



GUARDIAN®

“Reps who use Sales Navigator earned 16% more clients, sold 11% more policies, and increased their average premium sold by 2.5x.”

Beth Wood
VP & Chief Marketing Officer, Individual Markets, Guardian

📍 LOCATION:	New York, NY
👤 NO. OF EMPLOYEES:	5,001 – 10,000
🏢 INDUSTRY:	Financial Services

Guardian strengthens their portfolio with Sales Navigator

About Guardian

Guardian offers life insurance, disability income insurance, annuities, and investment management for individuals, as well as workplace benefit packages for businesses. In operation for more than 150 years, Guardian takes the long view in helping people protect their families and assets, plan for retirement, and build legacies for generations to come.

When referrals are no longer enough

Previously, Guardian’s financial advisors developed new business primarily by relying on referrals from contacts within their personal networks. But these networks tapped out quickly, forcing reps to purchase lead lists, which offered little information about the contacts they’d be cold-calling.

These challenges weren’t unique to Guardian – according to LIMRA (Life Insurance Marketing & Research Association), the success rate for insurance reps in their first four years is only 9%. Determined to find a better approach, the agency marketing team at Guardian sought more efficient ways to help advisors expand their reach. “Our advisors

are at their best when they’re directly interacting with potential clients – that’s when their experience and expertise shines through. So we needed to create a more reliable funnel to connect them with a broad audience who would value their advice and experience,” says Beth Wood, VP and CMO for Individual Markets at Guardian. “Social selling with LinkedIn Sales Navigator gives our team the opportunity to build networks, build their brand, and build authority in the online space.”

Results driven by Sales Navigator



11%

more policies sold



16%

more clients



2.5X

year-over-year increase in average premium sold

Expanding networks through social selling

With Sales Navigator, Guardian was able to breathe new life into the referral process, helping their advisors

uncover connections that aren't typically found with traditional tactics. "If I know someone who works at a target company, I can go into Sales Navigator and get a list of everyone else at that company within seconds," says Chuck Villano, a financial professional at Guardian. These secondary connections provide advisors with more opportunities – and warm introductions – than purchased lists. "Sales Navigator makes us smarter about who we're targeting, so it's not a 'luck-of-the-draw' referral process," says Wood.

Sales Navigator's granular search capabilities also help Guardian find entirely new leads. For example, by searching for all CFOs within a 10-mile radius, reps can quickly create a database of high-potential leads. "With just the click of a button, our team can find the exact people they want to work with – people they previously didn't know existed," says Nate Isaacson, Head of Social Selling at Guardian.

The right insights to build real relationships

Once a lead has been identified, Guardian advisors use the prospect's profile information to qualify the lead – a process the team calls "intelligent networking." "Sales Navigator helps us take the intelligent networking process to the next level," says Wood. "Advisors no longer have to build their network solely around financial planning." Instead, the team can now connect with prospects based on common interests – like shared hobbies and groups – and build real relationships. "Friends become clients, and

clients become friends," says Isaacson. "Sales Navigator helps our advisors expand their networks, and over time, build their business."

Additionally, the Guardian team saves leads within Sales Navigator to get alerts on prospects' profile changes, providing advisors with new reasons to stay in touch – and new info to help build credibility. "If a lead just published an article," says Villano, "I can reach out and discuss the content with them. If they've just changed companies, I can check in and see if they need anything."

Greater engagement, bigger sales

Digging into the data, Guardian quickly discovered that advisors who actively use Sales Navigator sold more products overall than non-users. Sales metrics revealed that advisors who regularly engage with the platform earned 16% more clients, and sold 11% more policies over the past year. These users also increased their average premium sold by 2.5x. These stats translate into real dollars: Guardian's high-performing social sellers are bringing in roughly \$50,000 more in sales each year than advisors not taking advantage of the program.

As a company that helps people protect their assets, the Guardian team knows a good investment when they see it. So it's no surprise they plan to expand their use of Sales Navigator even further, helping them secure their own future with broader networks and greater revenue.



In their own words

The key features of LinkedIn Sales Navigator for Guardian:

INCREASING SALES EFFICIENCY

"Time is money – and Sales Navigator rewards us with both."



Nate Isaacson
Head of Social Selling

BUILDING RELATIONSHIPS THROUGH INSIGHT

"We can learn a lot about our prospects from their Sales Navigator updates, which can be used to warm up those high-potential opportunities."



Chuck Villano
Financial Professional

FORMING REAL CONNECTIONS AND TRUST

"Sales Navigator helps us connect with potential clients in a way that goes beyond the sale – it helps us find ways to help each other."



Beth Wood
VP & Chief Marketing Officer

Identifying new leads, building stronger relationships, and moving more product with Sales Navigator

Guardian's financial advisors use Sales Navigator to expand their networks, connect with new prospects, and ultimately, sell more policies.

Check out sales.linkedin.com to learn more about Sales Navigator.

