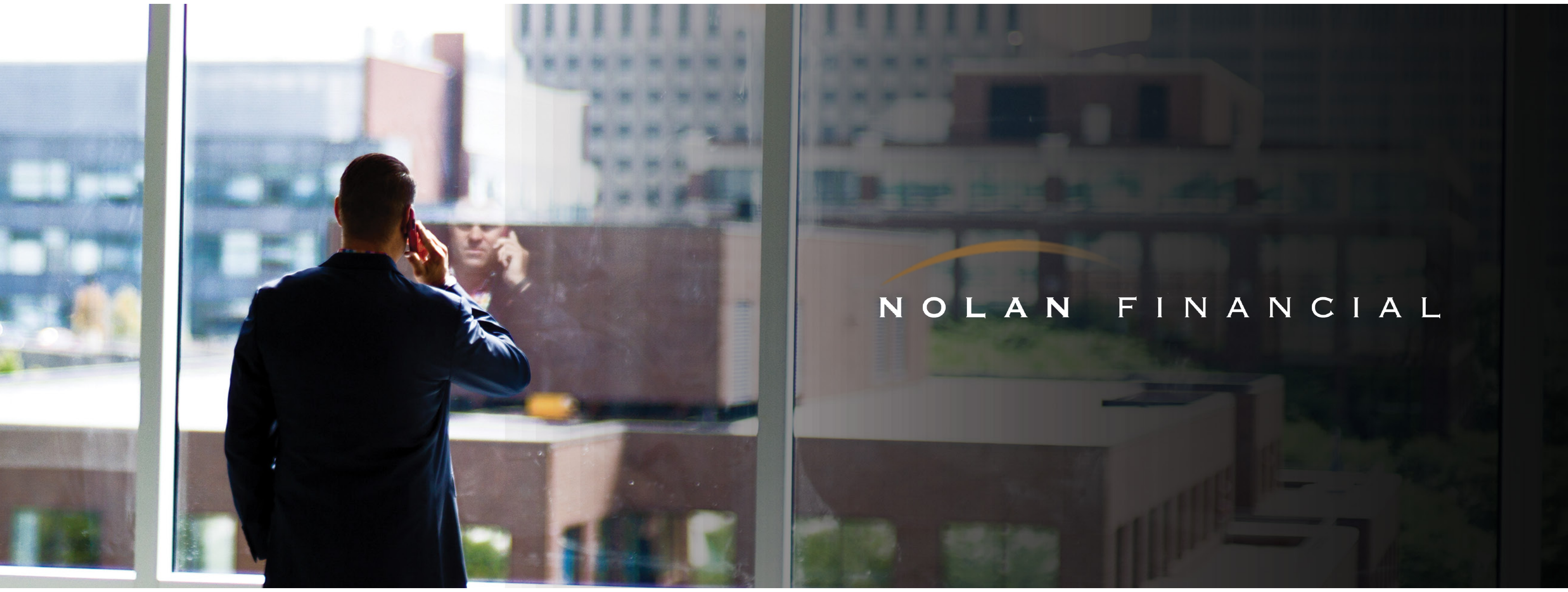

About Nolan Financial

With over 26 years of experience, Nolan Financial is a consulting firm specializing in executive benefits, with a focus on the custom design, funding, enrollment and ongoing record keeping of non-qualified deferred compensation plans as well as bank-owned life insurance. Nolan Financial clients range from tax-exempt to Fortune 200 organizations, spanning all sectors including healthcare, technology, consumer goods, construction and financial services. Independent and privately owned, Nolan prides itself on its industry leading expertise and experience and high-tech, high-touch service. Nolan Financial is based outside of Washington, D.C., with an administrative center in Dallas, Texas.

Who are the target audience?

Nolan Financial offers B2B products and services, but does not market directly. Instead, they wholesale to top financial advisors with close relationships with to top institutions. While the institutions are the ultimate recipients of Nolan Financial's solutions, its marketing efforts are primarily directed towards the financial advisors who serve them.

What was the sales challenge?

"The people that we market to and work with are the advisors and brokers that have relationships with institutions," explains Richard Essig, VP of Corporate Strategy and Development for Nolan Financial. "But one of our marketing challenges is finding–with pinpoint accuracy–financial advisors with relationships to the key decision-makers at our targeted institutions."

Serving a niche market via advisors, Richard's team struggled to generate new leads on demand. With few ways of accessing viable prospects on their own, they had to sit back and wait for advisors to bring opportunities to them.

They needed a way to uncover new leads by starting with the decision makers at target institutions, then moving backwards to find advisors with whom they were connected. Sales Navigator turned out to be the perfect solution: using Sales Navigator, Richard's team could proactively seek out the connections between advisors and institutions, allowing them to reveal new leads with ease.

What about the results?

When Richard's team deployed Sales Navigator, the results were immediately encouraging. Suddenly, Nolan Financial was able to do something unique in its business–develop new leads by beginning with research on the target institutions. Instead of waiting for financial advisors to call, Richard and his team could pick up the phone and immediately add value as a partner to the advisors by uncovering opportunities proactively. It's a unique approach that sets Nolan Financial apart from other financial services providers.

"Traditionally, we would educate advisors on our products and services and wait for the leads to come in," says Richard. "Now we can call an advisor and say, 'Hey. We've just learned that you have a connection to this company, which is an excellent target. Do you have some time to talk about whether or not this is an opportunity?' This outreach is always met with a surprised and positive response. They'll say, 'How did you figure this out?'"

Richard's team has the numbers to back it up. Since introducing Sales Navigator, Nolan Financial has seen its leads skyrocket—a pipeline increase of over 70%. Sales Navigator isn't just empowering the team to find new prospects, either—it's finding the highly qualified ones. In 2014, only 25% of the prospects they evaluated were solid ones worth pursuing. Since deploying Sales Navigator, that number shifted to 85%.

"Now we're not spinning our wheels with bad prospects," says Richard. "Instead of waiting for leads to come in, we're proactively going out and delivering the good ones to our partners, and as a result, are shifting the entire financial wholesaling model."

In their own words: The key benefits of LinkedIn Sales Navigator for Nolan Financial

Finding the right people:

"At Nolan Financial, we're not using Navigator to market directly. We're using it to identify the partners that are connected to the institutions that we want to market to. And that's where Sales Navigator has been so unique for us."

Establishing new connections with InMail:

"If there's a top advisor that I want to build a relationship with, I can simply send an InMail and say, 'Hey, we'd love to work with you.'"

Building strong relationships:

"When we combine our own targeting with Sales Navigator, we're finding qualified leads because we've already done the homework. And the responses we're getting are incredible."

Seeing instantaneous results:

"From a pipeline standpoint, and from a value-add standpoint with our partners, everything across the board has lit up with Sales Navigator. It's just been phenomenal."

Richard Essig
VP of Corporate Strategy and Development

Check out **lnkd.in/sales-navigator** to learn more about Sales Navigator

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