



**LinkedIn**

# Sales Navigator Q3 '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.*




New to Sales Navigator

# Buyer Interest Alerts

Available to Enterprise Edition users

# Buyer Interest Alerts


Available to Enterprise users



**Orbit employees are researching your company** ...

Internet · 51-200 employees  
2 hours

[View Employees](#)



**Telondo leadership are researching your company** ...

Internet · 51-200 employees  
3 hours

[View more](#)

Buyer Interest Alerts provide insight into the attributes of potential buyers when they engage with a user's LinkedIn company page or company website.\*

These alerts will help sellers decide who they should engage with and when to customize the buyer experience.

As a part of our launch, we will introduce two new Buyer Interest Alerts:

- **Employees researching your company**
  - Users will receive an Employee Alert when employees from a saved Account, excluding leadership (VP, CXO, Partner, or Owner Level) views the Sales Navigator user's LinkedIn Company Page or company website
- **Leadership researching your company**
  - Users will receive a Leadership Alert when employees at a saved Account with seniority levels at VP, CXO, Partner, or Owner Level views the Sales Navigator user's LinkedIn Company Page or company website

*NOTE: Alerts display information on the attributes of the potential buyers, we do not share individual information in order to protect buyer privacy.*

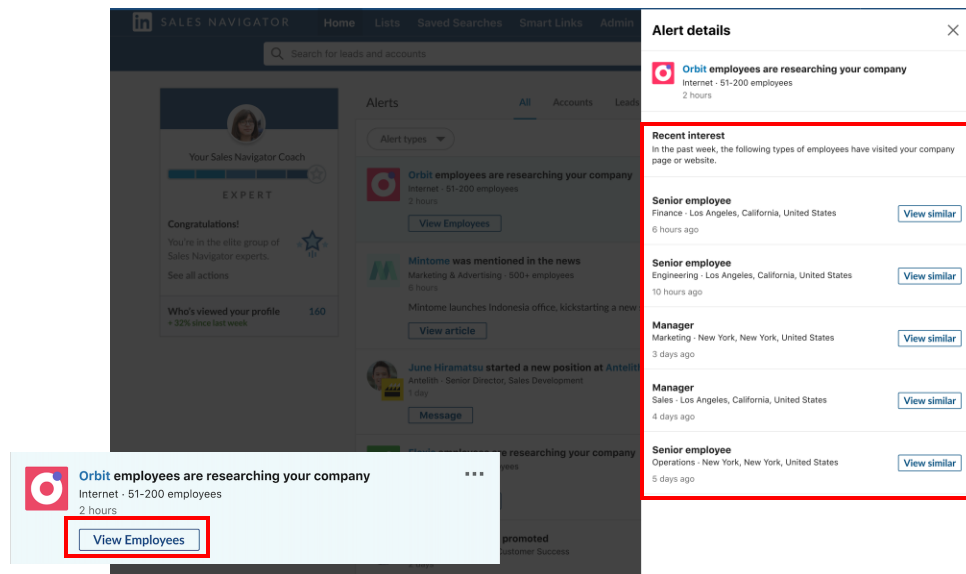
*\*Alerts triggered by company website visits require the LinkedIn Insight Tag on your website. Learn more about Insight Tags [here](#)*



# Buyer Interest Alerts: Employees researching your company

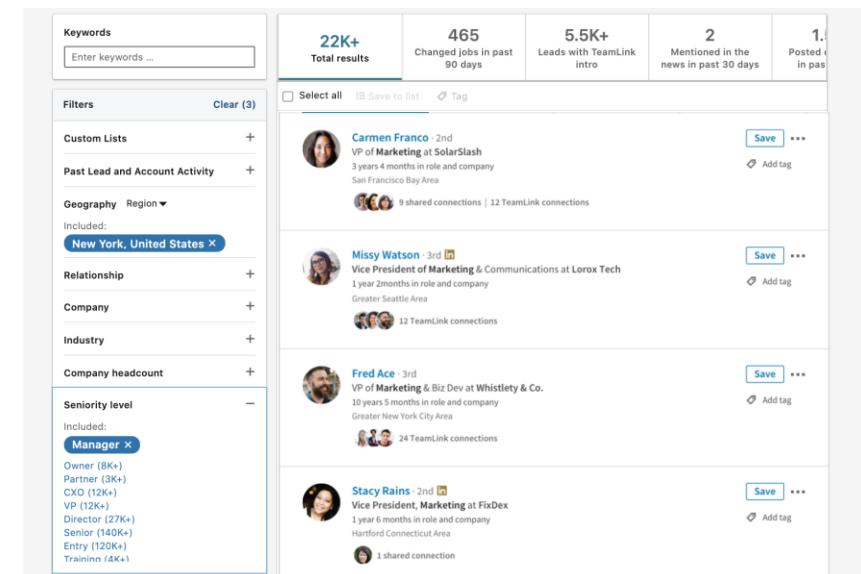
When potential buyers at any level excluding leadership (VP, CXO, Partner, or Owner Level) passively browse product information on a LinkedIn Company Page or vendor's website, users will see an Alert in Sales Navigator signaling activity and providing information on these potential buyer attributes.

How the Alert works:



Select 'View Details' on the Alert to see an aggregate view of potential buyers' seniority level, job function, time stamp, and their geographic locations.

Select 'View More' to run a search that matches the potential buyer's attributes (location, job function, seniority level).



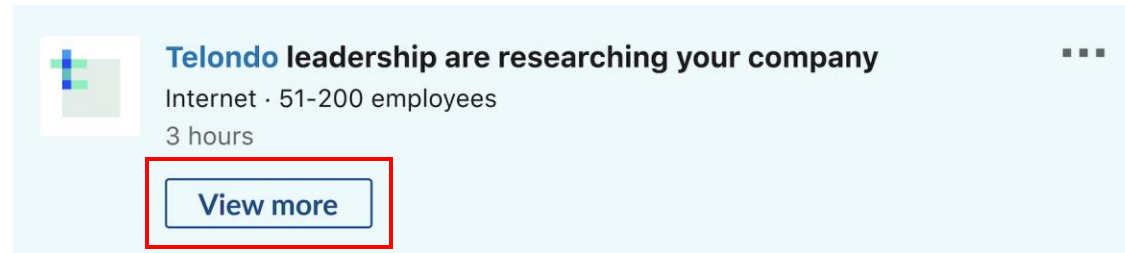
Results will show matches to a potential buyer's attributes (location, job function, seniority level).

*Note: To protect privacy, users will not be able to see an attribute break down if the attribute has fewer than 10 results*

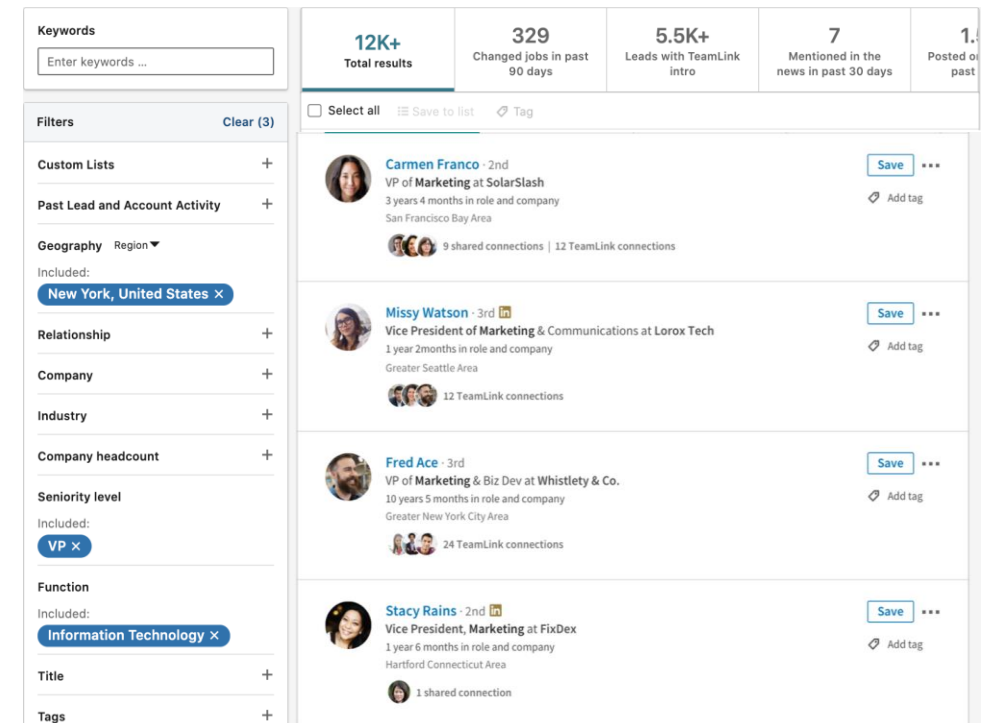
# Buyer Interest Alerts: Leadership researching your company

When potential buyers with seniority levels at VP, CXO, Partner, or Owner Level passively browse product information on a LinkedIn Company Page or vendor's website, users will see an Alert in Sales Navigator signaling activity and providing information on these potential buyer attributes.

How the Alert works:



Select 'View Details' on the Alert to run a search for potential buyers



Search results will show matches to a potential buyer's attributes (location, job function, seniority level).

*Note: To protect privacy, we will not run searches with certain attribute filters (e.g. location, job function, or seniority level) if the filter will lead to fewer than 10 search results*



Community Idea

# Alert Enhancements

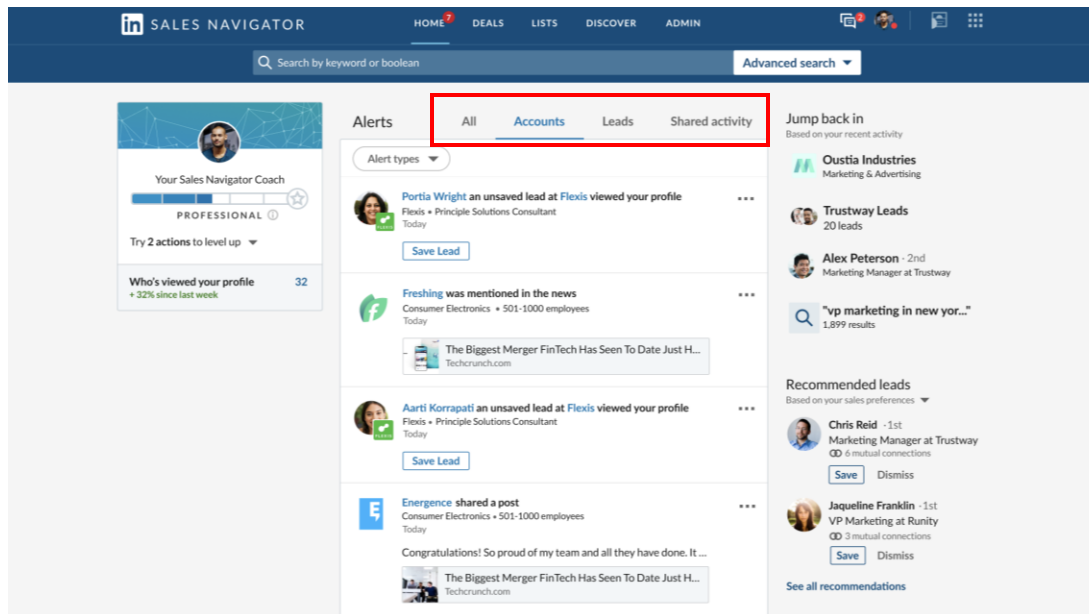
A new way to filter and keep track of Alerts



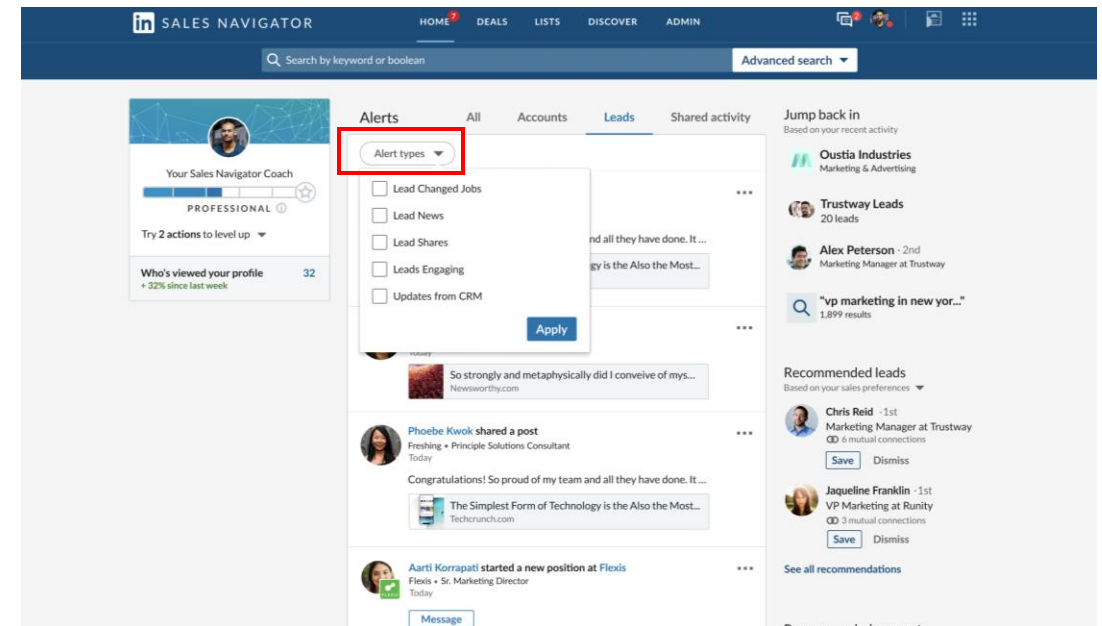
# Alerts Enhancements: Improved Alert tracking and filter results

An enhanced Alert filter experience will allow users to filter by accounts, leads, shared activity, and Alert type. Users will be able to find relevant and useful insights about their saved Leads and Accounts faster than ever.

To filter Alerts:



Choose to filter alerts by accounts, leads, and shared activity within the user's contracts\*



Choose a specific Alert type for even more granular results

*\*Shared activity is only available to Team and Enterprise users*



Community Idea

# List Enhancements

CRM Lists, Outreach Activity, extended limit, bulk actions

# Lists Enhancements: CRM Lists

Available to Team and Enterprise users

The screenshot shows the Sales Navigator interface with the 'Lead lists' tab selected. A search bar at the top allows for finding leads and accounts by keywords or boolean. Below the search bar, there are tabs for 'Lead lists' and 'Account lists'. The 'Lead lists' tab is active, showing a list of saved leads. A blue box highlights the 'CRM' badge next to the 'Auto-Generated: My CRM Accounts' list. A tooltip explains that this list includes key CRM Accounts owned/associated with owned Opportunities, and that users should check with their Sales Navigator Admin for exact rules around which Accounts are displayed. The list shows 34 accounts, with columns for Name, Accounts, Owner, and Last updated. The first entry is 'Auto-Generated: My CRM Accounts' with 34 accounts, owned by Antoine Martel, last updated on 7/14/2020. Other entries include 'Marketing Influencers', 'Marketing Leads', '2019 Prospects', and '2019 Lead List'.

Name	Accounts	Owner	Last updated
Auto-Generated: My CRM Accounts	34	Antoine Martel	7/14/2020 - Sales Navigator
Marketing Influencers		Antoine Martel	2/14/2020 - Antoine Martel
Marketing Leads		Antoine Martel	1/14/2020 - Antoine Martel
2019 Prospects		Victoria Bocker	12/14/2019 - Antoine Martel
Auto-Generated: My CRM Accounts	2	Antoine Martel	7/19/2019 - Sales Navigator
2019 Lead List		Aarti Koorappi	
FixDex Leads		Antoine Martel	

CRM List as displayed in Lead List Hub

The screenshot shows the Sales Navigator interface with the 'Account lists' tab selected. A search bar at the top allows for finding leads and accounts by keywords or boolean. Below the search bar, there are tabs for 'Lead lists' and 'Account lists'. The 'Account lists' tab is active, showing a list of saved accounts. A blue box highlights the 'CRM' badge next to the 'Auto-Generated: My CRM Accounts' list. A tooltip explains that this list includes key CRM Accounts owned/associated with owned Opportunities, and that users should check with their Sales Navigator Admin for exact rules around which Accounts are displayed. The list shows 34 accounts, with columns for Name, Accounts, Owner, and Last updated. The first entry is 'Auto-Generated: My CRM Accounts' with 34 accounts, owned by Antoine Martel, last updated on 7/14/2020. Other entries include 'Flexis', 'Fresh Inc. Sales', 'Minitone, LLC', and 'Auto-Generated: My CRM Accounts'.

Name	Accounts	Owner	Last updated
Auto-Generated: My CRM Accounts	34	Antoine Martel	7/14/2020 - Sales Navigator
Flexis		Antoine Martel	2/14/2020 - Antoine Martel
Fresh Inc. Sales		Antoine Martel	1/14/2020 - Antoine Martel
Minitone, LLC		Victoria Bocker	12/14/2019 - Antoine Martel
Auto-Generated: My CRM Accounts	2	Antoine Martel	7/19/2019 - Sales Navigator
Oustia		Aarti Koorappi	
FixDex		Antoine Martel	

CRM List as displayed in Account List Hub

Lists will generate automatically from a CRM, granting users the ability to access their Accounts, Leads, and Contacts directly in a Sales Navigator List.

- Available only for CRM Sync customers (Microsoft Dynamics Sales 365 or Salesforce)
- CRM Lists will be displayed as a normal List within List Hub, with a grey CRM badge.

# Lists Enhancements: Outreach Activity

The screenshot displays the Sales Navigator interface for a lead list titled "California Qualified Leads". The top navigation bar includes "SALES NAVIGATOR", "Home", "Lists", "Saved Searches", "Smart Links", "Messaging", and "Admin". A search bar and "All Filters" button are also present. Below the navigation bar, the lead list is shown with columns for Name, Account, Geography, Notes, Outreach Activity, and Date added. The Outreach Activity column is highlighted with a red box, and an arrow points to the expanded Activity Log for the lead "Terry Jover".

Name	Account	Geography	Notes	Outreach Activity	Date added
Terry Jover - 3rd VP CRM	Mintome	El Segundo, California, United States	Jyoti Collins Waiting to hear back.	20 minutes ago ✓ Invitation sent	7/10/2020
Neil Gogate - 3rd Brand Experience Director	Antelith	Sausalito, California, United States	Add note	3 hours ago ✓ Message received	7/2/2020
Anna Kwok - 3rd Director of Customer Strategy	GoldenPhase	San Francisco Bay Area	Jyoti Collins Talking to competitor.	19 hours ago	7/1/2020
Michael Sen - 3rd Director of CRM Strategy	Energence	San Diego, California, United States	Jyoti Collins Just closed another rou		
Jim Martel - 2nd Director, CRM	Telendo	Los Angeles Metropolitan Area	Add note		
Samantha Lamb - 2nd Vice President Loyalty	GoldenPhase	San Francisco Bay Area	Add note		
Lori Becker - 3rd		Emeryville, California			

**Activity Log @**

- Terry Jover  
✓ Sent a message to you  
2 hours ago
- You  
✓ Sent a message to Terry  
1 day ago
- Terry Jover  
✓ Sent a message to you  
3 days ago
- You  
✓ Sent a message to you  
3 days ago
- You  
✓ Sent a message to you  
3 days ago
- Terry Jover  
✓ Sent a message to you  
1 week ago
- You  
✓ Sent a message to Terry  
1 week ago
- Terry Jover  
✓ Accepted invitation request  
1 week ago

A new column in a Lead List indicating where a Sales Navigator user and/or their colleagues previously engaged with a specific Lead in Sales Navigator will be added, allowing users to make an informed decision on the best course of action.

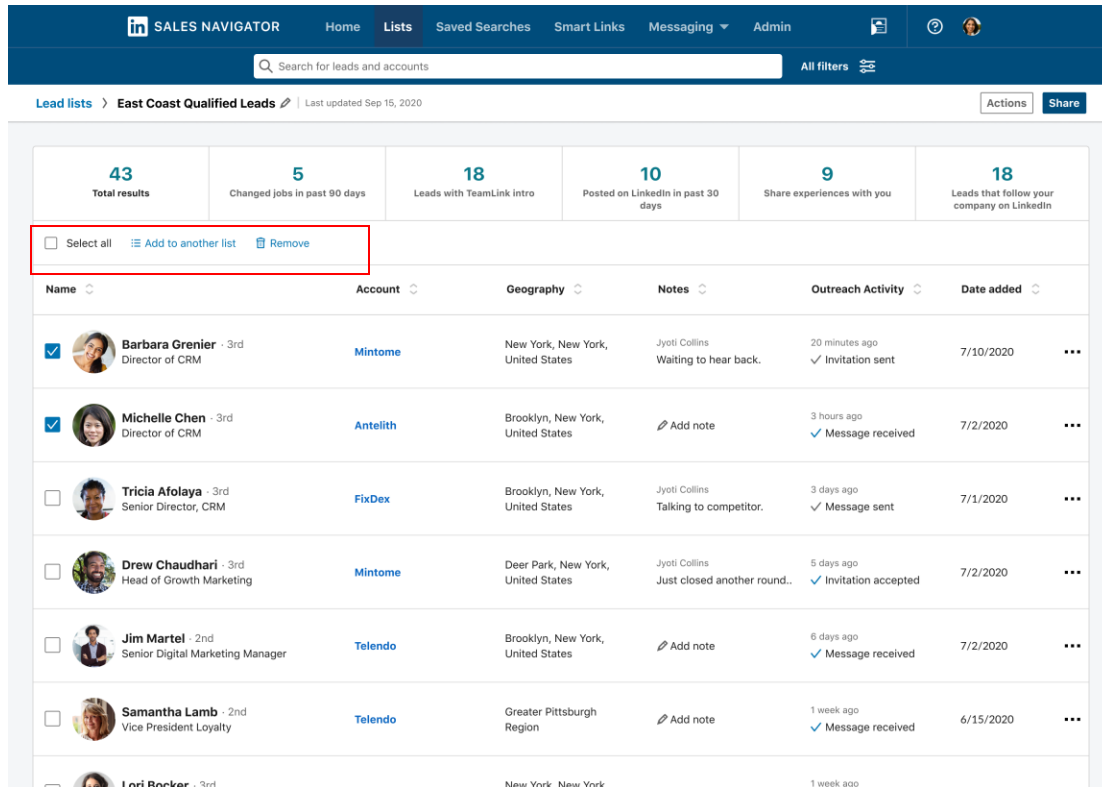
Column will contain:

- InMail and Messages sent by the user from Sales Navigator and LinkedIn
  - Response Received
  - Attachment Clicked
- InMail and Messages sent by the users' colleagues from Sales Navigator
  - Response Received
  - Attachment Clicked
- Connection requests sent by the user from Sales Navigator and LinkedIn
  - Accepted

Select "Add to queue" to add users to the user queue

# Lists Enhancements: Extended limit and bulk actions

Available to all Sales Navigator users



Lead lists > East Coast Qualified Leads | Last updated Sep 15, 2020

43 Total results	5 Changed jobs in past 90 days	18 Leads with TeamLink intro	10 Posted on LinkedIn in past 30 days	9 Share experiences with you	18 Leads that follow your company on LinkedIn
<input type="checkbox"/> Select all <a href="#">Add to another list</a> <a href="#">Remove</a>					
Name	Account	Geography	Notes	Outreach Activity	Date added
<input checked="" type="checkbox"/> <b>Barbara Grenier</b> - 3rd Director of CRM	Mintome	New York, New York, United States	Jyoti Collins Waiting to hear back.	20 minutes ago ✓ Invitation sent	7/10/2020
<input checked="" type="checkbox"/> <b>Michelle Chen</b> - 3rd Director of CRM	Antelith	Brooklyn, New York, United States	<a href="#">Add note</a>	3 hours ago ✓ Message received	7/2/2020
<input type="checkbox"/> <b>Tricia Afolaya</b> - 3rd Senior Director, CRM	FixDex	Brooklyn, New York, United States	Jyoti Collins Talking to competitor.	3 days ago ✓ Message sent	7/1/2020
<input type="checkbox"/> <b>Drew Chaudhari</b> - 3rd Head of Growth Marketing	Mintome	Deer Park, New York, United States	Jyoti Collins Just closed another round.	5 days ago ✓ Invitation accepted	7/2/2020
<input type="checkbox"/> <b>Jim Martel</b> - 2nd Senior Digital Marketing Manager	Telendo	Brooklyn, New York, United States	<a href="#">Add note</a>	6 days ago ✓ Message received	7/2/2020
<input type="checkbox"/> <b>Samantha Lamb</b> - 2nd Vice President Loyalty	Telendo	Greater Pittsburgh Region	<a href="#">Add note</a>	1 week ago ✓ Message received	6/15/2020
<input type="checkbox"/> <b>Lori Bocker</b> - 3rd		New York, New York		1 week ago	

## Extended Lists Limit

Custom Lists will increase the maximum number of leads and accounts in a List from 250 to 1000, this will provide Sales Navigator users additional room as the Lists functionality continues to grow.

## Bulk Actions

To make it easier for Sales Navigator users to manage Lists, we will now support the following Bulk Actions for a Custom Lead or Account List for up to 25 leads or accounts:

- Bulk add to another List
- Bulk remove from a List



Community Idea

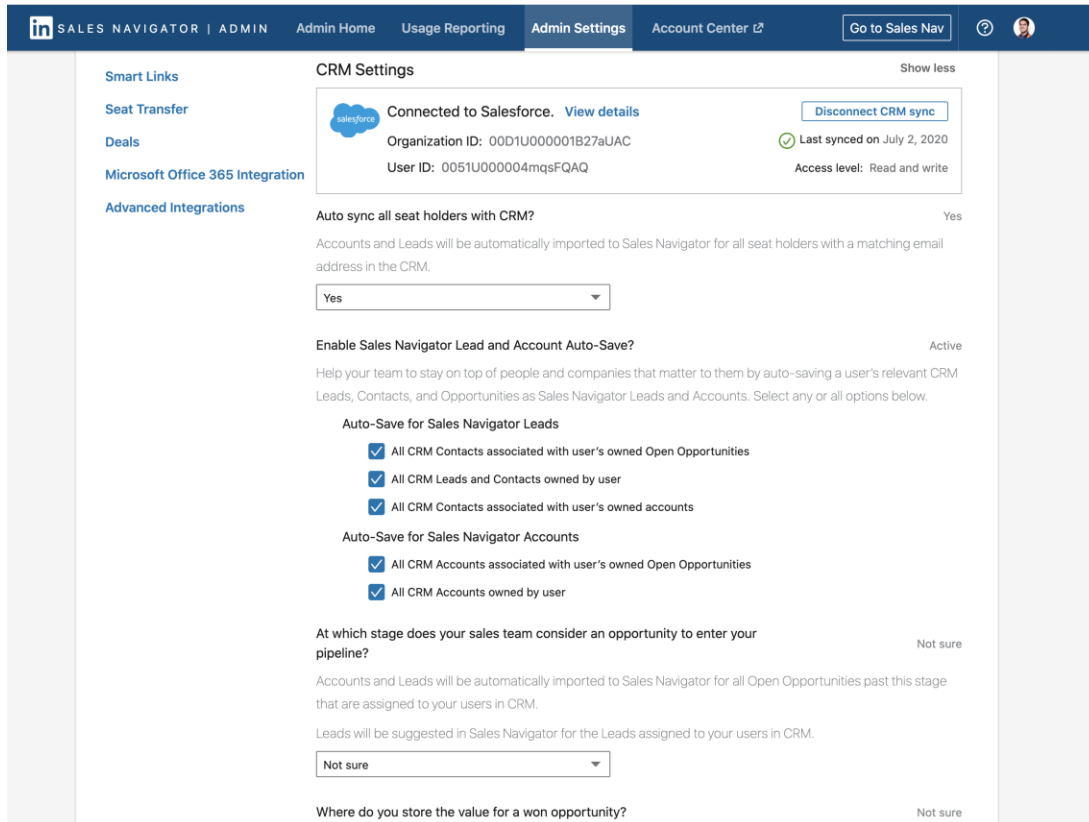
# CRM Enhancements

Available to Team and Enterprise Admin users



# CRM Enhancements: New CRM Sync Auto-Save Settings

Available to Team & Enterprise Edition Admin users



The screenshot shows the 'Admin Settings' page in Sales Navigator. The 'CRM Settings' section is active, displaying a 'Connected to Salesforce' status with a 'Disconnect CRM sync' button. Below this, there are two main settings: 'Auto sync all seat holders with CRM?' set to 'Yes' and 'Enable Sales Navigator Lead and Account Auto-Save?' set to 'Active'. Under 'Auto-Save for Sales Navigator Leads', three checkboxes are checked: 'All CRM Contacts associated with user's owned Open Opportunities', 'All CRM Leads and Contacts owned by user', and 'All CRM Contacts associated with user's owned accounts'. Under 'Auto-Save for Sales Navigator Accounts', two checkboxes are checked: 'All CRM Accounts associated with user's owned Open Opportunities' and 'All CRM Accounts owned by user'. At the bottom, there are two more settings: 'At which stage does your sales team consider an opportunity to enter your pipeline?' set to 'Not sure' and 'Where do you store the value for a won opportunity?' set to 'Not sure'.

CRM Settings

Connected to Salesforce. [View details](#) [Disconnect CRM sync](#)

Organization ID: 00D1U000001B27aUAC ✓ Last synced on July 2, 2020

User ID: 0051U000004mqsfQAQ Access level: Read and write

Auto sync all seat holders with CRM? Yes

Accounts and Leads will be automatically imported to Sales Navigator for all seat holders with a matching email address in the CRM.

Yes

Enable Sales Navigator Lead and Account Auto-Save? Active

Help your team to stay on top of people and companies that matter to them by auto-saving a user's relevant CRM Leads, Contacts, and Opportunities as Sales Navigator Leads and Accounts. Select any or all options below.

Auto-Save for Sales Navigator Leads

- ☒ All CRM Contacts associated with user's owned Open Opportunities
- ☒ All CRM Leads and Contacts owned by user
- ☒ All CRM Contacts associated with user's owned accounts

Auto-Save for Sales Navigator Accounts

- ☒ All CRM Accounts associated with user's owned Open Opportunities
- ☒ All CRM Accounts owned by user

At which stage does your sales team consider an opportunity to enter your pipeline? Not sure

Accounts and Leads will be automatically imported to Sales Navigator for all Open Opportunities past this stage that are assigned to your users in CRM.

Leads will be suggested in Sales Navigator for the Leads assigned to your users in CRM.

Not sure

Where do you store the value for a won opportunity? Not sure

## Admin options on Auto-Saving CRM Leads, Contacts, and Accounts into Sales Navigator

Previously, when Admins enabled CRM Sync, users would have a certain set of their CRM Contact & Accounts auto-saved as Sales Navigator Leads and Opportunities. This was limited to only CRM Contacts & Accounts associated with their open Opportunities.

Now, Admins can select a from a set of options for their team, allowing auto-saving of CRM Leads, Contacts, or Opportunities across various ownership settings. These options exist in the Sales Navigator Admin Settings page (under CRM Settings). They include the ability to select any or all of the following auto-save options for their users:

Sales Navigator Leads (e.g. CRM Leads or Contacts)

- All CRM Contacts associated with user's owned Opportunities
- All CRM Leads and Contacts owned by user
- All CRM Contacts associated with user's owned accounts

Sales Navigator Accounts (e.g. CRM Accounts)

- All CRM Accounts associated with a user's owned Opportunities
- All CRM Accounts owned by user

# Account Center Updates

Available to Admin users

# New in Account Center: Search, Select, Act

Completing bulk actions in Account Center is now faster and more intuitive. Admin users can quickly and easily locate and select up to 2000 users to take immediate bulk actions.

## Search and keep searching

Users can now complete multiple searches to build complex lists before taking an action

## User Queue

Select "Add to queue" to add users to the user queue

Complete actions by opening the User Queue or by using the quick action bar at the bottom

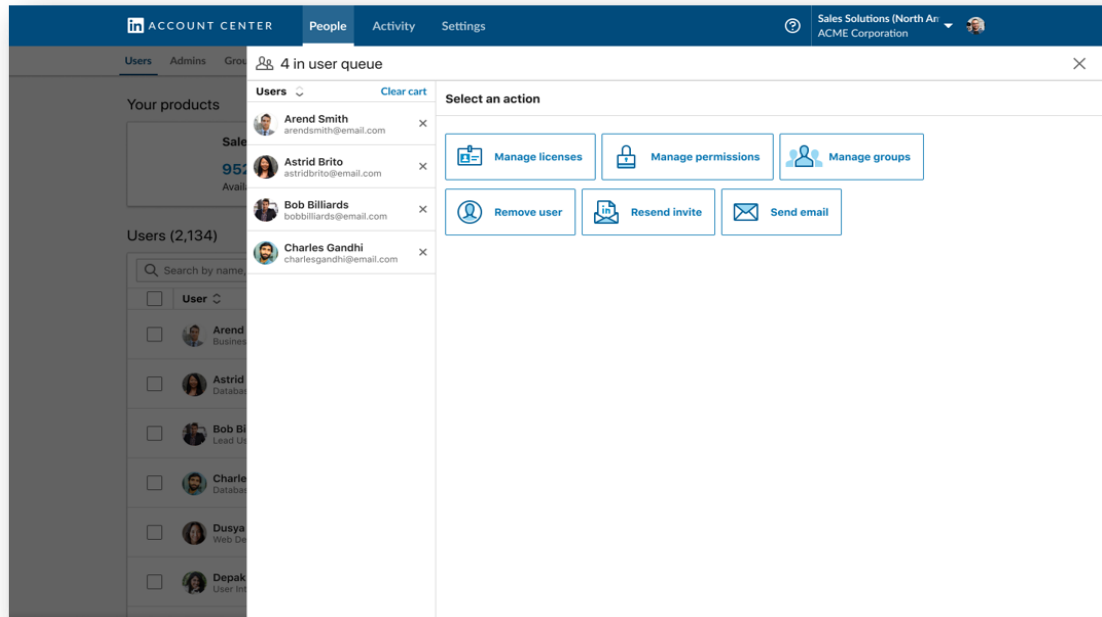
The screenshot shows the LinkedIn Account Center interface. At the top, there's a navigation bar with 'ACCOUNT CENTER', 'People', 'Activity', and 'Settings'. Below this, there's a 'Your products' section with two cards: 'Sales Navigator License' (952 Available, 25 Invited, 23 Activated) and 'TeamLink Extend License' (7,344 Available, 93 Invited, 15 Activated). Below the products, there's a 'Users (2,134)' section. It includes a search bar, a 'Download users as CSV' button, and an 'Add users' button. A table of users is displayed with columns: User, License type, License status, CRM sync, and Groups. The first two users, 'Arend Smith' and 'Astrid Brito', are selected. At the bottom, a quick action bar is visible, showing '2 selected' and an 'Add to queue' button. Below this bar, there are several action buttons: 'Manage licenses', 'Manage permissions', 'Manage groups', 'Remove user', 'Resend invite', and a 'More' dropdown.

User	License type	License status	CRM sync	Groups
<input checked="" type="checkbox"/> Arend Smith Business Systems Analyst	Sales Navigator License	Activated 01/02/2019	On	All users, North American users, California, Headquarters Of..., +2
<input checked="" type="checkbox"/> Astrid Brito Database Administrator	Sales Navigator License	Invited 01/02/2019	Off	All users, North American users, California, Headquarters Of..., +2
<input type="checkbox"/> Bob Billiards Lead User Experience D...	Sales Navigator License	Activated 01/02/2019	On	All users, North American users, California, Headquarters Of..., +2
<input type="checkbox"/> Charles Gandhi Database Administrator	TeamLink Extend License	Invited 01/02/2019	Disconnected	All users, North American users, California, Headquarters Of..., +2
<input type="checkbox"/> Dusya Sigach... Web Developer	Sales Navigator License	Activated 01/02/2019	On	All users, North American users, California, Headquarters Of..., +5

# Taking action using Search, Select, Act

Actions can be taken for the following options:

- **Manager licenses**
  - Apply licenses to users
  - Remove licenses from users
- **Manage permissions**
  - Change user permissions including user, admin, and sub admin
- **Manage groups**
  - Add users to groups
  - Remove users from groups
  - Add users to new groups
- **Remove users**
- **Resend invites**
- **Send email**
  - Send an email to users from a selected email client



# Completing Account Center migration

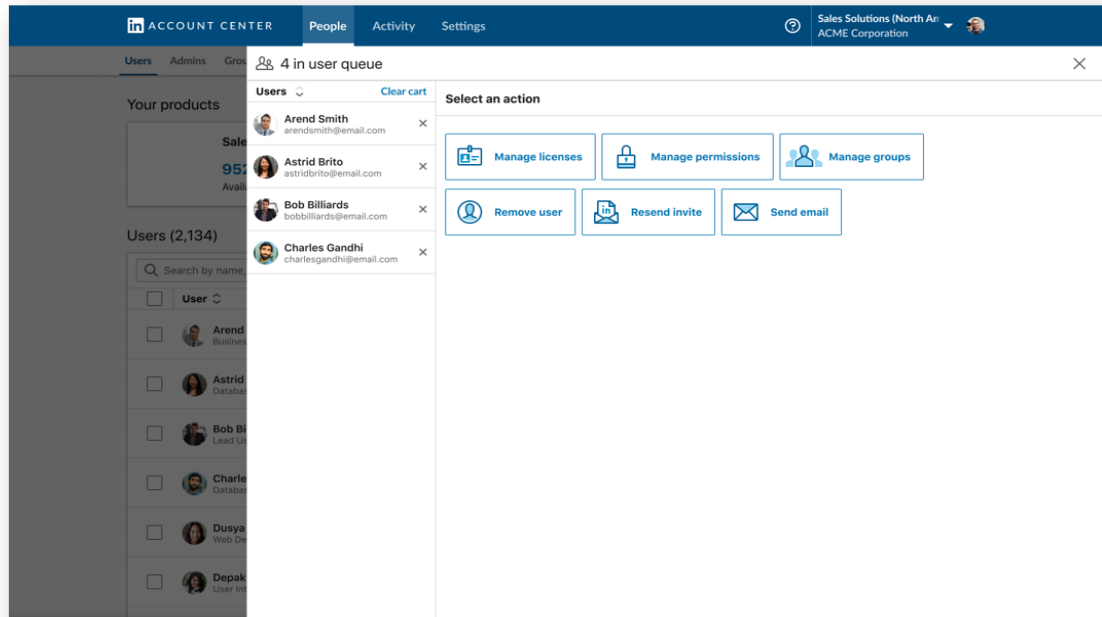
Account Center will finish ramping to contracts still on Seat Management

Please note:

- Ramp will occur concurrently with the final 3 QPR dates
- Ramp will occur by number of contract seats to optimize for admin product usage
- Contracts with <50 seats ramped in CYQ2
- Contracts with 50+ seats will ramp in CYQ3

## Core benefits of Account Center

Empower clients to run more swiftly and effectively by improving license management efficiency, security and scalability, and ultimately, increasing end user engagement.





Community Idea

# Additional Updates



# Additional updates and enhancements

## New Alerts

- **CRM:** Users will be notified when they are assigned as an Opportunity owner of an Account (*CRM Sync required*).\*
- **Account Shared Update:** This highly requested Alert will let users know when a saved Account shares an update, and allow users to like, comment, and share without leaving their homepage.

## Search Enhancements

- **Search Filter Recommendations:** As users apply filters to their search, Sales Navigator will make AI-driven suggestions on additional facets to add next to further improve their results.
- **Location and Account Search:** Improvements to our robust search data set will allow you to be more precise when searching with postal codes or Accounts.

## Alerts Enhancement

- Alerts will now be sorted based on relevancy by default, with the option to sort by chronological order. This will help ensure that the most critical and timely Alerts and updates regarding saved Leads and Accounts are never missed.

## Homepage Enhancement

- Users will have easier access to product help and the option to chat with Customer Support directly from their homepage.

## Mobile Enhancements

- Users will now be able to access search from the universal navigation bar anywhere in their mobile experience. In order to get access to the latest mobile features, they'll need to update their app to the latest [Android/iOS version](#).

# Additional updates and enhancements

## ROI Reporting for Dynamics 365 Sales *(only available to Team and Enterprise users)*

- The ability to view the measurable value of your Sales Navigator program will be available to Microsoft Dynamics 365 Sales customers (CRM Sync required, contact LinkedIn representative for access).\*

## Account Center Admin Updates *(only available to Team and Enterprise admins)*

- The ability to filter users by permission level (user, admin, sub-admin)
- A refreshed “resend invite” action that can now be accessed from the ellipses icon on the user List
- Google authentication support for SSO
- Bulk updating of user permissions via CSV upload

## New Usage Reporting Metrics *(only available to Team and Enterprise admins)*

- Admins can now find "Total Lists Created" in the UI and CSV export, and "Total Leads Saved" and "Total Accounts saved" in the CSV. The latter two metrics are accurate cumulative save counts, rather than measurements of save activities.

## Sales Navigator Coach Updates

- As Sales Navigator continues to evolve, we’re making adjustments to Coach to ensure users are being provided with the guidance they need. Tags will be replaced in Coach by Smart Links. As a result, users may see a change in their Coach (a decrease if they’ve created a Tag, or an increase if they haven’t created one yet).

# Sales Navigator Product Changes

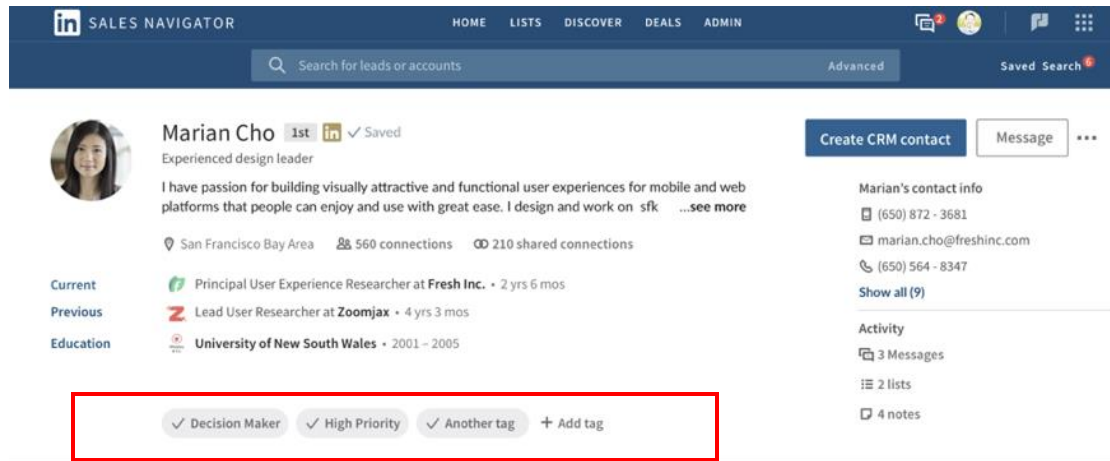
A large circle is centered on the page. The top half of the circle is a light beige color, and the bottom half is a solid blue color. The circle is positioned over a light blue background that covers the bottom half of the image.

# Tags Migration

Applying to Professional, Team, and Enterprise users

# Tags applied to leads and accounts will migrate to Lists

All users

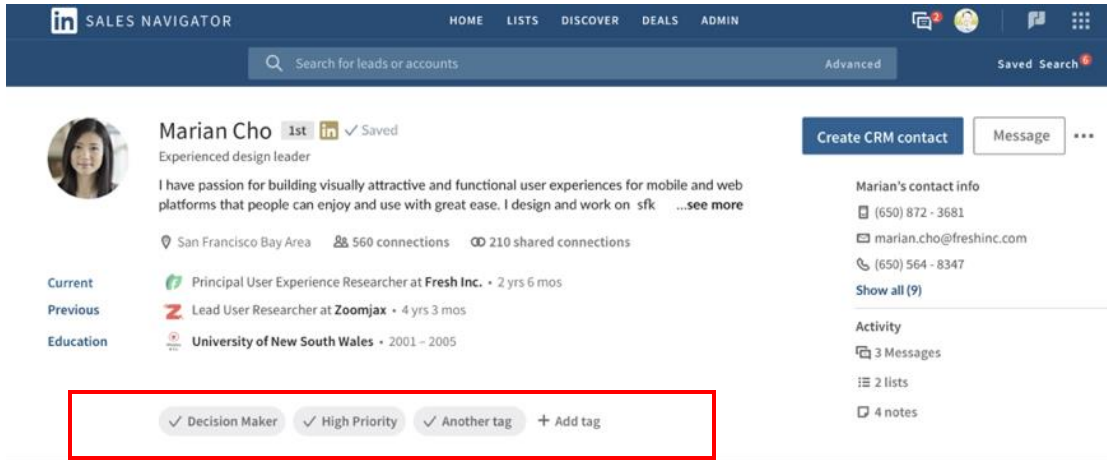


The screenshot shows the LinkedIn Sales Navigator interface. At the top is a navigation bar with 'HOME', 'LISTS', 'DISCOVER', 'DEALS', and 'ADMIN'. Below this is a search bar with the text 'Search for leads or accounts'. The main profile area for 'Marian Cho' is displayed, including her profile picture, name, title 'Experienced design leader', and a brief bio. To the right of the profile are buttons for 'Create CRM contact' and 'Message'. Below the profile information, there are sections for 'Current', 'Previous', and 'Education' roles. At the bottom of the profile, a red box highlights a row of tags: 'Decision Maker', 'High Priority', 'Another tag', and a '+ Add tag' button.

Between August and September 2020, we will migrate Tags applied to Leads and Accounts to Lists.

Lists will 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



## Criteria for Tag migration:

- ✓ Tag value has been applied to a minimum of 10 and a maximum of 1,000 leads or accounts
- ✓ Tag value has been applied within the past year
- ✓ Limited to the 50 most recent tags used on leads and accounts, to introduce a maximum of 50 new lead lists and 50 new account lists

August 2020

Ability to create Tags is removed & Applied Tags will begin migrating over to Custom Lists

September 2020

Tags migration to Lists complete

December 2020

Tags will no longer be available



## Example migration process



Sales Navigator user applies a Tag titled "Decision Maker" to a lead

That same lead will then be transferred to a List titled "Decision Maker"

All leads with the "Decision Maker" Tag will be aggregated under a new "Decision Maker" List

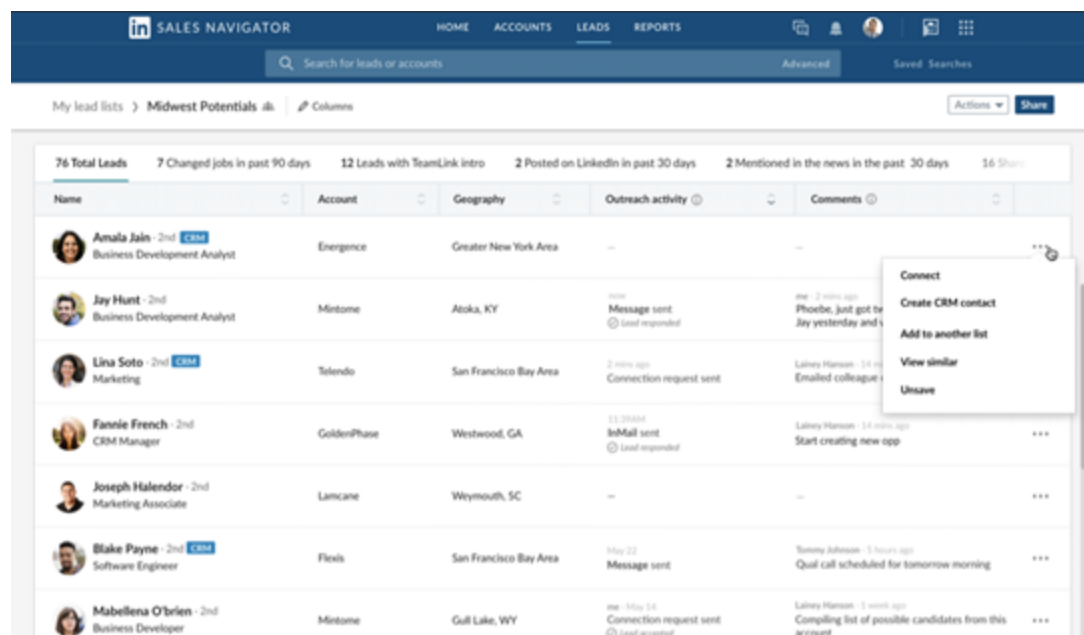
Share new "Decision Maker" List with colleagues

# Deals Transition

Applying to Team and Enterprise users

# Deals will transition into a streamlined solution

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 and account mapping functionality in Sales Navigator (coming soon)

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