# Linked in

Visible Alpha Strengthens Relationships with Sales Navigator in the Fast-changing Financial Services Space



## 🕵 visible alpha

Location: New York, NY No. of Employees: 800+ | Industry: Information Services



"LinkedIn is the go-to for financial services and any professional that wants to maintain some sort of network."

### Luke Johnson Senior Client Success Manager at Visible Alpha





#### Tracking clients in a fast-paced industry

- Visible Alpha is a financial technology firm that partners with premier investment research organizations to provide a platform for investment research and data analytics, offering deep insights to investment professionals across hedge funds and asset management companies.
- There can be a great deal of flux within the financial services industry, with analysts and portfolio managers moving between firms. Thus, Visible Alpha needed to find a way to track customers across career transitions and to maintain relationships with prior clients.
- Additionally, with a target audience inundated with messages daily, it was important for the team to find an avenue to be able to reach the right individuals at the right time.





#### Deep insights on the platform

- In order to maintain critical working relationships, Visible Alpha turned to Sales Navigator. With the platform, they were able to leverage a wealth of insights and tools.
- With large books of clients, lists and alerts automate the process of tracking significant career changes. "LinkedIn Sales Navigator provides you with current information about your target market," shares Tahir Matak, Institution Sales at Visible Alpha. "One of the platform's benefits is the ability to monitor changes in your client's job status." LinkedIn Sales Navigator also provides employee headcounts, which is valuable in targeting specific clientele.
- Luke Johnson, Senior Client Success Manager, notes how Sales Navigator has been instrumental in maintaining contact with clients as they move between firms. "If a client has left their previous firm and I don't have their personal email, I'll send them an InMail on LinkedIn and connect with them that way."
- The degree of personal connection available through messaging on the LinkedIn platform has helped Visible Alpha develop deeper client relationships. Erin Gifford, Global Head of Marketing, shares, "Sales Navigator is great for building relationships. There's a human element to LinkedIn that email doesn't offer."



"Sales Navigator is a powerful tool to engage with clients and potential clients. I have found that the level of engagement achieved through this platform is significantly higher than traditional methods of communication."

Tahir Matak Institutional Sales at Visible Alpha



### Results

#### Uninterrupted contact with clients

- As someone focused on client experiences, Johnson understands the value of using a sales tool that is embedded in the world's number one professional platform. "For financial services, Sales Navigator is a no-brainer. Everyone uses LinkedIn because it's the number one professional site for people in financial services. There's really nothing else like this for professionals."
- Relationship-building has long been a cornerstone of good sales practice. Sales Navigator enables it in a meaningful way, observes Matak. "Sales Navigator is a powerful tool to engage with clients and potential clients. I have found that the level of engagement achieved through this platform is significantly higher than traditional methods of communication."



of revenue generated by reps using Sales Navigator was influenced by LinkedIn.

#### Insight in action

- Users of Visible Alpha have proven to be effective evangelists for LinkedIn. Maintaining uninterrupted relationships is an essential part of the Visible Alpha sales strategy.
- Recently, a target buyer left a hedge fund, and Sales Navigator flagged the change in a timely manner to ensure the team was up to date.
  Visible Alpha was then able to maintain contact via InMail while the client waited to start their new role.
- When the client started at the new hedge fund, they told others about Visible Alpha and opened a new sales opportunity, all sparked by an automated and scalable process.

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