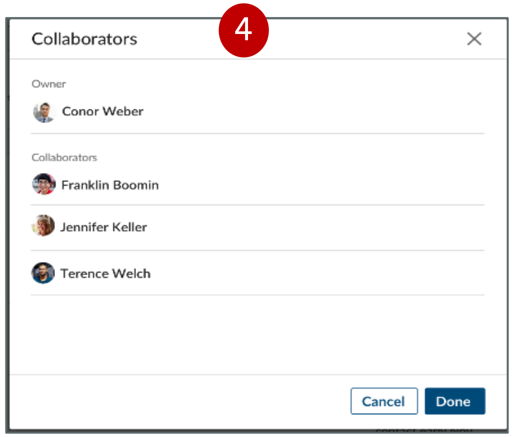
*You can only share lists with other people on your contract

How it works: Viewing Collaborators

If you are a **collaborator** on a list you can view a list of your collaborators from the "Actions" drop-down in your shared list:



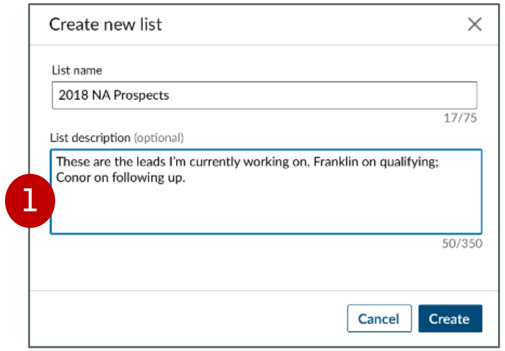




1. In your shared list, click on the "Actions" drop-down
2. In the drop-down menu, select "View List Info"
3. From the "List Info" pane, select "View Collaborators"
4. From here, you will be able to view the list owner and all collaborators

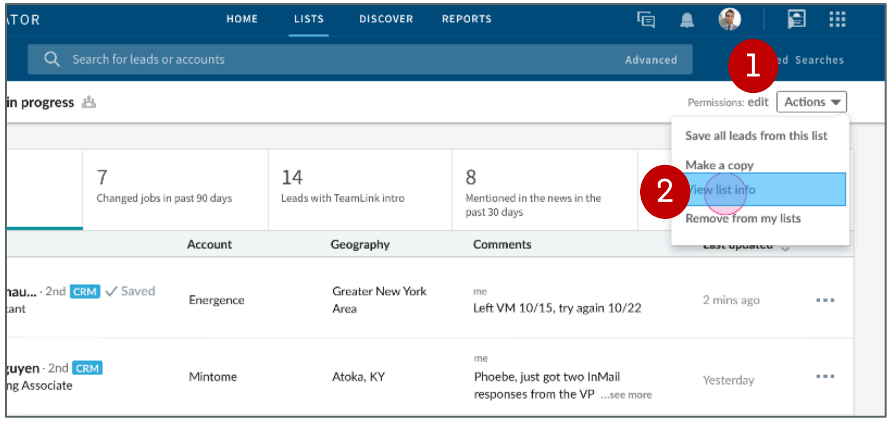
How it works: Creating List Descriptions

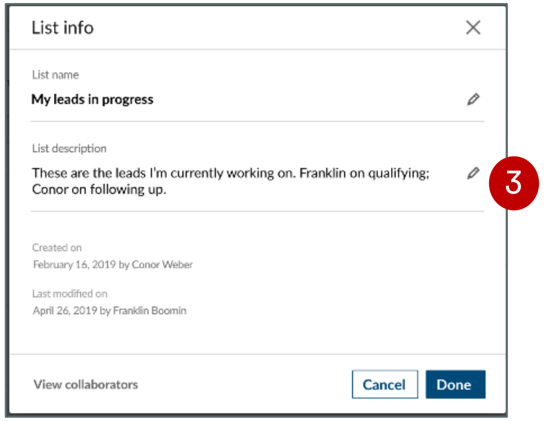
You can **add list descriptions** when creating a new list: from your search results or lists hub:



1. You can add a list description when creating a new list. This step is optional.

You can also **edit existing list descriptions** (if you are an owner or if you have edit access):

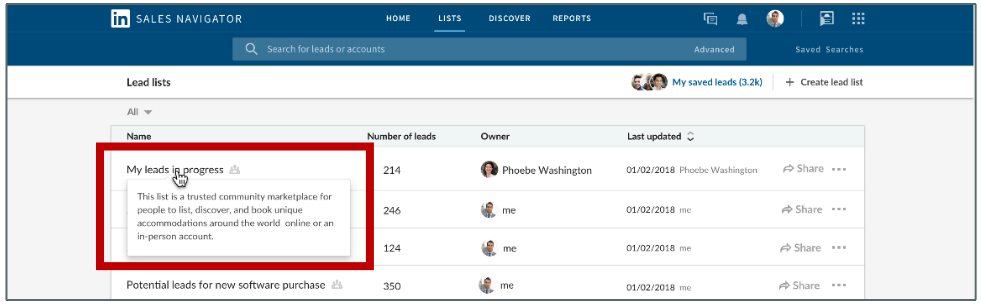




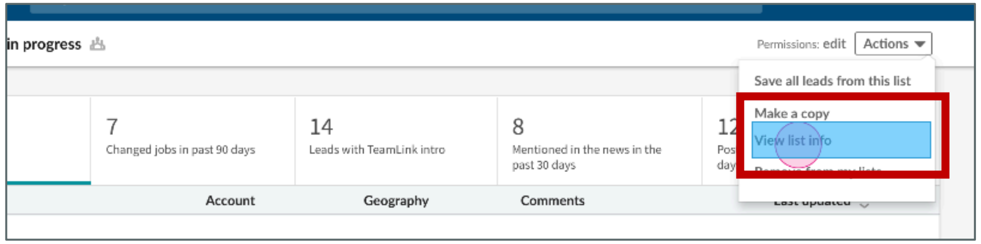
1. In your shared list, click on the "Actions" drop-down
2. In the drop-down menu, select "View List Info"
3. From the "List Info" pane, click the pencil icon next to "List description" to edit

How it works: Viewing List Descriptions

List Descriptions can be **viewed** from the following locations:



In the Lists Hub, by hovering over the list name



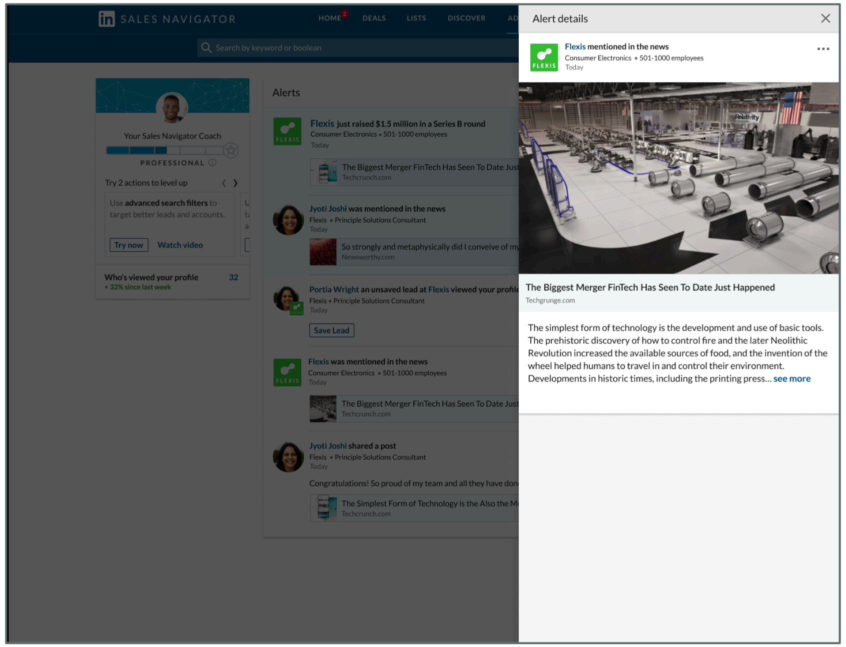
In the List itself, by selecting “View List Info” from the action drop-down

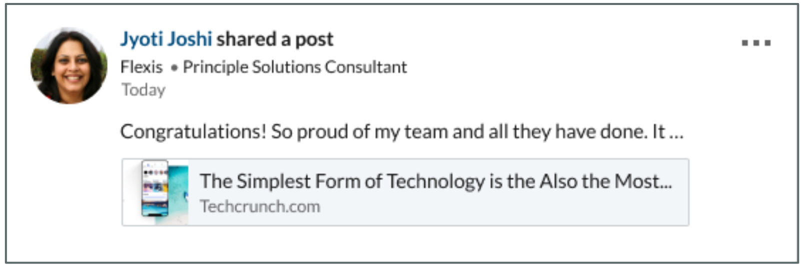
Homepage Enhancements

Slide-In Panel & Alerts Re-design

What’s new?

This quarter we are launching enhancements to the homepage experience aimed at improving your ease of use and maximizing efficiency.





Slide-in panel:

All Mentioned in the 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.

Re-designed Alert format:

The design of each individual alert has been enhanced so that key details of the saved account or saved lead can be more easily seen and accessed.

Deep Dive: Re-designed Alert Format

For Alerts on Saved Accounts:

Account Name (linked to Account Page)

Alert Type

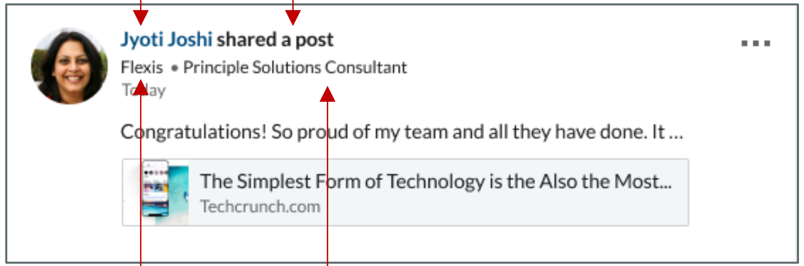
Account Size

Industry

For Alerts on Saved Leads:

Lead Name (linked to Lead Page)

Alert Type



Lead's Title

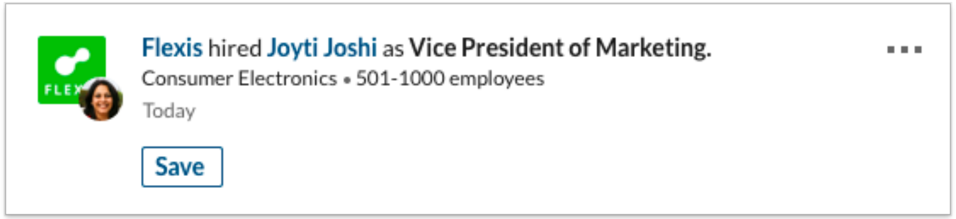
Account associated with the Lead

New Alerts

Headcount Growth, Senior Hires & New User alerts

What's new?

New Alerts: Headcount Growth & Senior Hires



Sales Navigator Alerts give you on time, relevant, and actionable insights on your saved leads and accounts. With Alerts, you can spend less time researching and more time selling and building relationships.

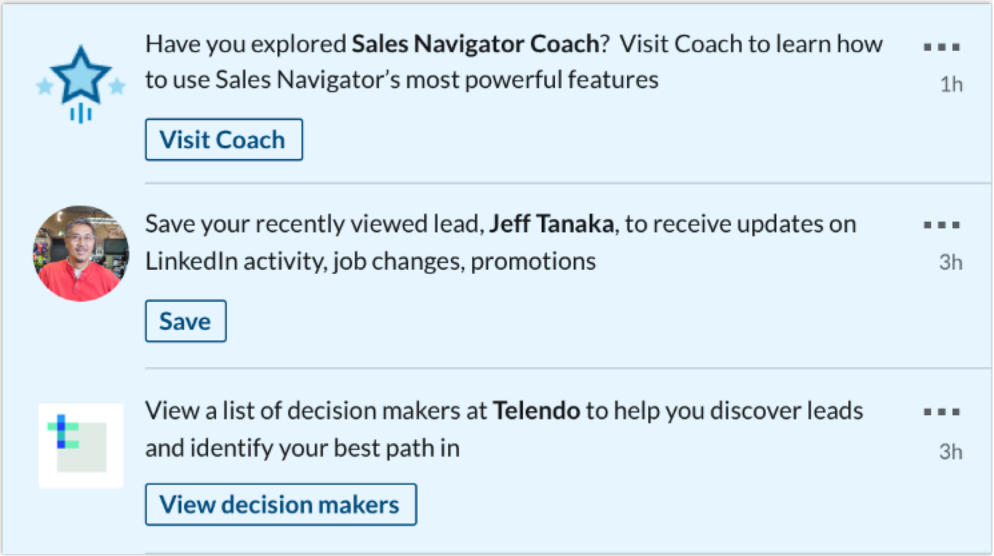
This quarter we are adding two new alerts for your saved accounts:

- **Your saved account has headcount growth:** This alert notifies you when a saved account has grown over 5% in the last 90 days
- **You have new senior hires at your saved account:** This alert notifies you when your saved account has a new senior management hire.

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

What's new?

New Alerts: New Users



Sales Navigator Alerts give you on time, relevant, and actionable insights on your saved leads and accounts. With Alerts, you can spend less time researching and more time selling and building relationships.

This quarter we are adding three new alerts to help users get started in the product.

- **Visit Sales Navigator Coach:** This alert on day 2 sends new users to Sales Navigator Coach to get them started trying features.
- **Save your recently viewed lead:** This alert on day 4 prompts users who have never saved a lead to save a lead they viewed recently.
- **View decision makers:** This alert on day 7 encourages users to view decision makers at a saved or viewed account.

Bing Geo Migration

What's new?

This quarter, we are changing the data powering our geography filter to Bing Maps data. This change should vastly increase our location coverage and provide more accurate search results for searches involving the geography filter.

Key Highlights & Data Wins!

1. Expanding our country coverage.
2. Adding 2,000+ states/provinces.
3. Adding 2.4 million cities.
4. City level search for 100+ countries that previously could only be searched as a country.
5. More accurate taxonomy of postal codes and regions.

The Number of Cities Available is Increasing By….

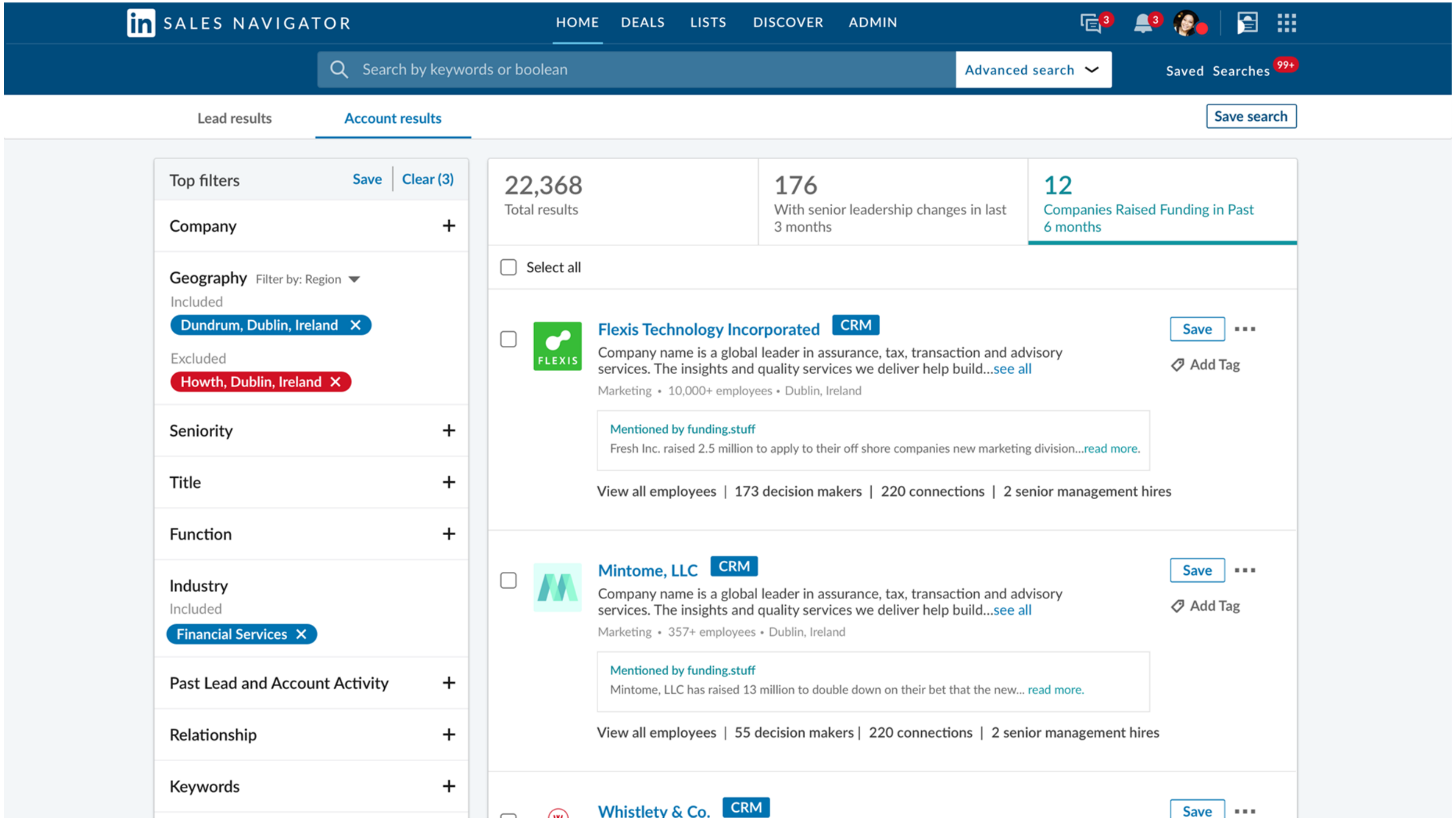
1. 1,174% for APAC
2. 647% for EMEA
3. 515% for LATAM
4. 228% for MENA
5. 186% for NAMER

Impact to User Experience:

- When searching by location, you'll notice that the names of regions or areas you're familiar with may have changed (e.g. "greater New York City Area" is now "New York City Metropolitan Area")

- Saved searches that use location should automatically update to reflect the new location. This may result in a one-time slight change in the total results in a saved search.

Deep Dive: A look at new Bing geography data

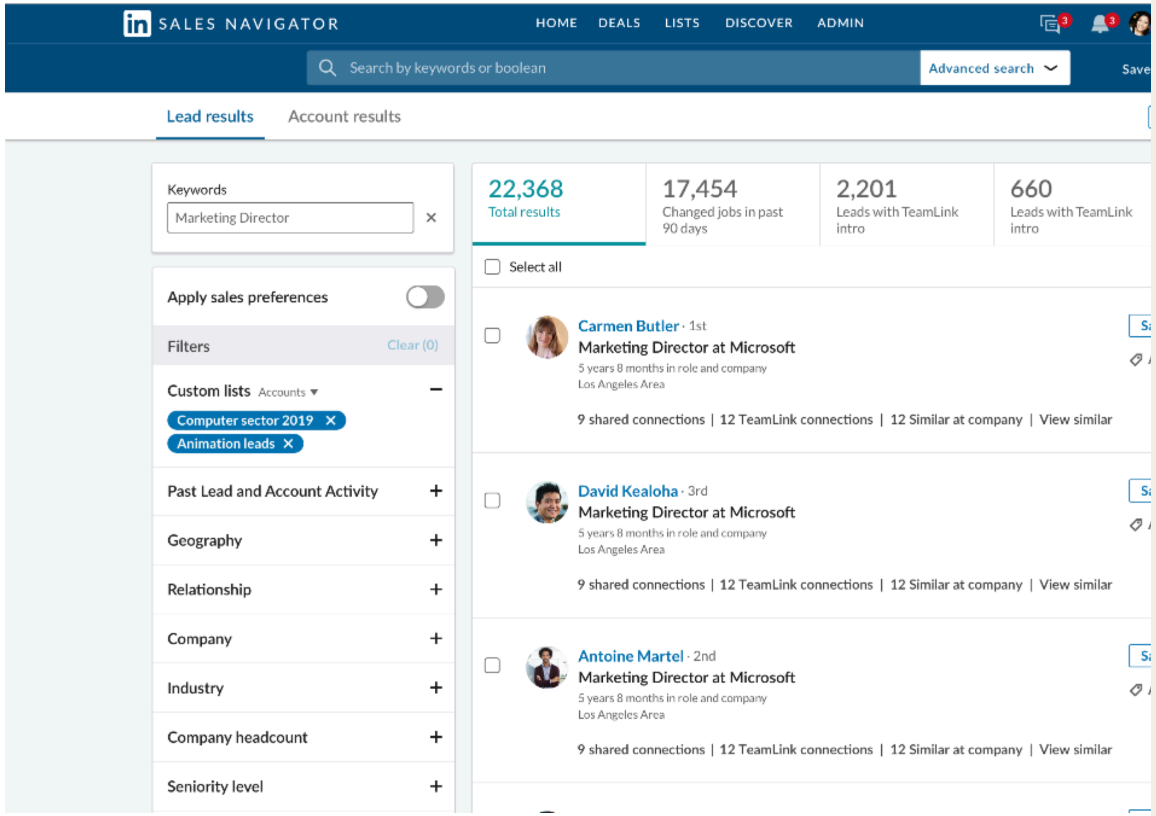


Lead Search within Lists

FIND THE LEADS YOU WANT IN THE ACCOUNTS YOU'VE ALREADY DEEMED IMPORTANT

What's new?

Lead Search Within Lists



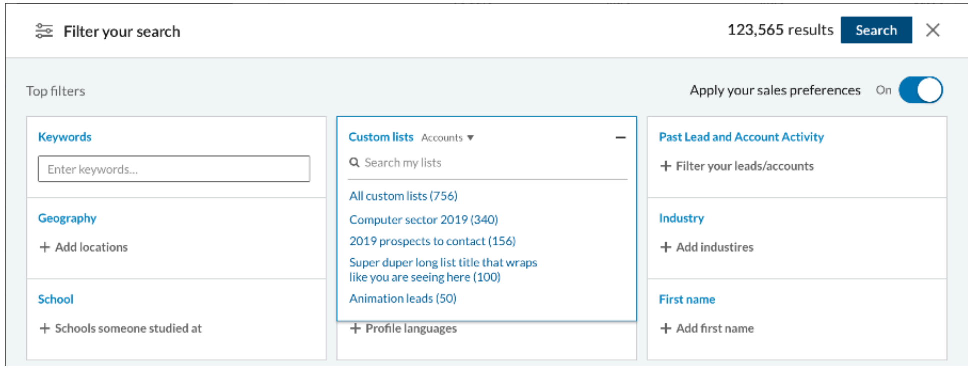
DETAILS

Now you can quickly and easily search for leads from the accounts that matter to you by filtering your lead searches so they only search for relevant leads within the Account or Lead Lists you've created (or that have been shared with you).

This filter is available for lead searches only (not account searches) on the desktop version of Sales Navigator. Users can search for a lead from within one, several, or all of their Account or Lead Lists (not both together).

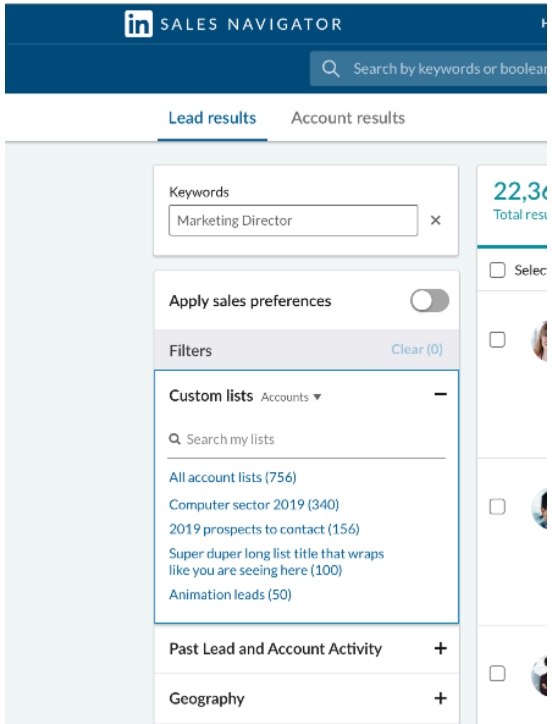
How it works

1



Start a new search that only searches within one or more of your Custom Lists or…

2



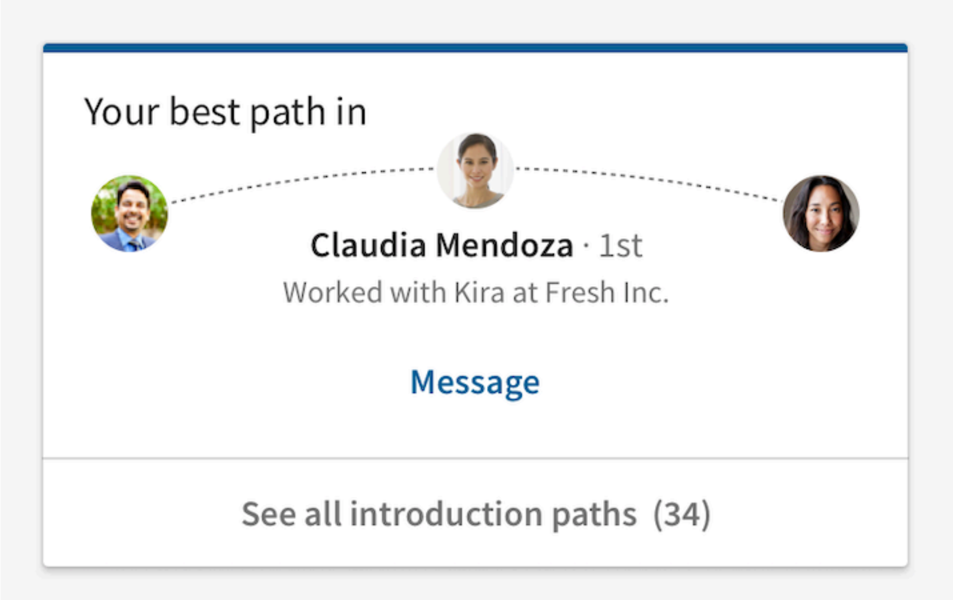
…Add a filter to a completed or saved search.

Best-Intro-Path Improvement

FIND THE BEST INTRODUCER TO REACH OUT TO FOR HELP CONNECTING WITH A LEAD

What's new?

Best-Intro-Path



<u>Find the best way in</u>
Using connection strength scores based on members interaction, we pick the best introducer (highest connection strength score to seller and buyer) to reach out to for help connecting with a lead.

No setup needed, available for all Sales Navigator users.

SNAP Partners

SNAP Integrations: New Partners

In addition to our new Business Intelligence category, we are announcing the next wave of partner integrations available on the Sales Navigator Application Platform (SNAP) as well as an updated look, feel, and functionality for select existing partner integrations.

Our latest integrations are shown below, representing an expansion of our offerings in the following SNAP categories:

Business Intelligence

CRM

Oracle Sales Cloud (refresh)

eSignature

Marketing Automation

Sales Acceleration

Web Conferencing

Other