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.

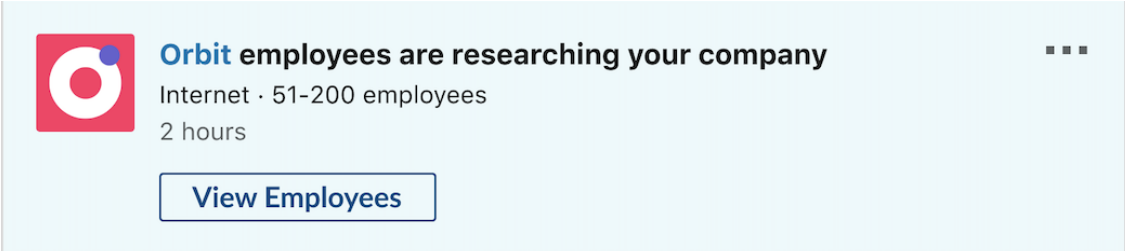
New to Sales Navigator

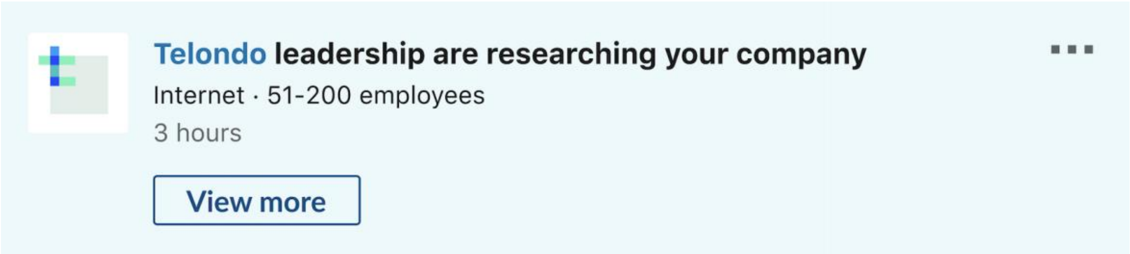
Buyer Interest Alerts

Available to Enterprise Edition users

Buyer Interest Alerts

Available to Enterprise users





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

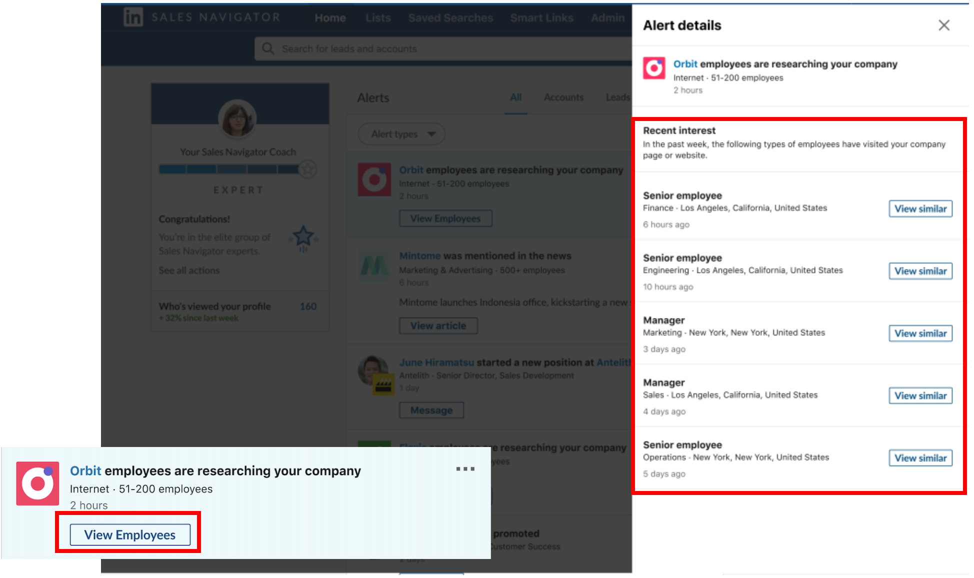
NOTE: Alerts display information on the attributes of the potential buyers, we do not share individual information in order to protect buyer privacy.

**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

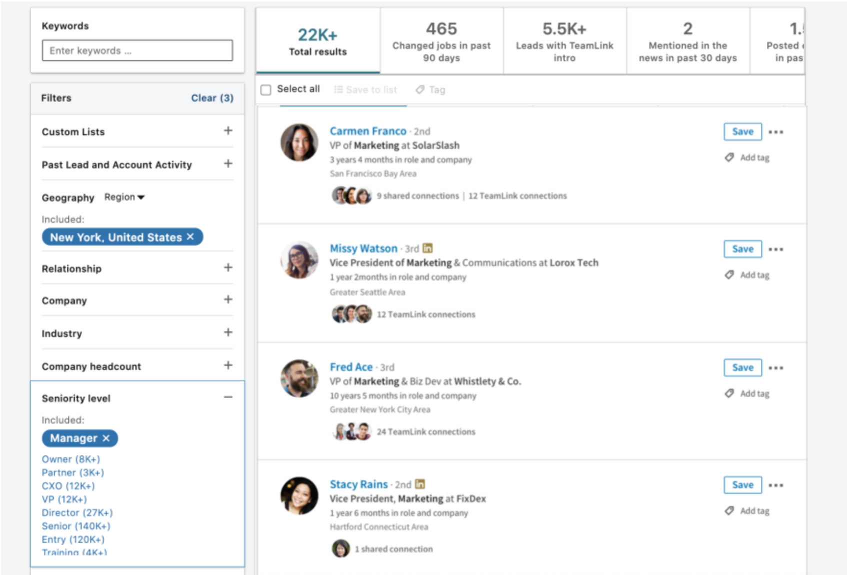
When potential buyers at any level excluding leadership (VP, CXO, Partner, or Owner Level) passively browse product information on a LinkedIn Company Page or vendor's website, users will see an Alert in Sales Navigator signaling activity and providing information on these potential buyer attributes.

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).



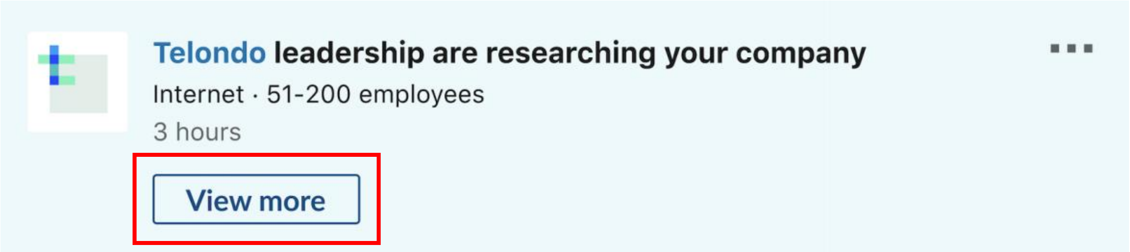
Results will show matches to a potential buyer's attributes (location, job function, seniority level).

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

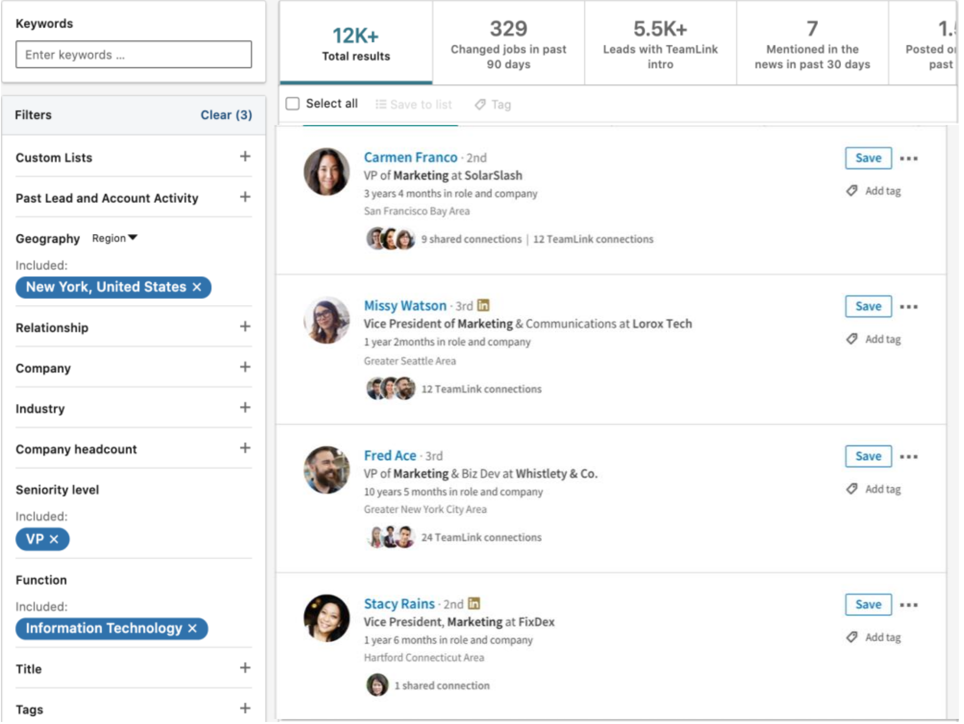
Buyer Interest Alerts: Leadership researching your company

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

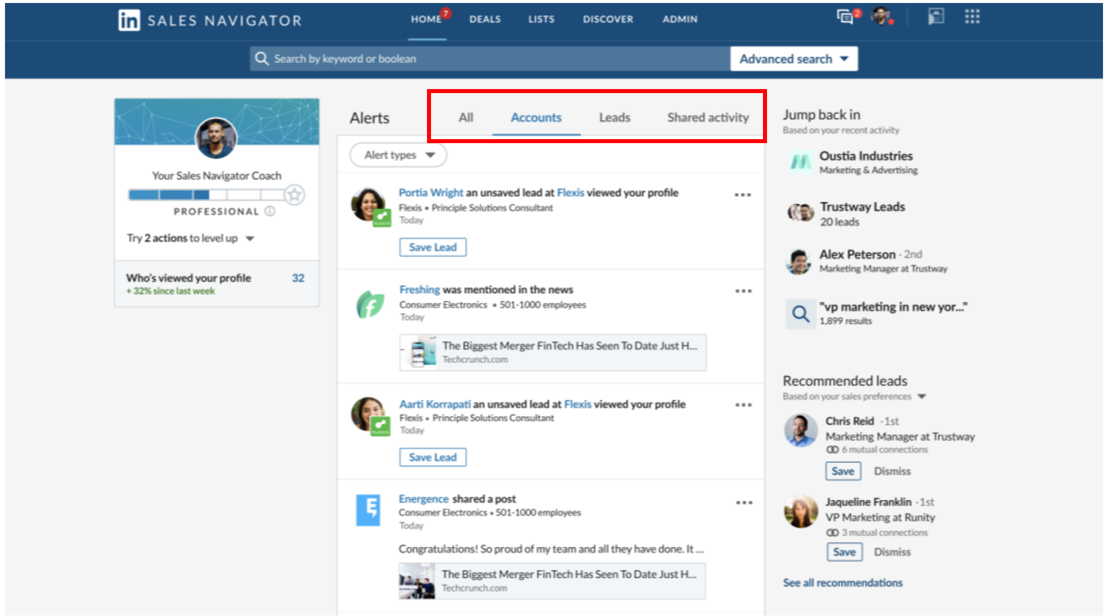
Alert Enhancements

A new way to filter and keep track of Alerts

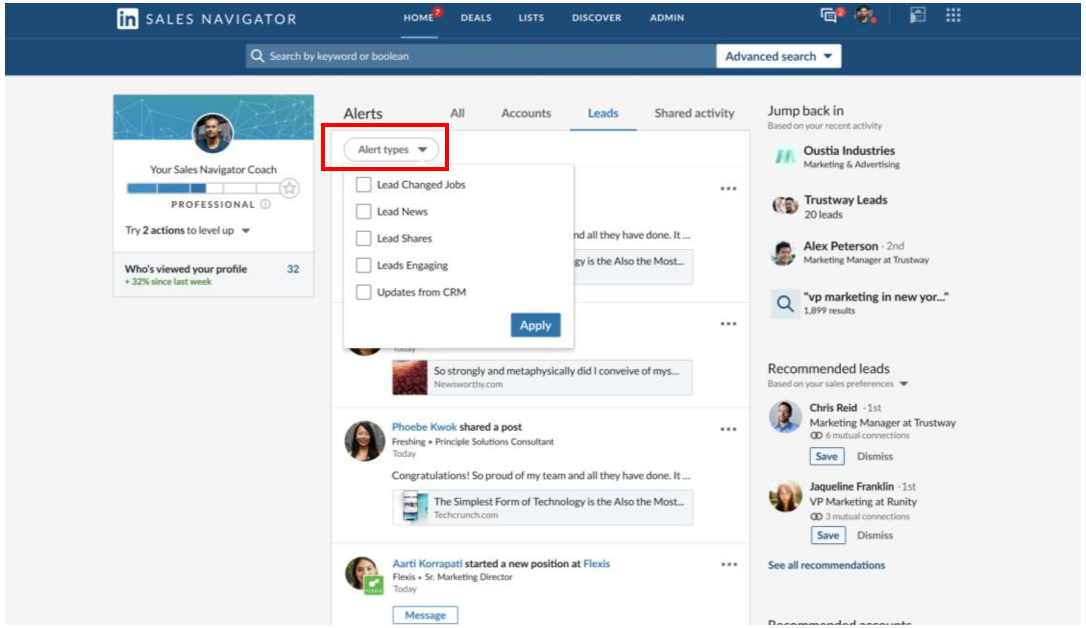
Alerts Enhancements: Improved Alert tracking and filter results

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*

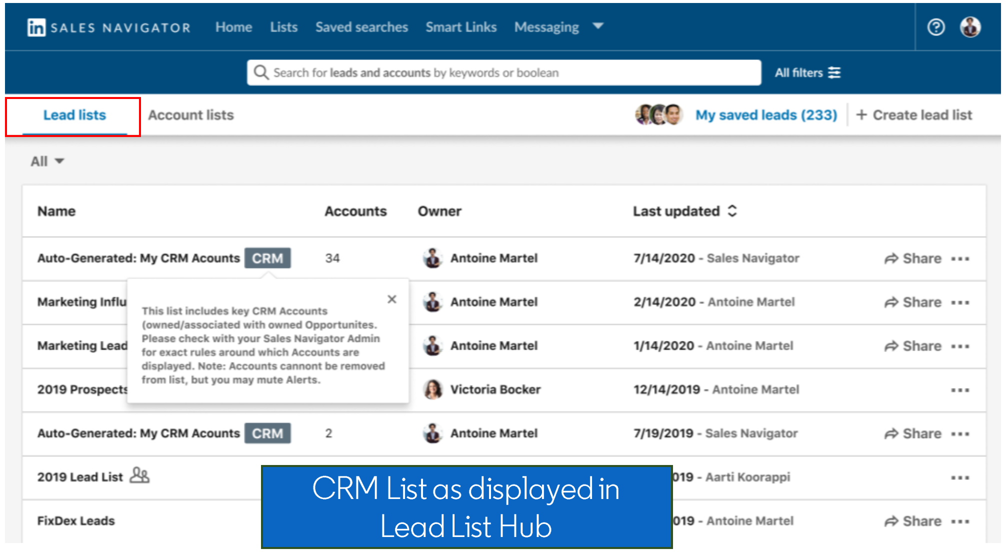
Community Idea

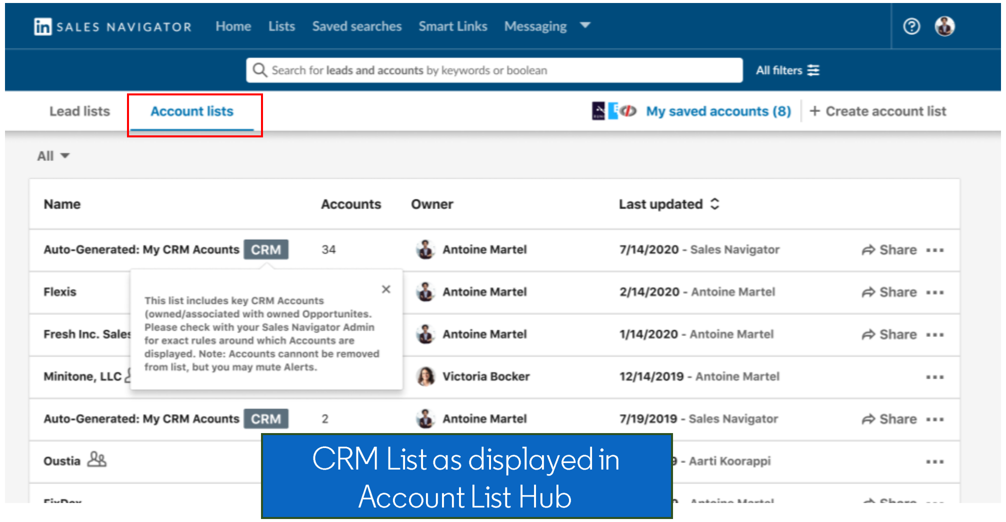
List Enhancements

CRM Lists, Outreach Activity, extended limit, bulk actions

Lists Enhancements: CRM Lists

Available to Team and Enterprise users

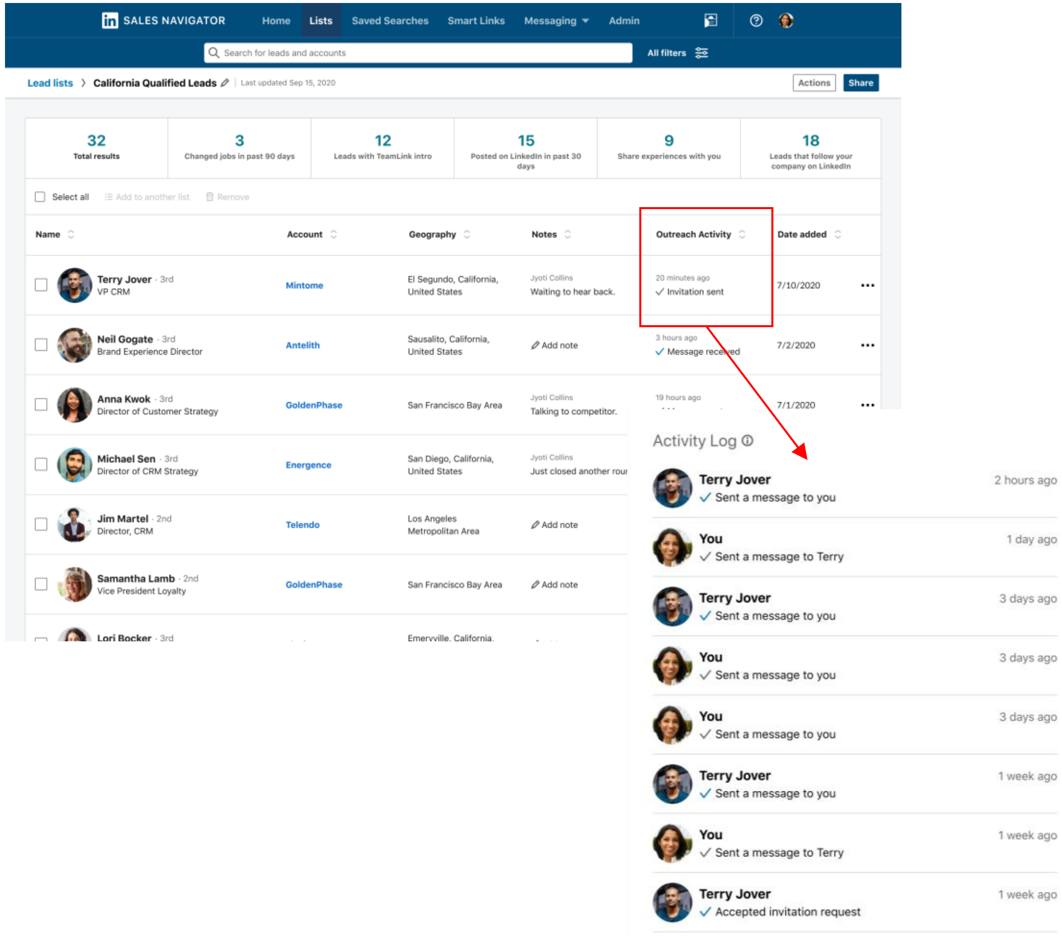




Lists will generate automatically from a CRM, granting users the ability to access their Accounts, Leads, and Contacts directly in a Sales Navigator List.

- 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



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.

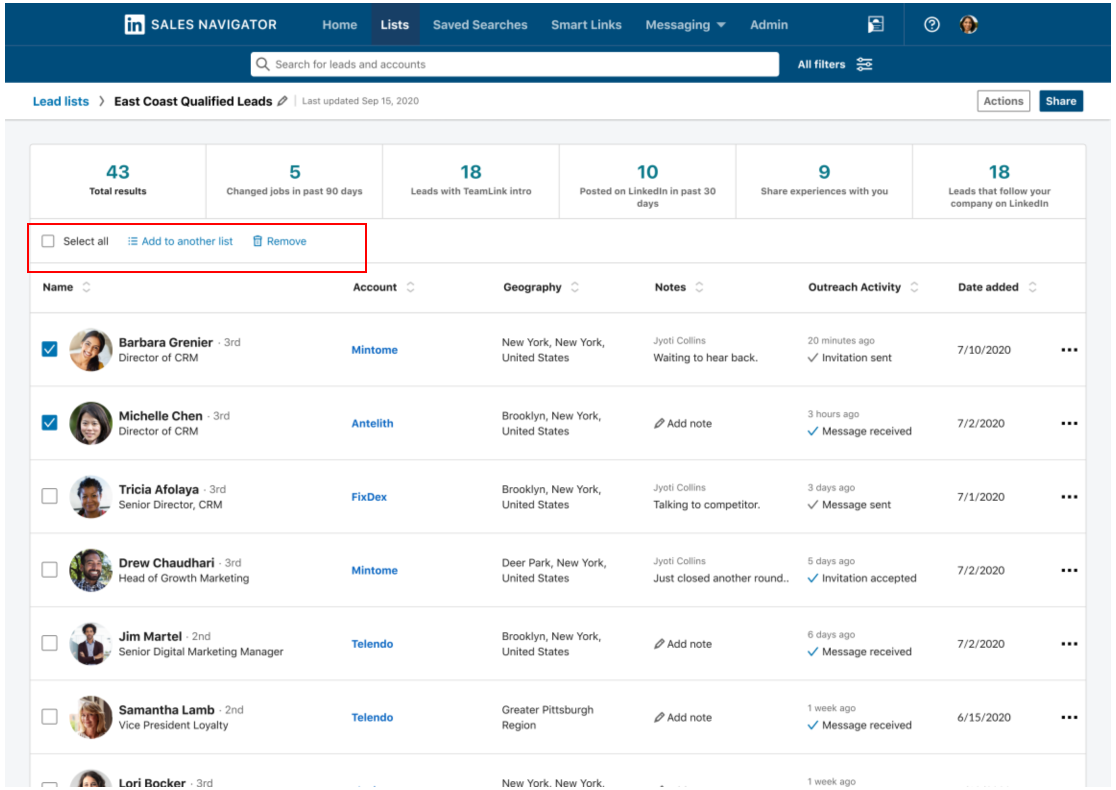
Column will contain:

- 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



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

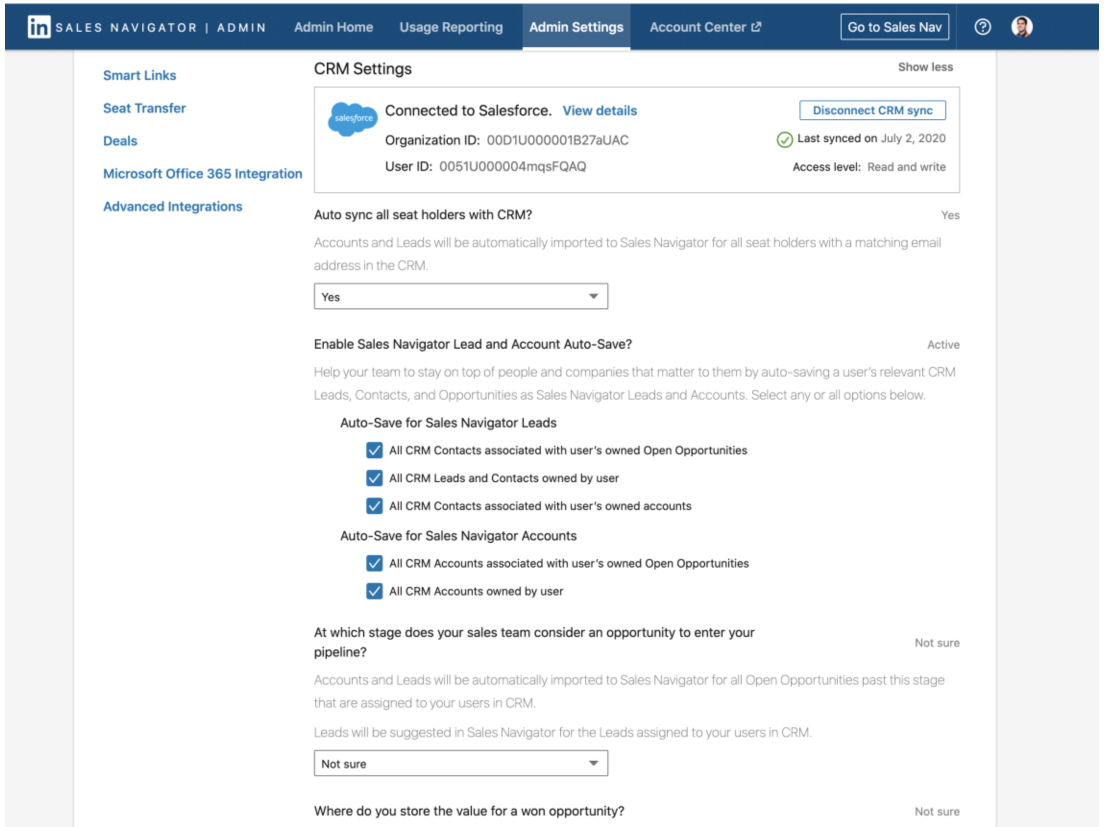
Community Idea

CRM Enhancements

Available to Team and Enterprise Admin users

CRM Enhancements: New CRM Sync Auto-Save Settings

Available to Team & Enterprise Edition Admin users



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

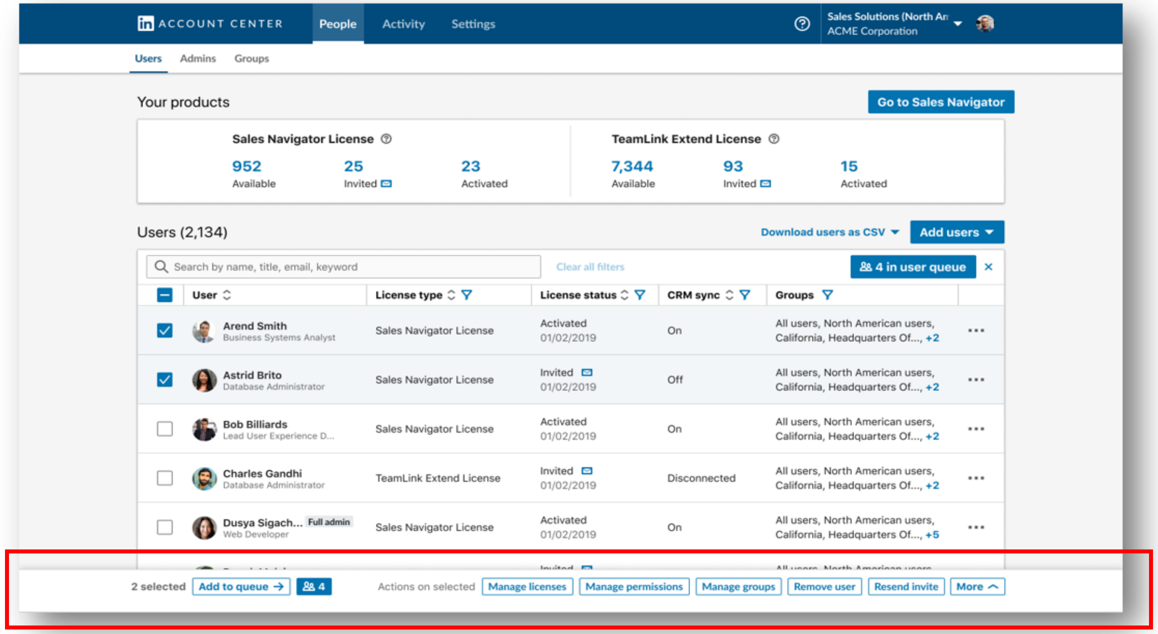
Sales Navigator Accounts (e.g. CRM Accounts)

- 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

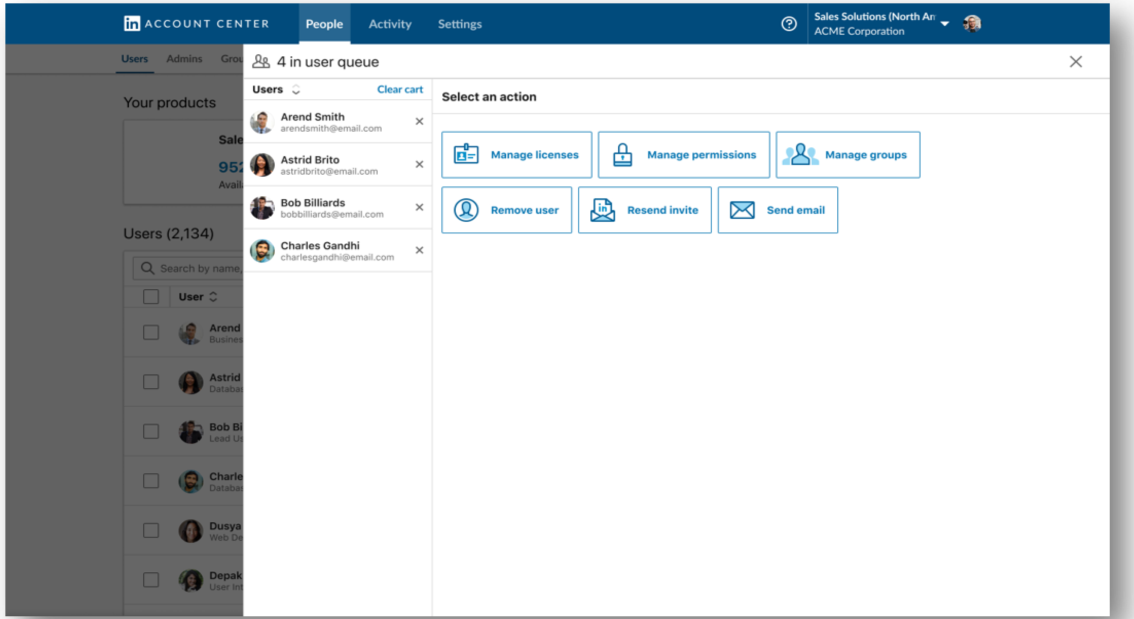
Users can now complete multiple searches to build complex lists before taking an action

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

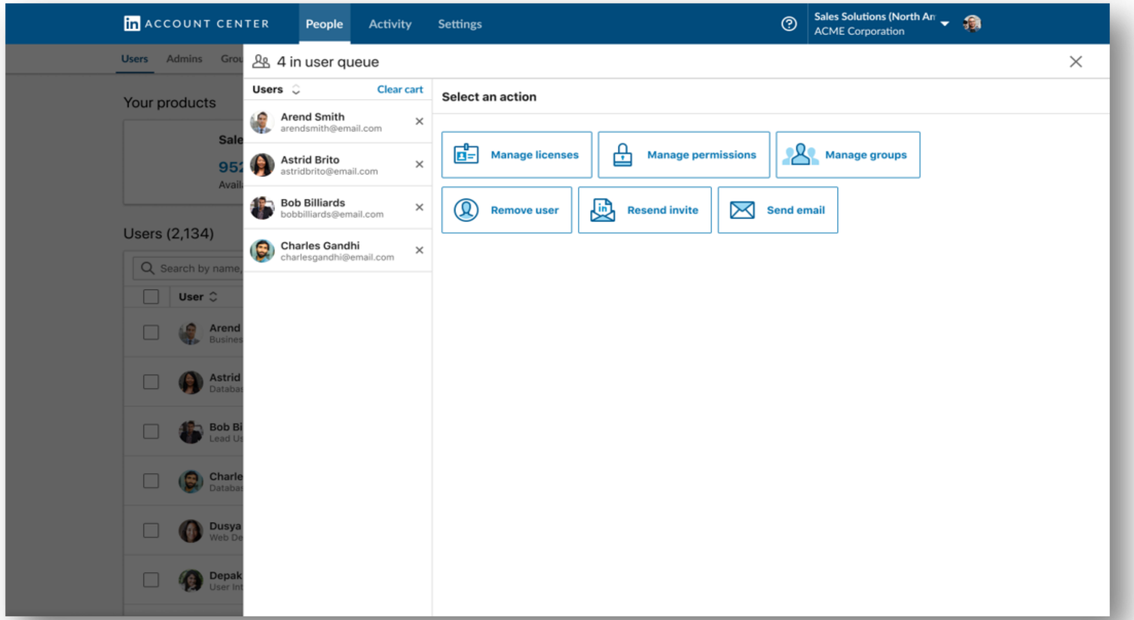
Taking action using Search, Select, Act



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).

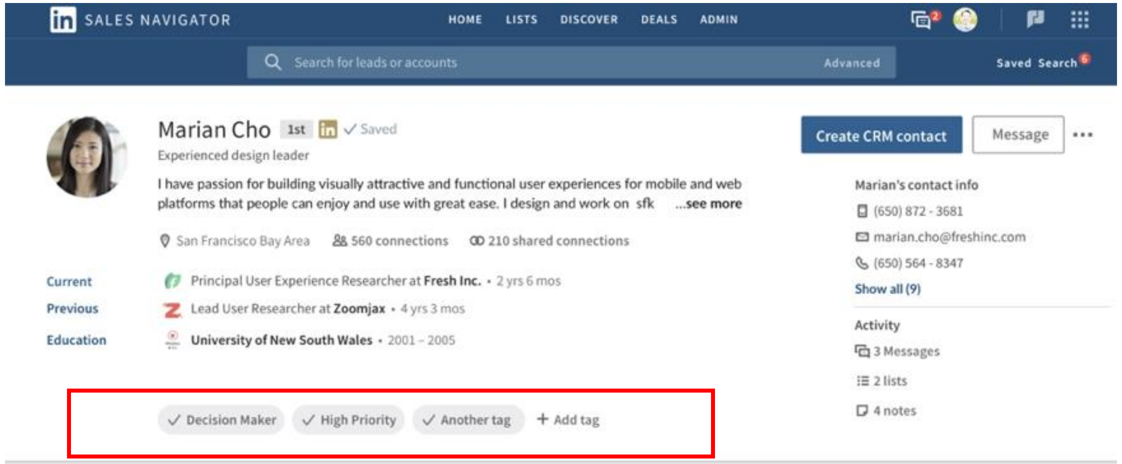
Sales Navigator Product Changes

Tags Migration

Applying to Professional, Team, and Enterprise users

Tags applied to leads and accounts will migrate to Lists

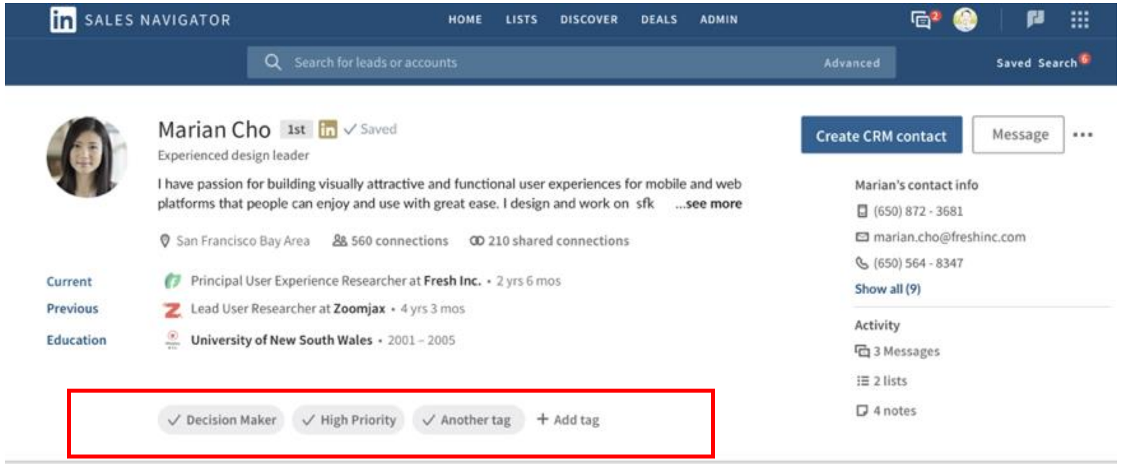
All users



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 compete

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

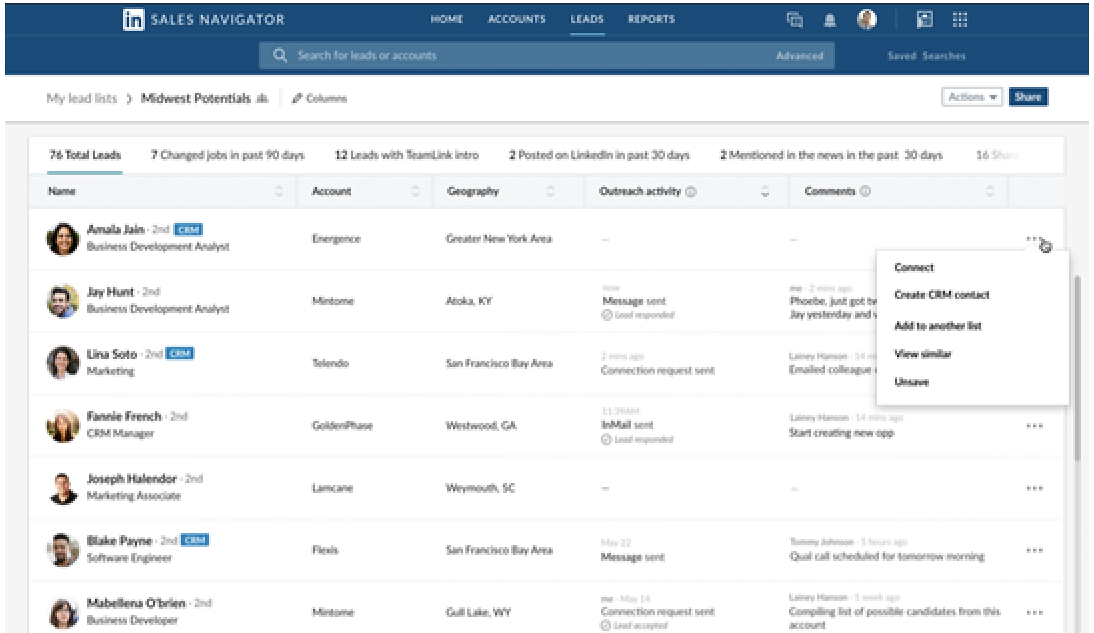
Share new “Decision Maker” List with colleagues

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