

LinkedIn Sales Navigator helped Marsh unify their global sales force



Location: New York, NY
No. of Employees: 45,400 | Industry: Financial Services



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Rongling You
SVP, Global Sales & Client Engagement, Marsh



Challenge

Tracking changes on a global scale

- Global insurance broker and risk advisor Marsh works with sophisticated corporate risk professionals. Being able to identify, track, and connect with these individuals is key to Marsh’s sales success.
- Marsh recently streamlined their Sales Navigator program across nine regions. To bring these diverse teams together in a unified approach, Senior Vice President of Global Sales & Client Engagement Leader Rongling You sought a solution that met the goals of all stakeholders: “Our goal is to provide a consistent user experience for everybody across the world. Having a consolidated global program only helps with that.”
- Within this unified approach, the sales team needed a solution that enabled identifying buying circles, tracking people movement to different companies, and building strong relationships.



Solution

A data powered integration

- Sales Navigator provided the right tools, global reach, and CRM connectivity to meet Marsh’s goals: consolidating sales processes across regions, increasing customer connectivity, and creating greater efficiency in building a sales pipeline.
- By integrating Sales Navigator with Salesforce, Marsh’s CRM platform, Veldsman saw an immediate increase in efficiency on the sales team. “Whereas before we found prospects by driving around in industrial areas and writing down names, we now use Sales Navigator and in minutes we have identified prospects by industry, company size, etc. It is much more efficient.”
- JD Veldsman, Managing Director, Pacific Head of Growth and Digital, Marsh, shares, “People movement is massively important for us. If the person you’ve been working with is moving from one business to another, having Sales Navigator connected to our CRM keeps us updated immediately. From a tech stack perspective, it massively enhances our CRM.”



Results

Sales connections that drive opportunities

- Veldsman explains how the shift from names on a spreadsheet to working within Sales Navigator impacted his team. “Sales Navigator allows you to visualize the pipeline and connect faces to names. Suddenly our colleagues were having discussions about events taking place in our customers’ lives, and reaching out to connect with them on LinkedIn enabling deeper connections and the opportunity to build relationships.”
- One connection, in particular, resulted in an astounding opportunity. Veldsman shares the story: “It started as a challenge between two members of the sales team. We’d been trying to get in front of this specific business owner for quite some time, and one day they were in the paper. With Sales Navigator, our colleague discovered one of his contacts had recently moved to the targeted business. He connected with them and was able to arrange a meeting. We ultimately won an insurance bid from that customer on a huge construction project!”

23%

uplift in deals sourced with
LinkedIn Sales Navigator

32%

uplift in pipeline sourced with
LinkedIn Sales Navigator

332%

uplift in Decision Maker engagement with
LinkedIn Sales Navigator

Tools that influence revenue

- The success of Marsh's sales teams can be directly linked to their use of Sales Navigator. "I can clearly see a correlation between business revenue and the people who are using Sales Navigator successfully," shares Veldsman. "It helps the sales teams in terms of keeping their pipelines managed."
- The ability to create and track custom lead lists keeps Marsh's sales teams on track for success. Veldsman adds, "Lists keep us apprised of

what's happening in terms of customer news, job movement, and other significant changes, so we can reach out or respond and demonstrate that we are invested in our customers."

- Veldsman's team uses TeamLink to enable warm introductions across their organization. "We're connectors and storytellers. We connect the dots in terms of our client's needs. TeamLink makes warm introductions possible."

Unified sales made easy

- Unifying nine sales regions was a big undertaking, but Marsh accomplished it by streamlining processes under a tool with a proven track record and global presence. Rongling You spearheaded this endeavor. "By unifying under a global Sales Navigator program, we were able to get the most out of the tool and therefore meet our goals of driving more new business while retaining more clients."
- The sales teams that onboarded mentor those that followed. Veldsman's team was one of those early adopters. "When the other teams started using Sales Navigator, we were able to share some of our insights and stories with them about how we use it and offer tricks of the trade for how it works best for our company."



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