



**WELLS  
FARGO**

**ADVISORS**

*“We launched a Sales Navigator pilot program with our next generation advisors and saw immediate success. The group outperformed our target goals across the board and has acquired 24 new clients so far.”*

Chris Diskin  
VP, Digital Marketing, Wells Fargo Advisors

📍 LOCATION: St. Louis, MO

👤 NO. OF EMPLOYEES: 20,000+

🏢 INDUSTRY: Financial Services

## Creating Connections and Driving Value at Wells Fargo Advisors with Sales Navigator

### About Wells Fargo Advisors

As one of the largest investment firms in the United States, Wells Fargo & Company non-bank affiliate Wells Fargo Advisors helps investors create strategies to help maximize their financial success. To grow and maintain their relationship-driven business, the company's 14,500+ financial advisors\* rely on the rapport and trust they develop with clients.

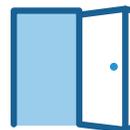
### Creating and sustaining relationships with Sales Navigator

With a vast network of advisors serving clients in all 50 states, Wells Fargo Advisors needed new business opportunity and relationship solutions to support the needs of a range of professionals. Sales Navigator presented the company with a unique proposition: the ability to help new advisors identify potential relationships while simultaneously supporting senior advisors in staying on top of their extensive networks.

Wells Fargo Advisors decided to implement Sales Navigator with its next generation advisors program,

with impressive results: in a survey, 74% of advisors said Sales Navigator enabled them to reconnect with an existing client and 57% said it helped them start a conversation with a potential new client.

### Results driven by Sales Navigator in the first year



712

new client opportunities



\$4.22 MM

in new client assets



24

new clients onboarded

### Tangible and intangible benefits

Right from the start, Sales Navigator began helping Wells Fargo Advisors to establish credibility with new clients and reengage with existing ones.

“Many of our newer advisors are using Sales Navigator in a systematic way and connecting with people they

\* Data as of June 30, 2017, and is a combination of Wells Fargo Clearing Services, LLC (including its predecessor firms) and Wells Fargo Advisors Financial Network, LLC.

would have never met otherwise,” said Devin DeStefano, Program Director, Next Generation Talent - Field.

Experienced advisors are partnering with newer advisors to tap into Sales Navigator, allowing them to grow in new ways. Jack Fleming, Senior Vice President, Investment Officer, noted, “I have a capacity limit, but I still want to expand existing relationships and bring in new prospects.” He and Jodi Timmons, a Wells Fargo Advisors Financial Advisor, are using LinkedIn’s TeamLink to do just that. Timmons added that Lead Builder has been an especially valuable tool to help her narrow her search and find the right contacts.

These internal partnerships are also enhancing the relationships between advisors. “Sales Navigator has given us an intangible benefit,” said DeStefano. “It’s helping the advisors in our apprenticeship program build trust and camaraderie with each other. That’s important for the long-term health of the business.”

### Innovative use of Sales Navigator leads to industry award

Sales Navigator has proven to be such a successful tool for Wells Fargo Advisors that the group was recognized with a Social Media Leadership Award

from Wealthmanagement.com for its next generation advisor program.

As part of the program, 60 new advisors were provided with access to Sales Navigator and best-practices training, which gave them the tools to find the right people, share relevant content at the right time, and better understand their clients and potential clients. Said Diskin, “Our advisors are excited and engaged with the Sales Navigator tool...it’s been a tremendous success.”

### Sales Navigator helps identify opportunities and add clients

Thanks to the next generation advisors program with Sales Navigator, Wells Fargo Advisors identified 712 new client opportunities and onboarded 24 new clients in the first year alone. The new opportunities influenced by Sales Navigator resulted in \$4.22 million in new client assets. Based on the success of the initial launch, the group plans to include Sales Navigator as an official part of their next generation advisor training process.



*In their own words*

The key features of LinkedIn Sales Navigator for Wells Fargo Advisors:

#### STAY CURRENT WITH EXISTING CLIENTS

“If a financial advisor is using Sales Navigator, they’ll see when a life event has happened—a change in jobs, etc—and be able to reach out at the right time with the right message, instead of waiting for that client to reach out to them.”



Chris Diskin  
VP, Digital Marketing

#### START BUILDING RELATIONSHIPS

“With Sales Navigator, you can really get in there, use Lead Builder, and start looking at ways to build meaningful conversations and deepen relationships in a very nuanced way.”



Devin DeStefano  
Program Director, Next Generation Talent - Field

## Building better financial advisors with Sales Navigator

Wells Fargo Advisors uses Sales Navigator to add value across their business – everything from identifying opportunities and relationship-building, to maintaining connections with existing clients, to building partnerships between advisors and mentors.

Check out [lnkd.in/sales-navigator](https://lnkd.in/sales-navigator) to learn more about Sales Navigator.

