



LinkedIn

Sales Navigator Q2 '20 Release

Product Updates and New Features



About this document

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

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



Community Idea

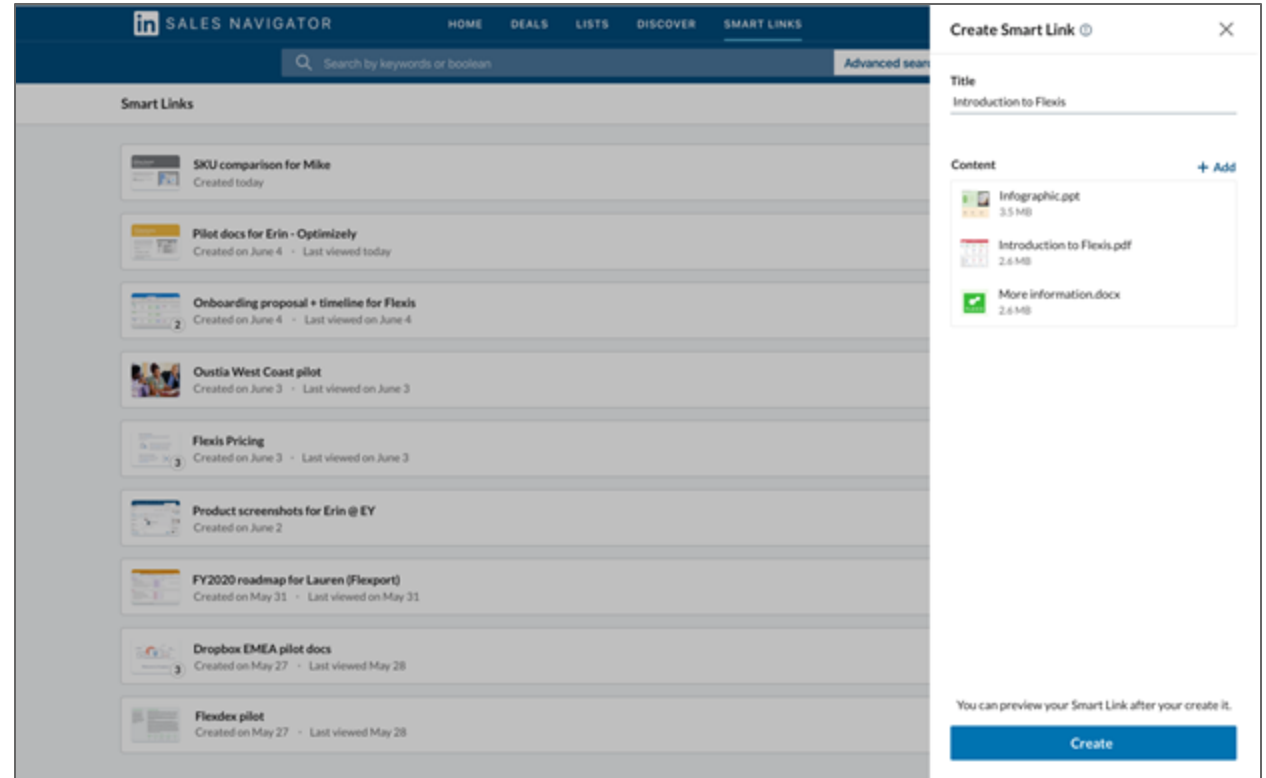
Smart Links

Workflow Additions

Smart Links launched this quarter

Smart Links allows users to:

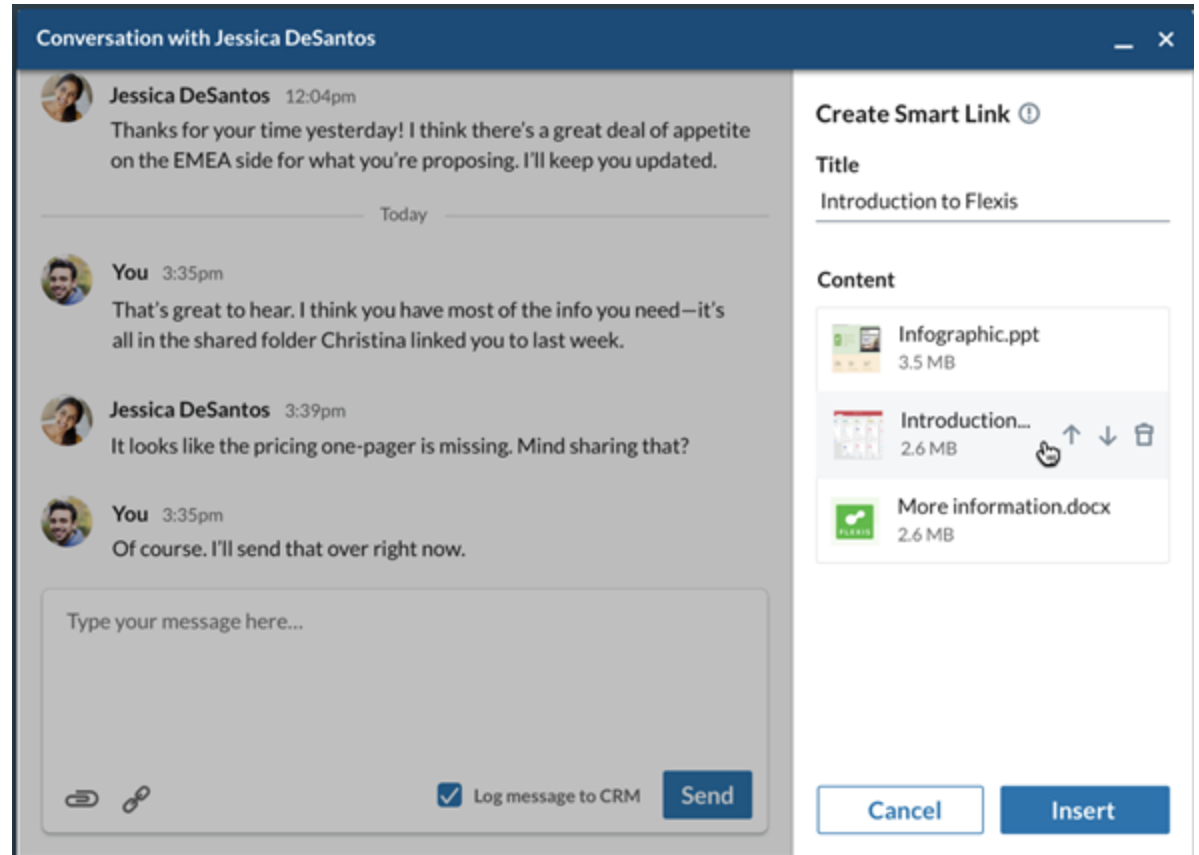
- **Easily package content into one link without leaving their workflow:**
Users will be able to quickly bundle their content into one link that can be shared from Sales Navigator, InMail, or email.
- **Track how recipients are engaging with content:**
Users will be provided with real-time insights on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



Smart Links Q2 Workflow Additions

- **InMail workflow:** The ability to create a Smart Link from within InMail
- **Mobile support:** Access Smart Links from messaging on mobile – on Sales Navigator Mobile App
- **Alerts:** Receive an alert when someone is viewing your Smart Link
- **Smart Links in Usage Reporting:** (presentations created by user and number of viewers by user)
- **CRM Writeback** for Salesforce and Dynamics (Enterprise SKU only)

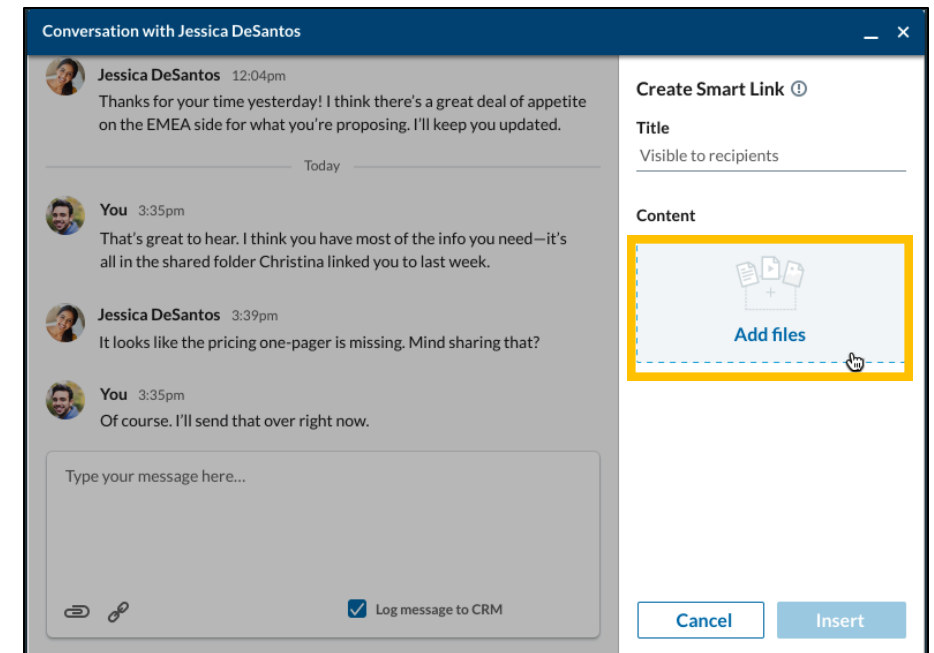
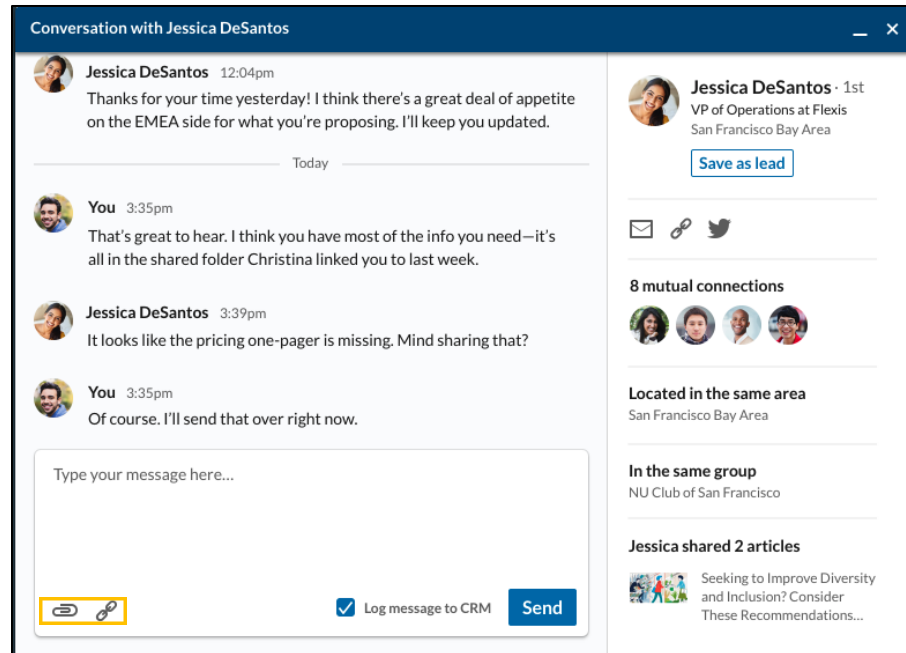
Smart Links is available to Team and Enterprise SKU, except for CRM Writeback, which is only available to Enterprise SKU



InMail workflow

Step-by-Step: InMail Messaging Flow

Creating new Smart Links via "Paper Clip or Link icon"

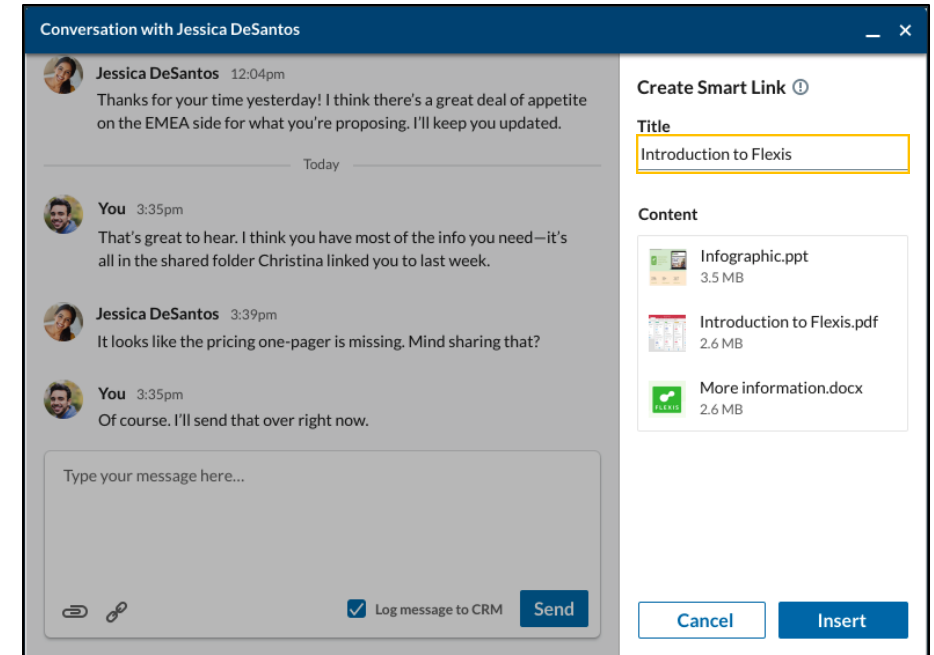
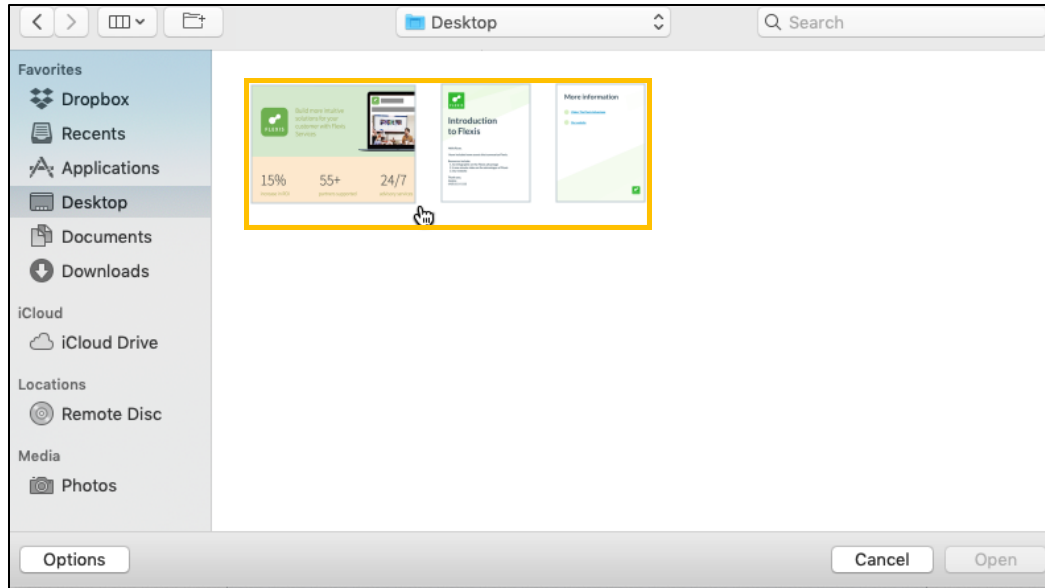


1. User clicks paper clip or link icon

2. User chooses one or more files

Step-by-Step: InMail Messaging Flow

Creating new Smart Links via "Paper Clip or Link icon"

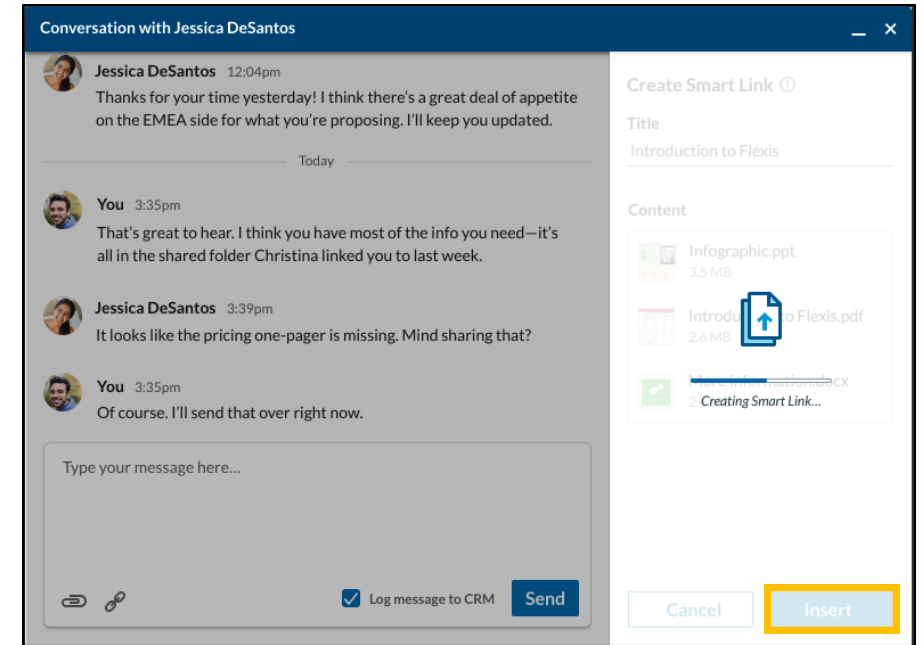
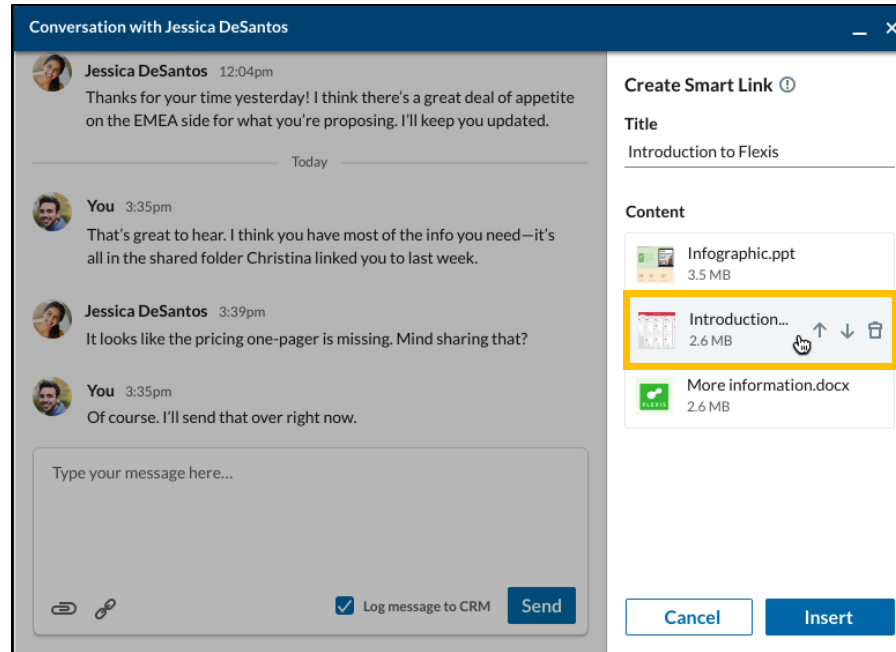


3. User selects files to add to their presentation

4. User customizes the name of the Smart Link

Step-by-Step: InMail Messaging Flow

Creating new Smart Links via "Paper Clip or Link icon"



5. User has the option to:
- Reorder files as needed
 - Add additional files
 - Remove files

6. User clicks "Insert" to create the Smart Link, and have the URL dropped into the body of their messaging composer

Deep dive: Smart Links CRM Writeback

Enterprise SKU only, requires CRM Sync for Salesforce or Microsoft Dynamics 365



The image displays two overlapping screenshots. The top screenshot is from the Salesforce interface, showing a task titled "Smart Link View from Sales Navigator - Sales Navigator Overview". The task is marked as "Completed" and includes fields for "Assigned To", "Due Date" (4/3/2020), "Priority" (Normal), and "Status" (Completed). The bottom screenshot is from the Microsoft Dynamics 365 interface, showing a "Sales Navigator Overview" activity record. The activity is marked as "Completed" and includes fields for "Date Created" (4/2/2020), "Last Updated" (4/2/2020), "Actual Start" (4/2/2020), "Due Date", "Regarding", "Activity Status" (Completed), and "URL" (https://www.linkedin.com/sales/smart-links/AQFcc0Fhmb...).

Smart Links CRM Writeback provides an automated activity logging process anytime a Smart Links presentation is viewed or engaged with by a LinkedIn member, saving salespeople countless time.

- Smart Links CRM writeback will automatically log activities, to both Salesforce and Microsoft Dynamics 365, when LinkedIn members view a Smart Links.
- For Sales Navigator users with CRM Sync enabled, the CRM writeback event will be triggered at the same time as a Smart Link email notification or home page alert. That is, one per viewing session, unless the same viewer initiated a viewing session less than 60 minutes ago.
- Enterprise SKU only

This workflow is available in addition to the current Smart Links workflow in your Sales Navigator top navigation pane

Additional Resources

Deep Dive: Smart Links Workflow Additions

- [Smart Links - Overview](#)
- **InMail workflow:** The ability to create a Smart Link from within InMail
- **Mobile support:** Access Smart Links from messaging on mobile – on Sales Navigator Mobile App
- **Alerts:** Receive an alert when someone is viewing your Smart Link
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- **CRM Writeback** for Salesforce and Dynamics (Enterprise SKU only)

Contact Creation for Microsoft Dynamics 365

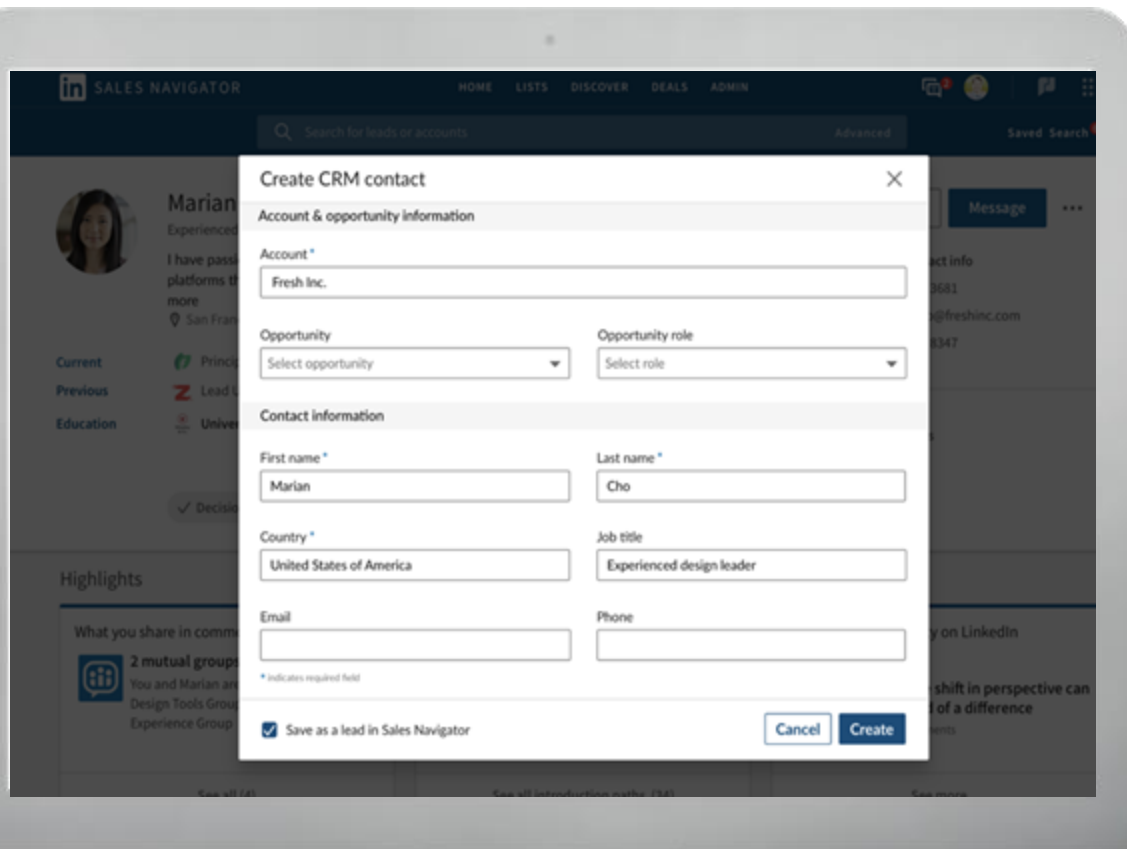
Enterprise SKU



Community Idea

Contact Creation for Microsoft Dynamics 365

Enterprise SKU Only



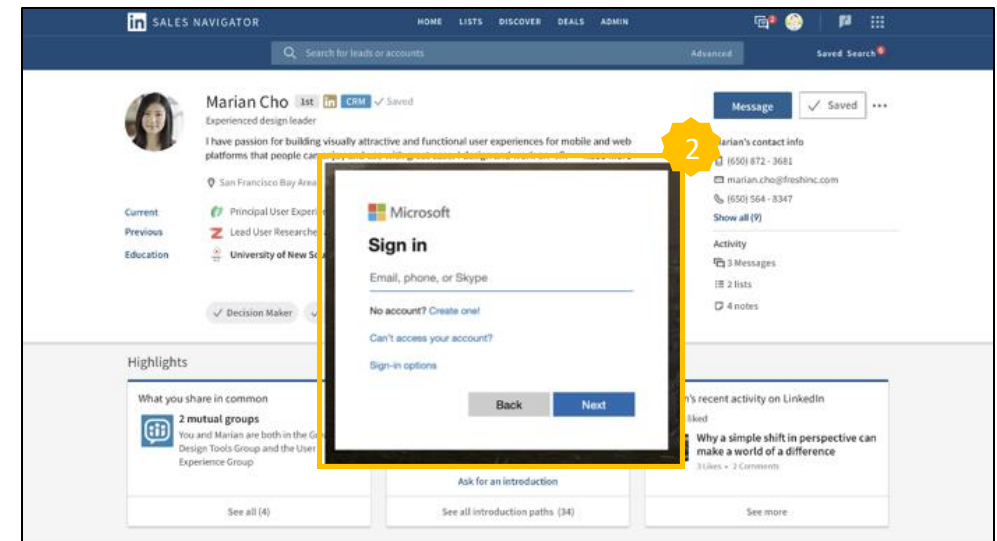
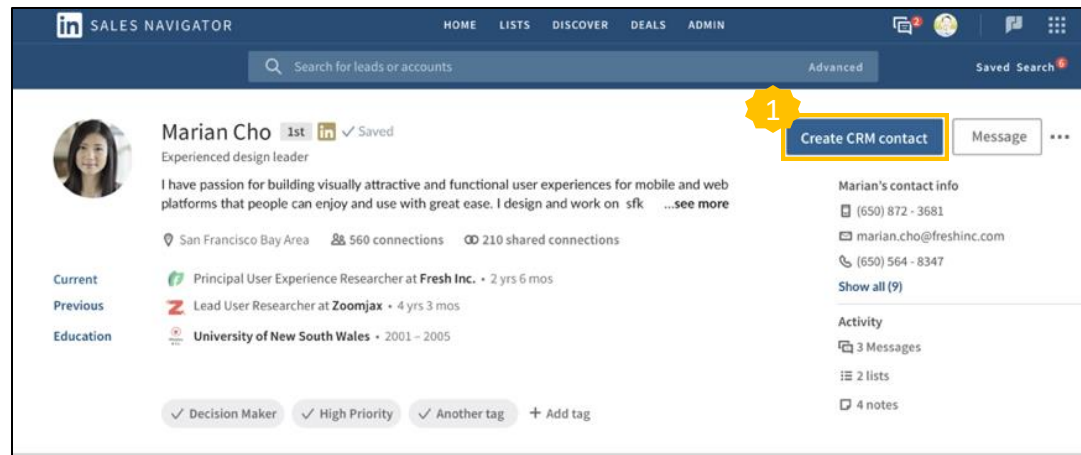
Contact Creation provides the ability for a user to create a Contact record in Microsoft Dynamics 365 for Sales from a Sales Navigator Lead Page or Lead List.

Standard supported fields include:

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

How to enable Contact Creation: User Instructions

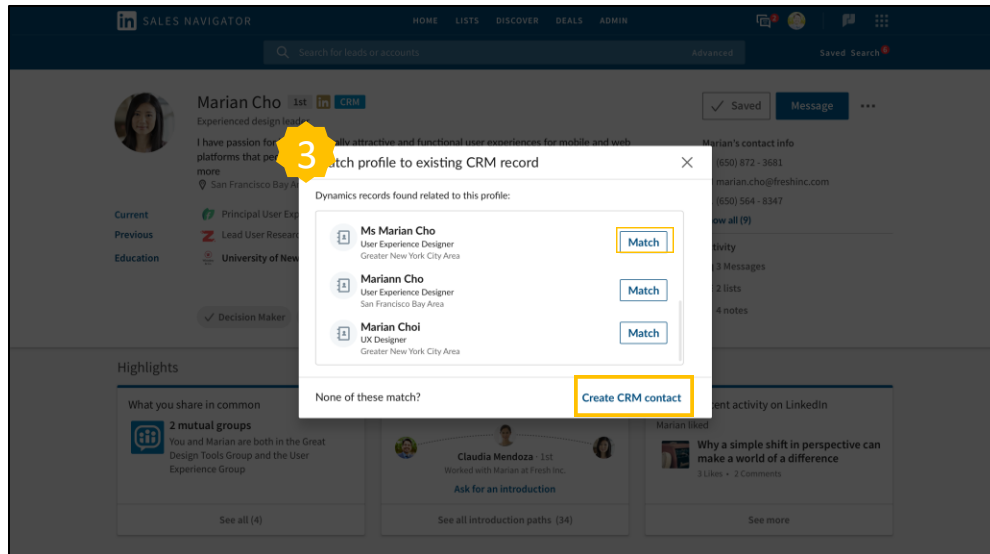
With Contact Creation, productivity is maintained by granting the option to stay within your workflow and add contacts from Sales Navigator to your CRM.



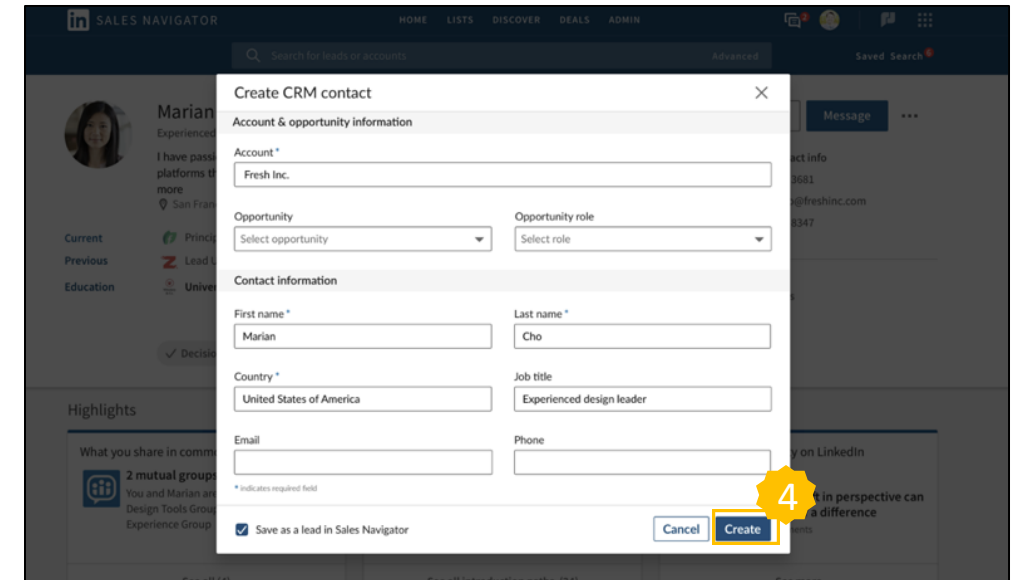
1. User clicks on “Create CRM Contact” from a Lead Page or Lead List

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

How to enable Contact Creation: User Instructions



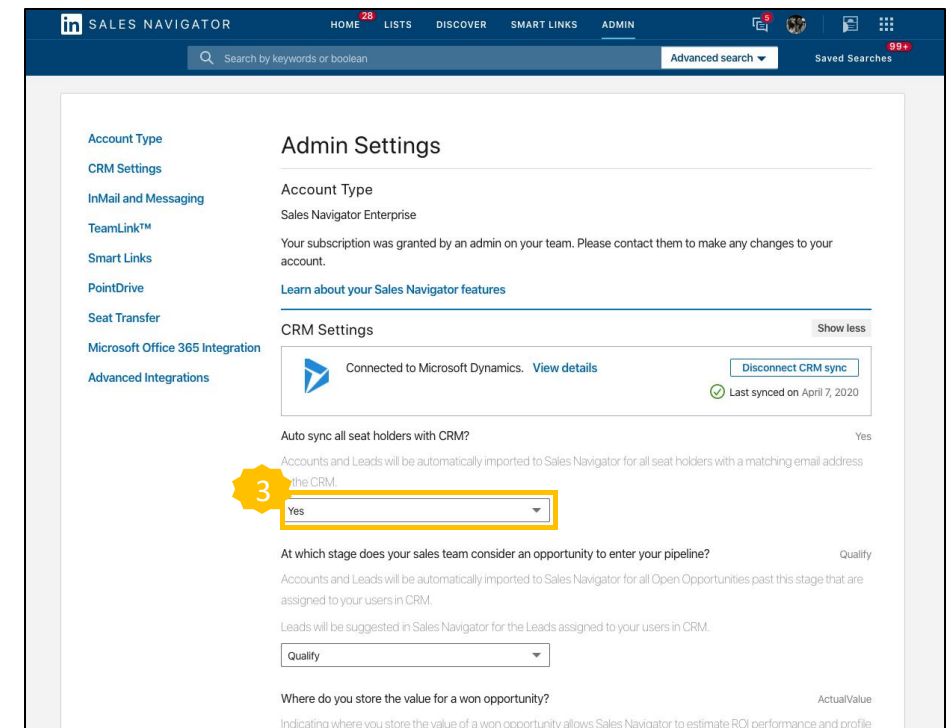
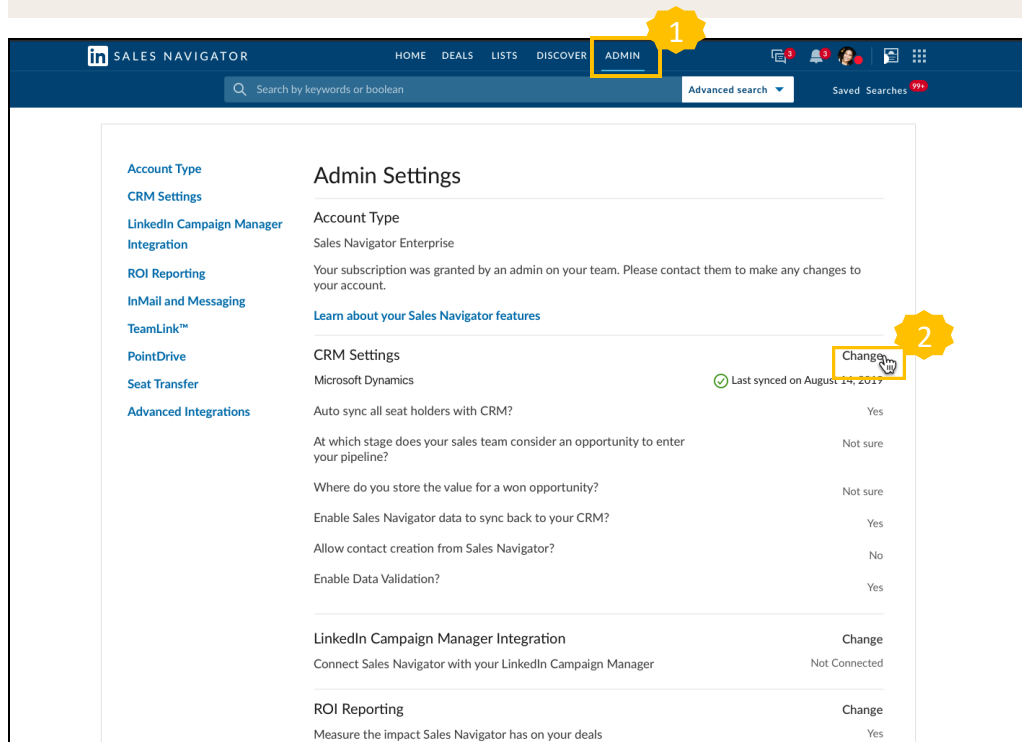
3. Sales Navigator will check if there are any existing Contact records that may match the lead profile, to avoid duplication and maintain CRM cleanliness. If there is a match, click “Match”. If not, click “Create CRM contact” to proceed



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

How to enable Contact Creation: Admin Instructions

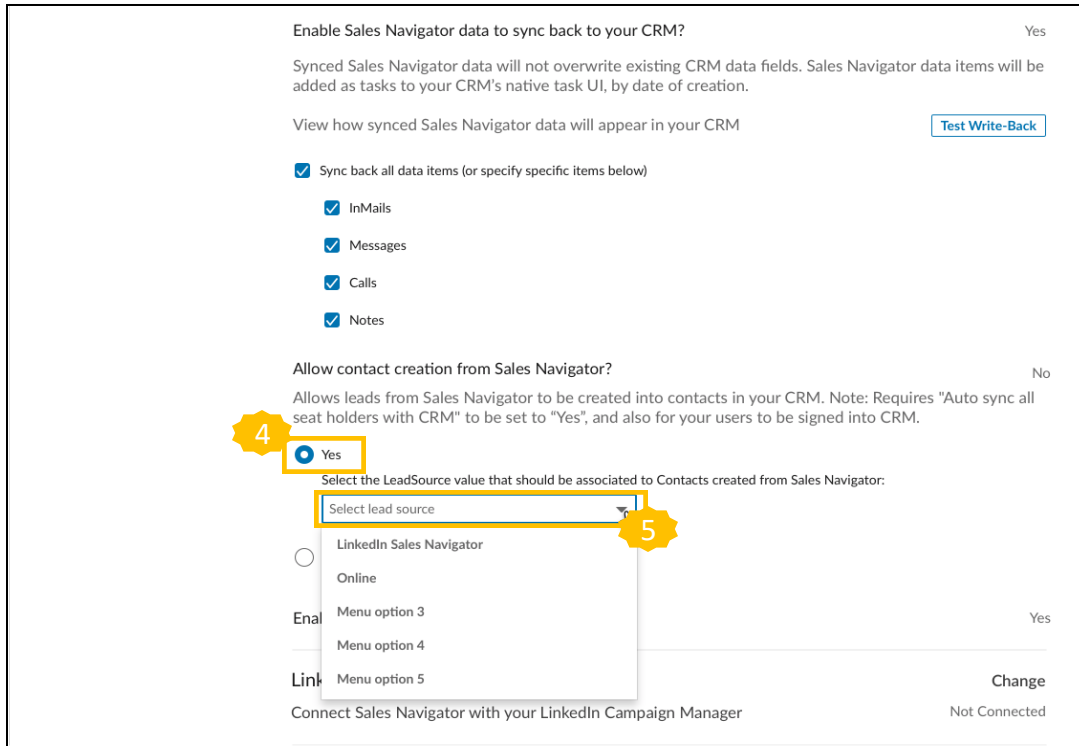
Sales Navigator Admins can maintain control of their organization by enabling the Contact Creation functionality for their users. Note: CRM Sync for Salesforce must be enabled



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

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

How to enable Contact Creation: Admin Instructions



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

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

View how synced Sales Navigator data will appear in your CRM Test Write-Back

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

- InMails
- Messages
- Calls
- Notes

Allow contact creation from Sales Navigator? No

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

Yes

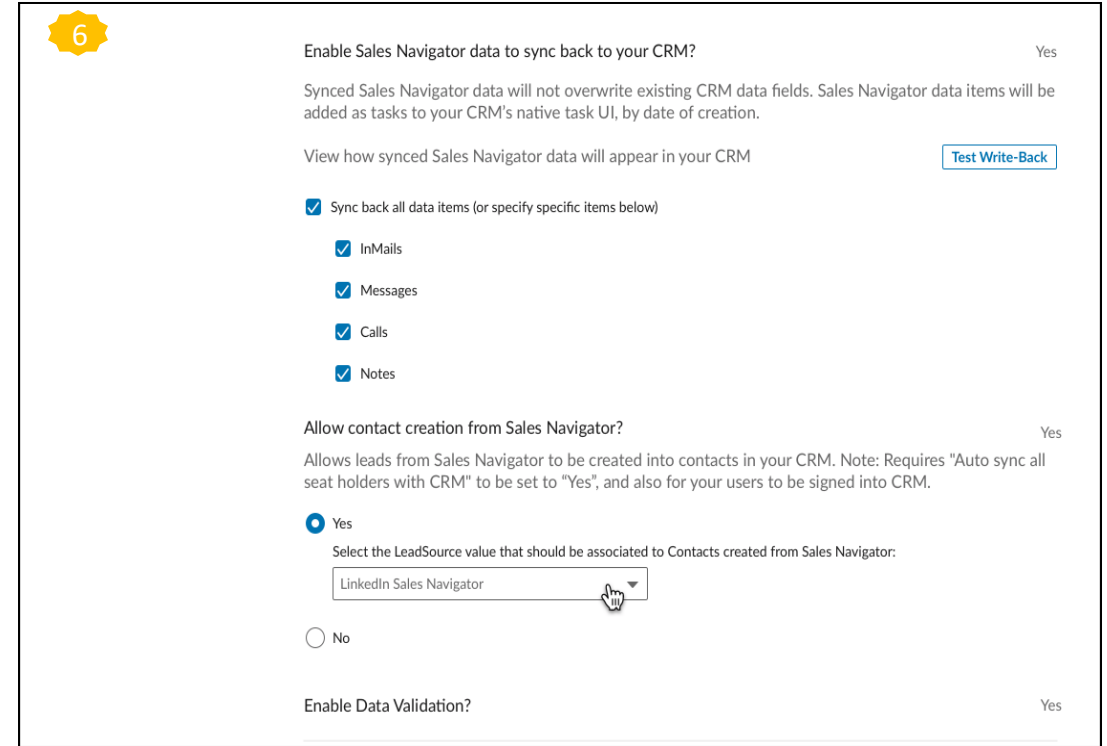
Select the LeadSource value that should be associated to Contacts created from Sales Navigator:

Select lead source

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

Connect Sales Navigator with your LinkedIn Campaign Manager Not Connected

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



6

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

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

View how synced Sales Navigator data will appear in your CRM Test Write-Back

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

- InMails
- Messages
- Calls
- Notes

Allow contact creation from Sales Navigator? Yes

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

Yes

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

LinkedIn Sales Navigator

No

Enable Data Validation? Yes

6. Contact Creation is now enabled!



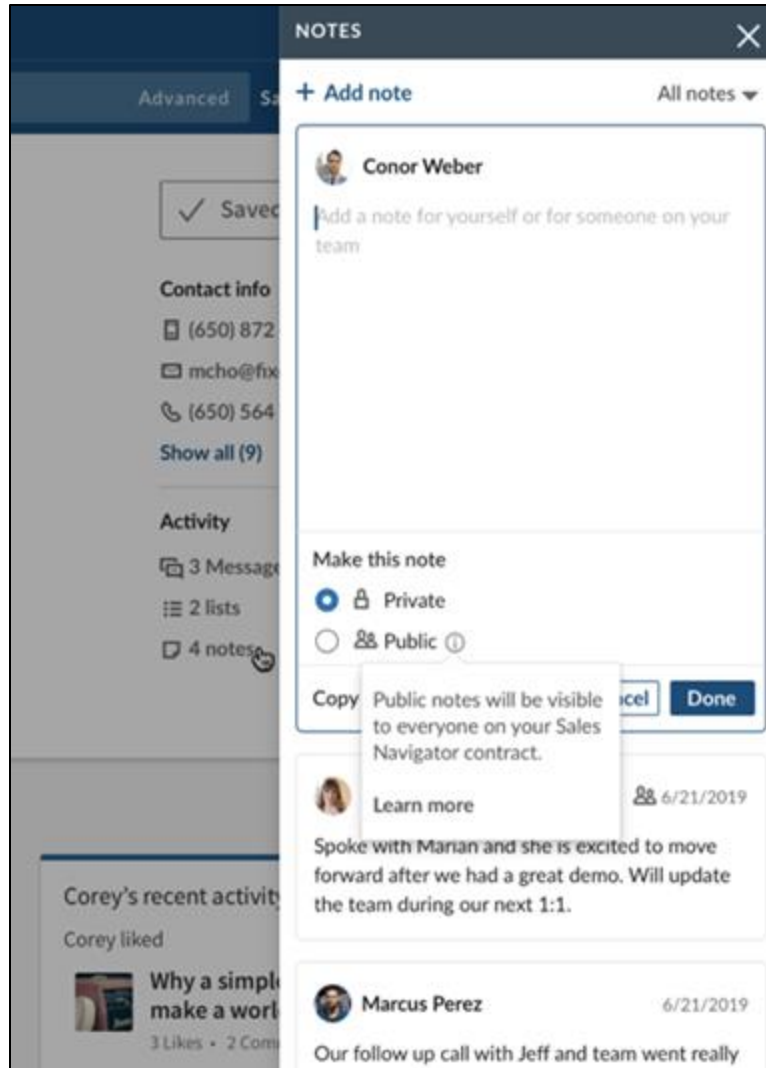
Community Idea

Notes in Sales Navigator

Consolidation of Notes & Comments

What's changing?

Notes in Sales Navigator



Consolidation of Notes & Comments

We will be removing the Comments entity from Custom Lists and replacing it with Notes. Notes will follow the Lead/Account wherever it is (lead/account page, list, search, etc).

- Notes will be able to be set to **Private** (visible only to me) or **Public** (visible to anyone on my Contract)
- Notes will continue to be written back to CRM, if the contract is synced

What happens to my existing notes and comments?

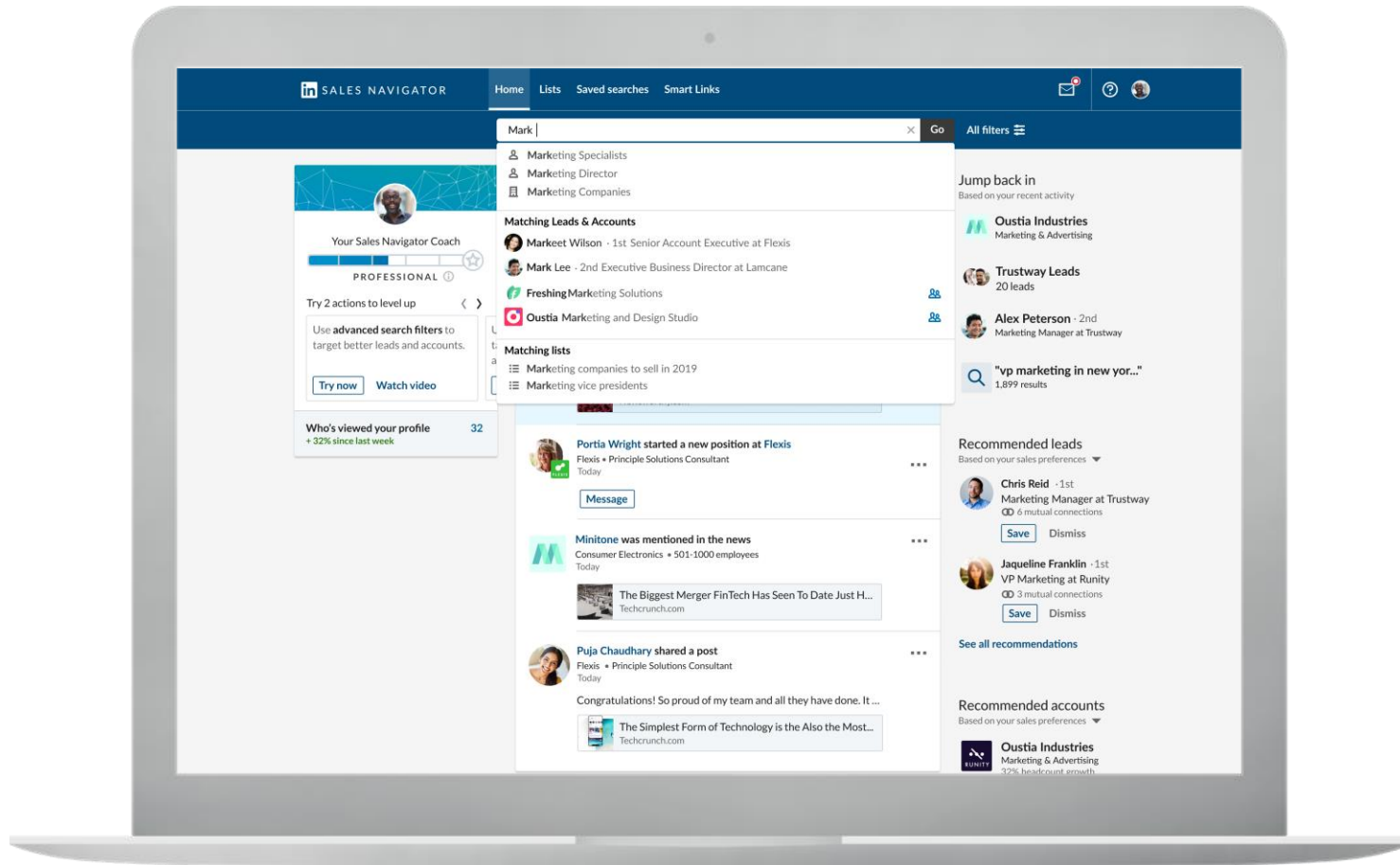
- Comments on lists that are shared will become “Public Notes”
- Comments on lists that are not shared will become “Private Notes”
- Existing notes on Lead /Account pages will become “Private Notes” and will also show up on any List the Lead is a part of

Search Enhancements

Search Starter/Typeahead

What's new?

Search Starter/Typeahead



Having a hard time figuring out which filters to apply in your search? With our launch, we are introducing an enhanced search bar in Sales Navigator.

This quarter we will be introducing a new search starter that will allow a user to choose popular lead and account filters from within the search dropdown. We will also introduce an enhanced search result dropdown that includes recommended accounts, leads, and saved lead/account lists.

Our enhanced Search Starter will make it easier for users to apply lead/account filters from within the search bar for more relevant and accurate search results.



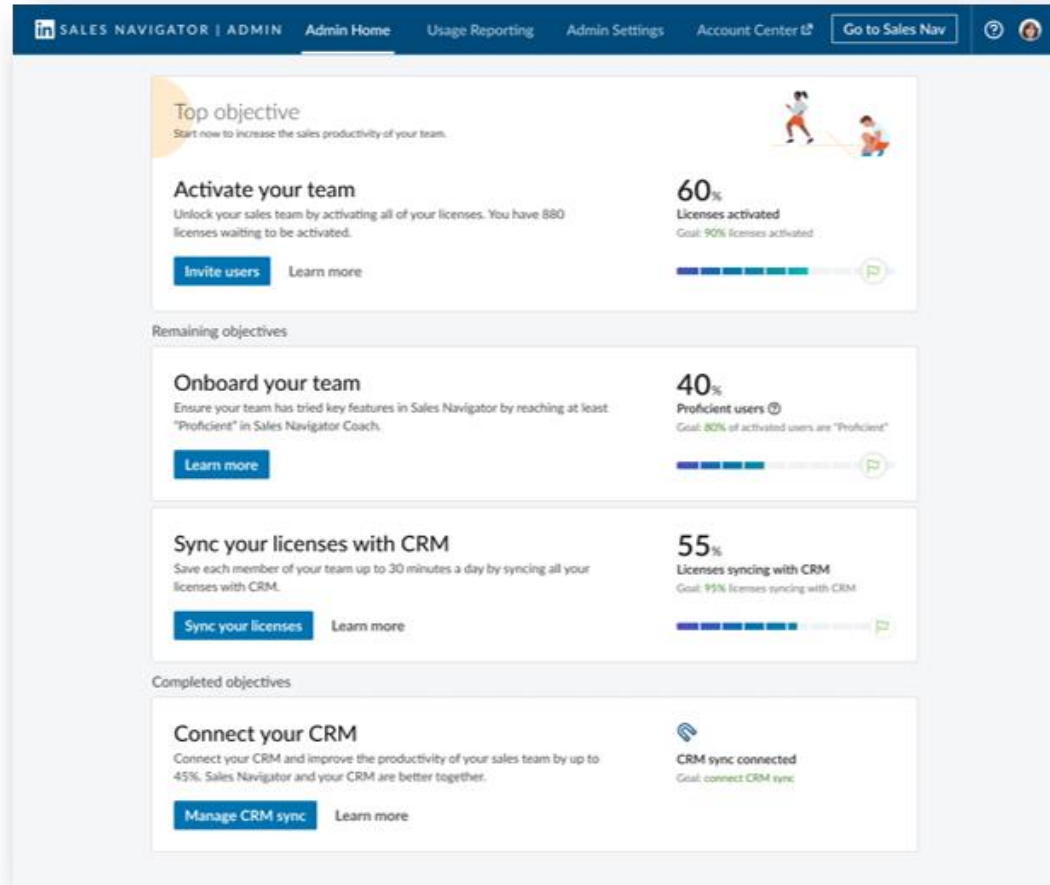
Community Idea

Admin Home

The new base for Sales Navigator admins

What's new?

Admin Home



Goal: The new Admin Home recommends objectives designed to drive sales productivity. It also houses other key admin tools in an updated navigation.

Intended value: Admins get a guided introduction to Sales Navigator to set themselves and their teams up for immediate success and continuous program improvement.

Key objectives:

- **Activate your team:** Reach 90% license activation
- **Connect your CRM:** Turn on CRM sync (if applicable)
- **Sync your licenses with CRM:** 95% of licenses syncing to CRM (if applicable and appears once CRM sync is turned on)
- **Onboard your team:** Have each end-user reach at least "proficient" on Sales Navigator Coach

How it works

- 1 Click "Admin" in the Sales Navigator navigation to reach Admin Home
- 2 Admins then work to complete recommended objectives
- 3 Charts update to show progress towards the recommended success thresholds
- 4 Objectives will become "complete" once the success threshold has been met*

Top objective
Start now to increase the sales productivity of your team.

Activate your team
Unlock your sales team by activating all of your licenses. You have 880 licenses waiting to be activated.

60%
Licenses activated
Goal: 90% licenses activated

[Invite users](#) [Learn more](#)

**The "Activate your team" objective will return to the top if an account purchases additional licenses and drops below the recommended activation threshold*

Sales Navigator Community Updates

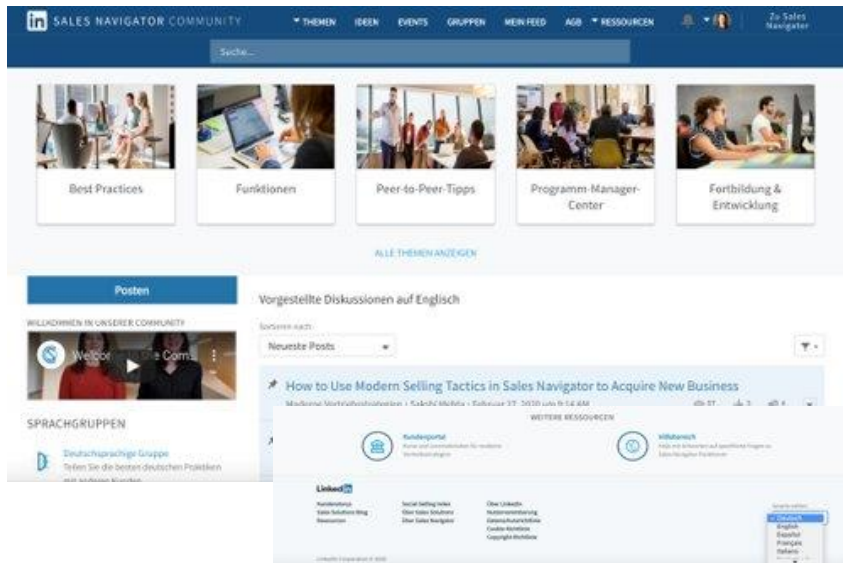
Translation of interface, achievement badges and opening platform to all Teams and Enterprise Edition users



Community Idea

What's new?

Sales Navigator Community Updates



From this quarter onwards:

- We're providing the **Community interface** in all **Sales Navigator-supported languages** (English, Spanish, Portuguese, German, French, Dutch, and Italian) when users change their language preference settings.
- We'll also be offering **achievement badges** when members hit a **Community milestone** or **recognition from Community Moderators** for standout contributions to the conversation.
- The **Community experience** is being opened up to all **Teams and Enterprise Edition users**, so they can share best practices, network, and learn from each others' experiences.

Other Updates



Other Updates

- Global Nav Redesign
 - Introducing an updated global navigation header
- Homepage enhancements
 - All Lead Shared Update alerts will now open into a panel that slides out from the right side of the homepage, allowing you to view and comment on the update without leaving Sales Navigator.
- Account Center Migration for contracts < 50 seats
 - Account Center ramp is resuming for contracts still on Seat Management for contracts with fewer than 50 seats
 - Account Center provides Sales Navigator admins with a new intuitive portal for license management including a better way to create, manage, and organize user groups as well as drive end-user engagement directly with the ability to email users as needed
- CRM Enhancements
 - When setting up CRM Sync, customers now have the option of utilizing CRM Admin credentials with a more customizable set of permission requirements. Note: Utilizing this lower level of permission (“Read Only” access) will not allow for the use of CRM Activity Writeback.
- SNAP Update
 - HubSpot’s Sales Navigator integration now gives users the ability to include LinkedIn connection requests and InMail as Tasks in their HubSpot Sequences