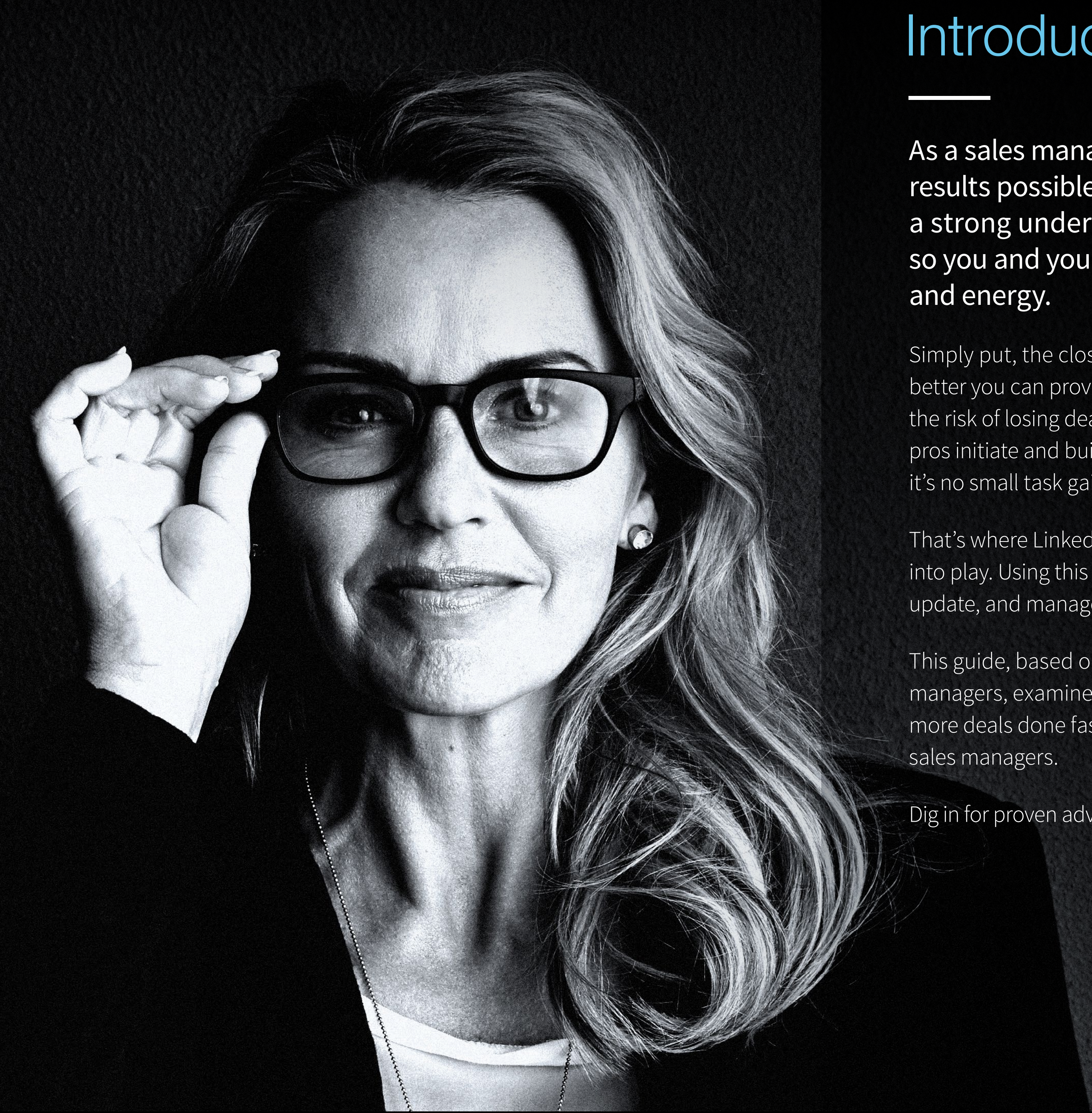
LinkedIn SALES NAVIGATOR

Get Closer to Your Sales Team

How Frontline Sales Teams at LinkedIn Use **Sales Navigator** to Effectively Manage Pipeline



Introduction

As a sales manager, you're charged with driving the best results possible from your sales team. Doing so requires a strong understanding of the state of the pipeline so you and your reps can determine where to focus time and energy.

Simply put, the closer you can get to your reps and their pipeline, the better you can provide the guidance, coaching, and wisdom that reduces the risk of losing deals and boosts the odds of closing them. As your sales pros initiate and build relationships with prospects in target accounts, it's no small task gaining insight into all opportunities across your team.

That's where LinkedIn Sales Navigator and the new Deals feature come into play. Using this solution makes it easier for you and your reps to add, update, and manage data across the entire pipeline.

This guide, based on interviews with some of LinkedIn's top sales managers, examines how Sales Navigator and Deals can help you get more deals done faster based on interviews with some of LinkedIn's top sales managers.

Dig in for proven advice, road tested by the LinkedIn sales leadership team.

Contributors

Isabel Delgado, Manager, LSS

Joan Doyle Foley, Head of Enterprise Sales, LinkedIn

Lisa Killeen, Regional Sales Leader, LSS

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Kate O'Leary, Senior Sales Manager, LMS

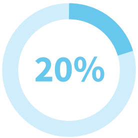
Dan Stanton, Regional Sales Manager, LSS

CHAPTER 1

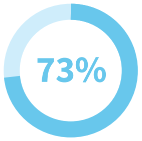
Stats | Proof

Stats/Proof

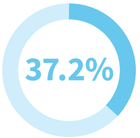
We're going to show you the power of Sales Navigator based on firsthand accounts of LinkedIn sales leaders. However, before we do, let's see what keeps today's sales managers up at night.



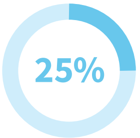
Decision makers typically change roles at a rate of **20%** per year



73% of managers spend less than **5%** of their time coaching, according to Altify



Reps spend **37.2%** of their time on non-core activities, per Sirius Insights



25% of sales reps change roles every year, according to LinkedIn data

Considering the ever-changing sales environment, it's no wonder you and your team struggle to tame the complexity.

24%

It's also no surprise that 24% of forecasted deals go dark. To get ahead and stay ahead, you need to reduce risk and pave the way for wins.

Using Sales Navigator, sales leaders like you are able to do just that by improving how they:

- See into the pipeline
- Evaluate the Buyer Circle
- Ensure accurate forecasting
- Coach reps
- Prep for sales calls
- Follow up after meetings

CHAPTER 2

Deals: Visualize Pipeline With Crystal-Clear Clarity

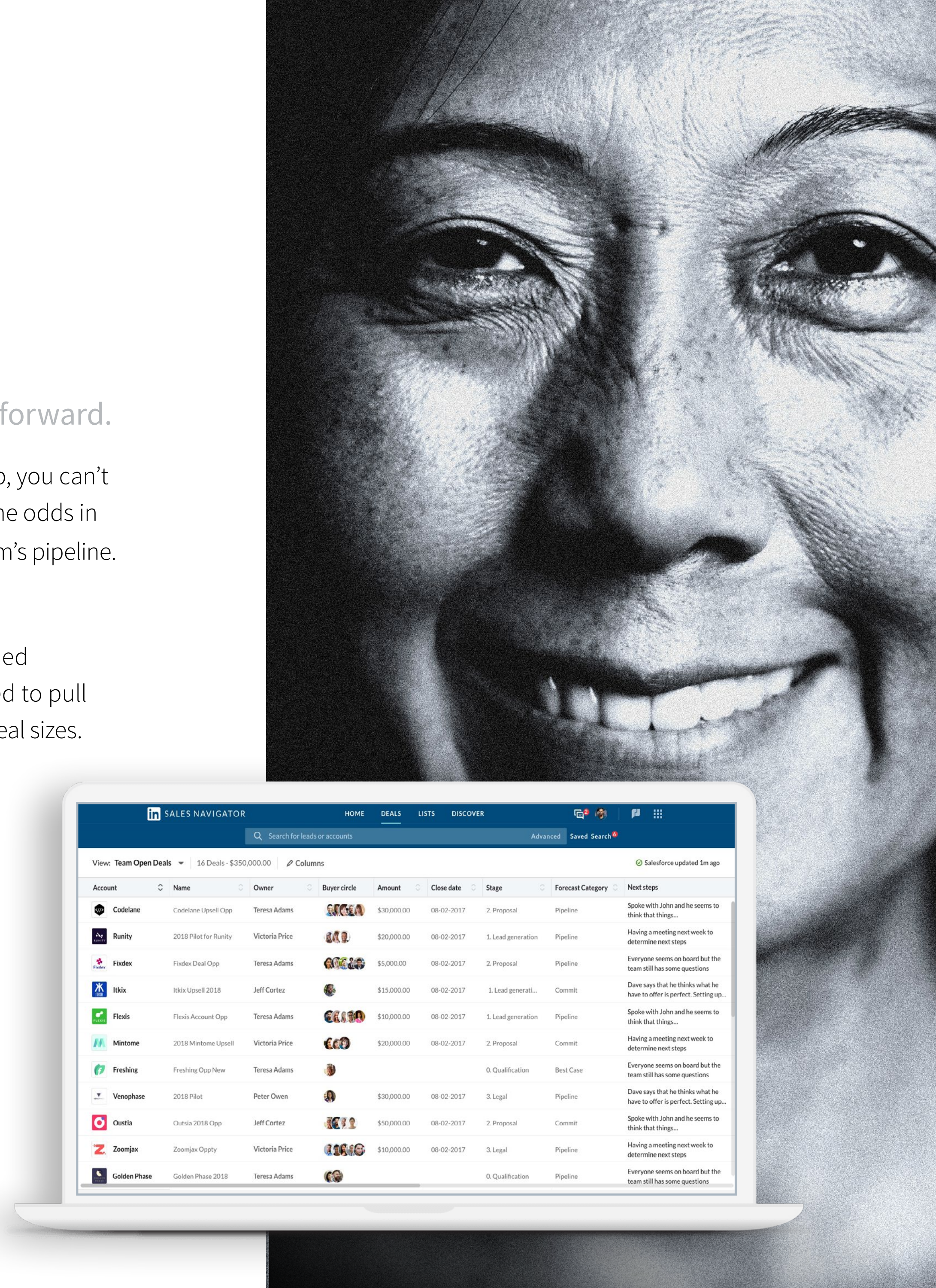
Visualize Pipeline With Crystal-Clear Clarity

Your reps might be doing all the right things to move deals forward.

But unless you can see all their activity and how opportunities are shaping up, you can't confidently say any deal is likely to close or advise on how your reps can tip the odds in their favor. With Sales Navigator Deals, it's easy to get a clear view into your team's pipeline.

Get better insight in less time

Like Isabel Delgado once did, you may have had to suffer to arrive at a needed understanding of pipeline. As Manager for LinkedIn Sales Solutions, she used to pull from Salesforce reports, shared documents, and the latest email to calculate deal sizes. With Deals, she has all that information at her fingertips.



Filter your view

Deals displays pipeline data from your CRM system in Sales Navigator, where you and your reps can edit deal size, stage, close date, next steps and more across the entire pipeline, all on a single page. And with CRM integration, the changes are then automatically written back to the CRM system.

As Jack McKeon, Regional Manager for LinkedIn EMEA, explains, this makes it incredibly easy to filter your view: "I used to explore our pipeline in a spreadsheet, adding endless columns and using color coding to try to make sense of it all. Not only was this inefficient, it's a static view of a dynamic pipeline. With Deals, I can quickly and easily get the focused view that I want—no more wrestling with our CRM system." Through this focused view, Jack can zero in on the critical players in each deal and the relationships his reps need to prioritize.

> **Pro Tip:**
> Create filters to see pipeline for each person on your team individually for a better understanding of pipeline for the quarter.

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– Jack McKeon, Regional Manager, LinkedIn EMEA

CHAPTER 3

Deals: Evaluate the Buyer Circle to Stop Deals from Derailing

Evaluate the Buyer Circle to Stop Deals from Derailing

With upwards of six people on average involved in major purchase decisions, your company's deals are at risk when key players are overlooked, change roles, or leave the company.

Sales Navigator Deals provides an efficient way for your reps to track all buyer stakeholders–including decision makers, champions, and influencers—and see how they may impact the pipeline.

Avoid a single point of failure

Using the Buyer Circle feature, you can better understand the decision makers involved and identify missing players. With that level of insight, you're empowered to hold your reps accountable for building relationships with the right people.

"When I see through the Buyer Circle that we are single threaded, it's a red flag to dig deeper and figure out who else we should be talking to. I use the Buyer Circle to look at other functions that might touch the larger deal," says Joan Doyle Foley, Head of Enterprise Sales at LinkedIn.

Dan Stanton, Regional Sales Manager for LinkedIn Sales Solutions, describes the value of Buyer Circle this way: "Seeing an empty space in a rep's deals is a trigger for me to poke and figure out whether it's a matter of doing standard account cleanup or it signals a true risk."

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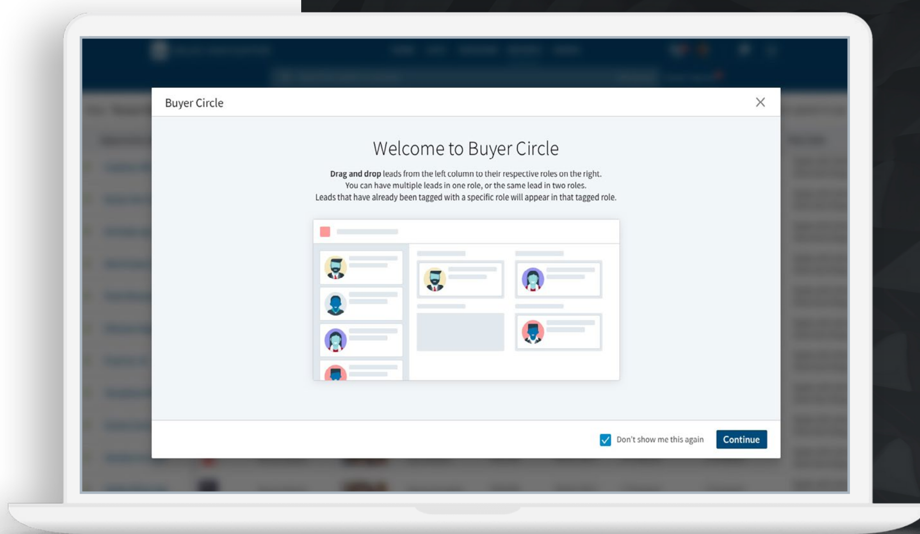

He shares the example of an opportunity with no one listed in the Buyer's Circle. This prompted him to check the CRM system for existing contacts within the target account, which he then added to the Buyer's Circle. It also focused his discussion with the assigned sales rep, with him zeroing in the lack of saved leads. "Immediately, this provides me with an action item for this rep from a coaching perspective: getting her to build out the Buyer's Circle."

Arrive at a big-picture view

Andrew McCarthy, Regional Manager for LinkedIn Sales Solutions, finds the Deals feature invaluable for fully understanding each opportunity. Whether it's a missed company connection, organizational changes within the target account, or big news announcements, Deals quickly provides a complete picture of the organization a rep is trying to close.

Keep pace with real-time changes

Numerous studies have shown that salespeople are far more likely to close a deal the faster they respond to triggers and important events. Sales Navigator can alert you to changes in your saved contacts and leads, so you can seize every opportunity to move a deal forward.

Andrew shares a situation one of his reps faced and how Sales Navigator helped save the day. "I got an alert about a new head of business systems at a target account. I immediately knew why the main contact—who had been replaced—had gone silent. If it wasn't for this information from Sales Navigator, we wouldn't have been able to pivot as quickly as we did to salvage the deal."

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Evolve your approach

Trying to map and track connections using a spreadsheet or document is a losing proposition according to Kate O'Leary, Senior Sales Manager for LinkedIn Marketing Solutions. Rather than get a quickly outdated point-in-time view, she and her reps get a real-time view of the Buyer Circle with Sales Navigator. "It's completely changed my approach to how we manage the buying committee."

Dan Stanton echoes this sentiment. "We can use Deals to evaluate our Buying Circle and then create next steps and automatically assign who does what by when in Salesforce, making our entire process more effective."

> **Pro Tip:**
> Save people in the Buying Circle as leads so you know when key people in your team of accounts change roles, move companies, and do something of note.

> "Sales Navigator Deals completely changed my approach to how we manage the buying committee."

– Kate O'Leary, Senior Sales Manager, LMS

CHAPTER 4

Deals: Ensure Accurate Forecasting in Less Time

Ensure Accurate Forcasting in Less Time

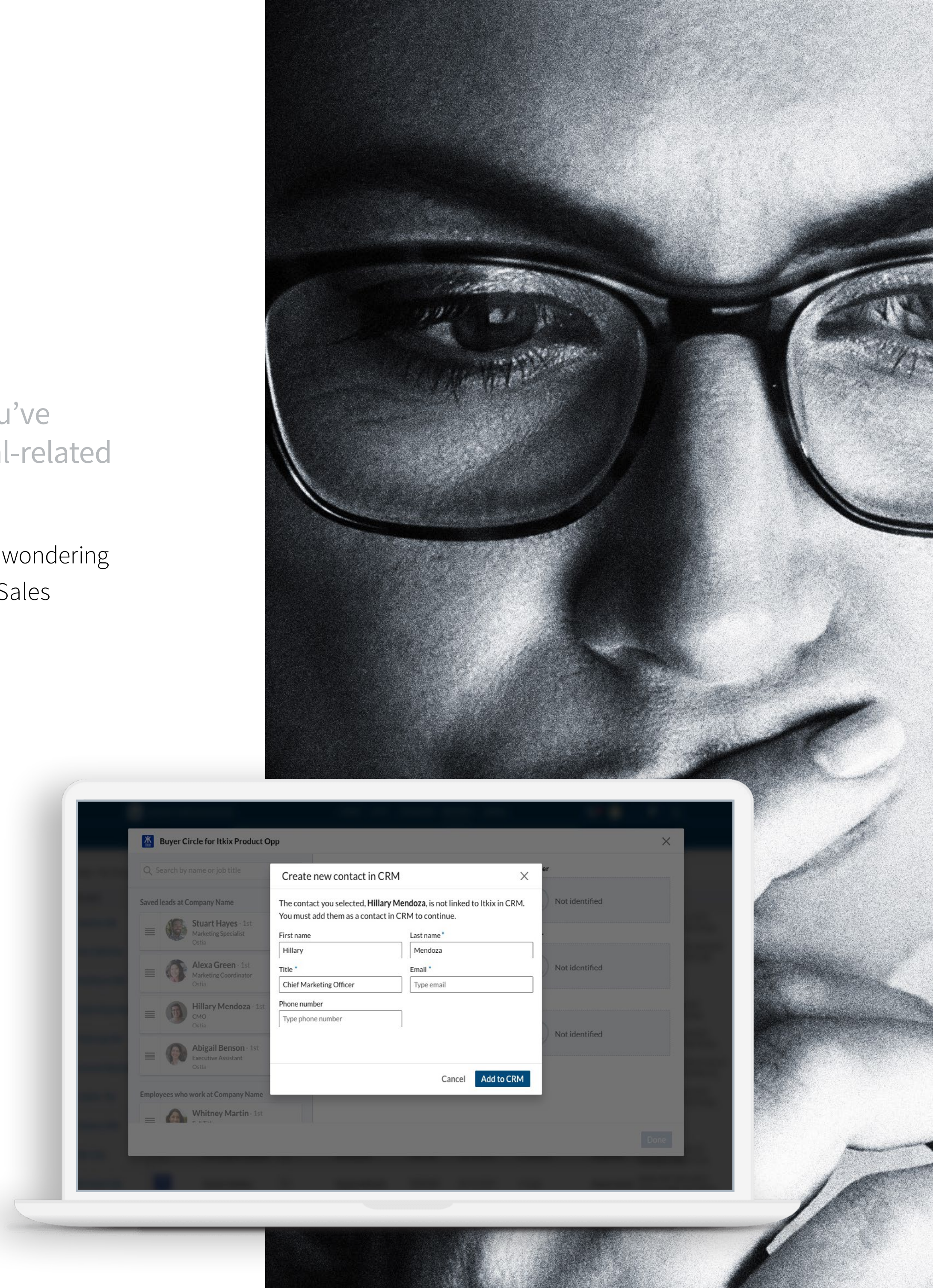
If you're like most sales leaders, at one time or another you've practically pulled your hair out trying to kludge together deal-related information from multiple sources.

Even after all your efforts, how confident are you in your forecast? Rather than wondering what happened to the deals that were marked 'likely to close,' you can use Sales Navigator Deals to arrive at a much more realistic view.

Maintain better control over forecasting

The buck stops with you when it comes to forecasting. With Sales Navigator Deals, you can take more control over what's happening with your team's deals—giving you more power to ensure accurate forecasts.

Here's how Andrew McCarthy uses Deals for forecasting control. "After each meeting, I open the deal, update the next steps, and change the close dates and forecast category if necessary. All the information Deals is automatically fed into our CRM system, saving me hours per week keeping that up to date while also making sure I can forecast more accurately."



Get a more realistic sense of your business

With a clear view into all opportunities across your team, you can better understand where there is risk and how to forecast those deals. Jack McKeon finds this incredibly valuable for his weekly forecast meetings with his reps and his director. “Sales Navigator Deals has made it so much easier to aggregate all the information I use to build my forecast. Plus, it’s better quality information, so I’m delivering a more accurate forecast—and in less time.”

> **Pro Tip:**
> Use Deals to gain both a team overview and individual view of each rep’s book of business.

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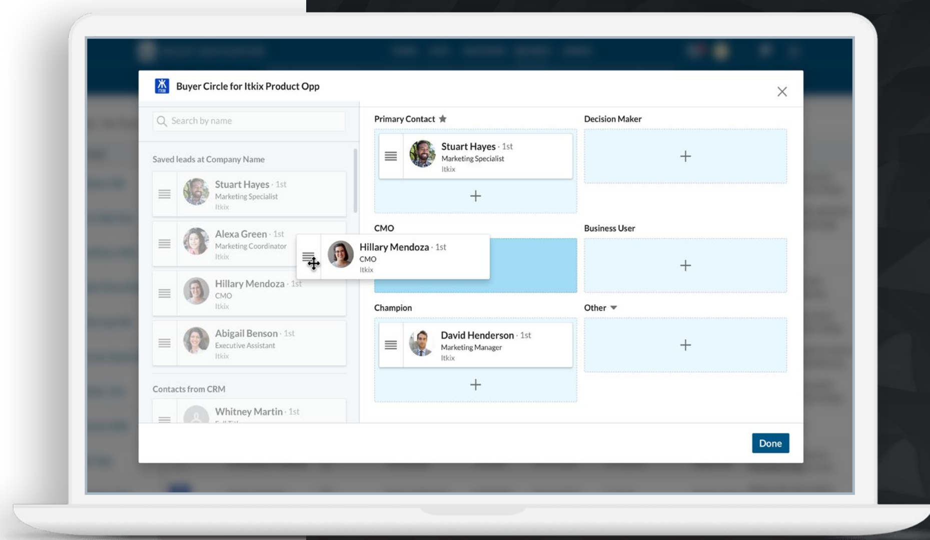


CHAPTER 5

Deals: Elevate Your Coaching and One-to-One Deal Reviews

Elevate Your Coaching and One-to-One Deal Reviews

Discussing the mechanics of a deal—size, expected close date, probability to close and the like—is not the best use of your deal review sessions.

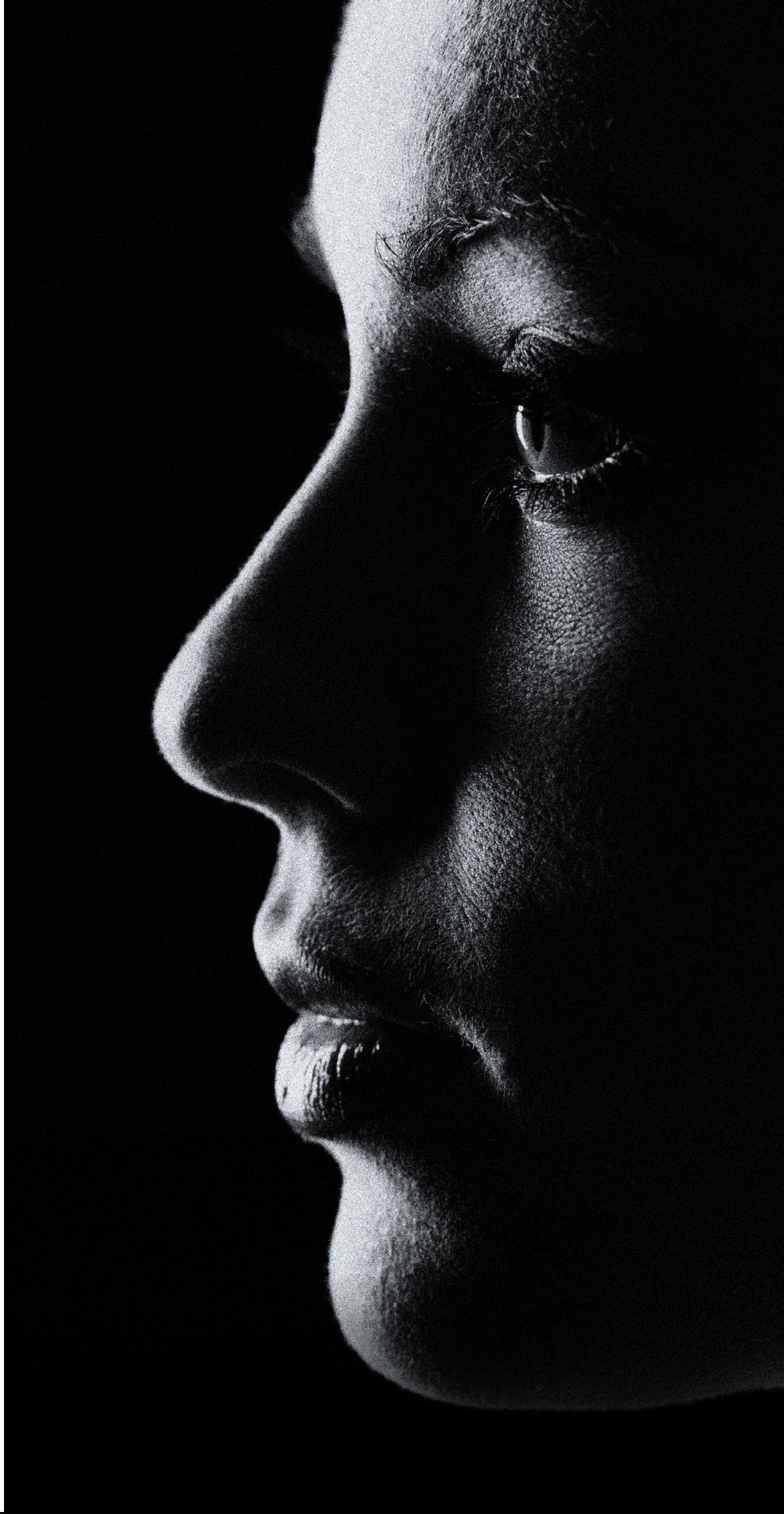
Yet, this ends up being the focus when you lack visibility into everything your reps are doing to move deals along. With LinkedIn Sales Navigator Deals, you get a full, unfettered view into pipeline health, freeing you to support your reps in ways that matter most: strategizing how to win deals.

Spend your time more wisely

Rather than waste time gathering context on past activities, you can use Deals to focus your coaching. Lisa Killeen, Regional Sales Leader for LinkedIn Sales Solutions, relies on the fact that she and her reps can see “next steps” in Deals. She consults these to guide her during her coaching and one-to-one sessions with reps.

She also uses the Buyer Circle feature within Deals to great effect. “The Buyer Circle provides a snapshot that allows me to maximize my time in one-on-one meetings. I can pull Deals up and very quickly see the status and where I can help.” Understanding deal status, you can figure out ways to move the needle.

Joan Doyle Foley finds similar value in the feature. “Deal review is incredibly helpful because we can quickly zero in on holes in our strategy with a target account.”



Engage in more productive conversations

With your reps using Sales Navigator, you're in a better position to make your meetings productive. The Deals feature makes it possible to align on pipeline, including next steps and strategy. Jack McKeon has found that his reps are coming to one-to-one reviews better prepared, knowing he will be looking at this shared view of the pipeline.

Plus, identifying and understanding people in the Buying Circle puts you in a better position to discuss opportunities. "Seeing who is in the Buying Circle prompts me to ask specific questions of my reps," explains Andrew McCarthy.

"The efficiency play is reason enough to start using Sales Navigator Deals. After just a dozen one-on-ones with your reps, you'll realize how much better prepared you are and how much more you can accomplish," says Isabel Delgado.

Boost the multi-threaded count

Sales Navigator Deals can guide you to take action in meaningful ways. Lisa Killeen uses the Buyer Circle insight to find opportunities to make warm introductions between her reps and relevant account contacts.

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Along those lines, the TeamLink feature can help you easily identify promising contacts for your reps. TeamLink automatically shows you connections within your accounts and your colleagues, helping you identify opportunities to connect your team and target accounts.

Dan Stanton uses TeamLink for that very reason. “I might have a strong relationship with an EVP of Sales, but my reps might feel too junior to ask for the introduction. Sometimes my view of TeamLink helps us get into an account simply because of my exposure to other senior-level people in our company.”

Lead Recommendations also pave the way for expanded contacts within an account. Kate O’Leary loves the feature. “It arms me as a manager to sync with my team and keep tabs on how they connected with a suggested lead and who is the next person we should be reaching out to when we know our main point of contact is leaving.”

Pro Tip:

Make sure all your sales reps are using TeamLink to quickly and easily expand their reach and connections within target accounts.

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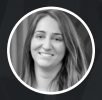


– Kate O’Leary, Senior Sales Manager, LMS

CHAPTER 6

Make Every Moment Matter in Meeting Prep

Make Every Moment Matter in Meeting Prep

You know preparation is the key to client meetings and sales calls going well. But your time is valuable, so you want to spend it wisely—especially when the stakes are high.

Sales Navigator is your reliable conduit to accurate information about target accounts and the pipeline. By getting a quick view into Sales Navigator's Deals feature, you're better positioned to strategize on how to drive the best outcome from your team's meetings and calls.

Understand the players

It's essential to know who you will be talking to and what matters to them. Sales Navigator serves up the insights you need to confidently engage key stakeholders. As Lisa Killeen says, whether someone is being promoted or is new to a business, you'll find out nuggets of valuable information like this from Sales Navigator that you couldn't easily get anywhere else. "Talking to a CEO who is new to the business is different than talking to a long-standing CEO. Knowing who I will be talking to helps me go into that meeting with the right strategy."

Dan Stanton feels Sales Navigator is one of the best prep tools for sales managers. "I get the most amount of information possible in very little time so I'm informed to take a sales call. I can even use the Sales Navigator app to manage all this in the field."

See all potential connections

Helping your reps connect with the right people within an account is an effective way to build out the Buyer's Circle. As Andrew McCarthy says, Deals can help you connect the dots. "Going into a meeting, I use Deals to find out if anyone in that meeting is connected to someone at LinkedIn, recently got promoted or has been in the same role for many years. All those indicators help me better run the play and do a better job for the prospective customer."

Empower sales reps

According to Andrew, Sales Navigator puts power back in the hands of sales reps. With it, they can answer questions like: Who are the decision makers? What do they care about? Who in your organization should I know? Who's involved in the decision-making process? "Previously customers held all critical information in their minds. Our solution helps swing the pendulum back toward sales so they can answer key questions without relying solely on the customer."

Simply put, Sales Navigator shows you who is involved in a deal and who may have missed. In turn, you can deliver relevant messages to the right people.

Pro Tip:

Set Sales Navigator to send you weekly updates on the accounts your reps are working so you'll always have timely insights at hand.

CHAPTER 7

Make the Most of Meeting Follow-Up

Make the Most of Meeting Follow-Up

A thoughtful, well-timed follow-up can move your reps closer to winning a deal. Sales Navigator equips you to make the most of these opportunities.

Stay in the know

By following the main decision makers in a deal and their Company Page, you can keep your finger on the pulse of what's happening within the target account. Combined with the real-time updates LinkedIn Sales Navigator delivers, you'll know how to steer conversations in meeting follow-ups.

Lisa Killeen shares the example of seeing a LinkedIn post by the chief revenue officer (CRO) she and her rep had just met with. The post talked about the CRO wanting to connect his marketing and sales teams. These insights enabled Lisa and her rep to reach out with relevant details from the Sales Navigator product roadmap that intrigued the CRO.

In another instance, a prospect said they were planning to hire 50 people for a new department during a meeting with Lisa. When she saw the news published on LinkedIn, she used that as a reason to reach out and drive a conversation around moving the deal forward.

Gain invaluable insights through interactions

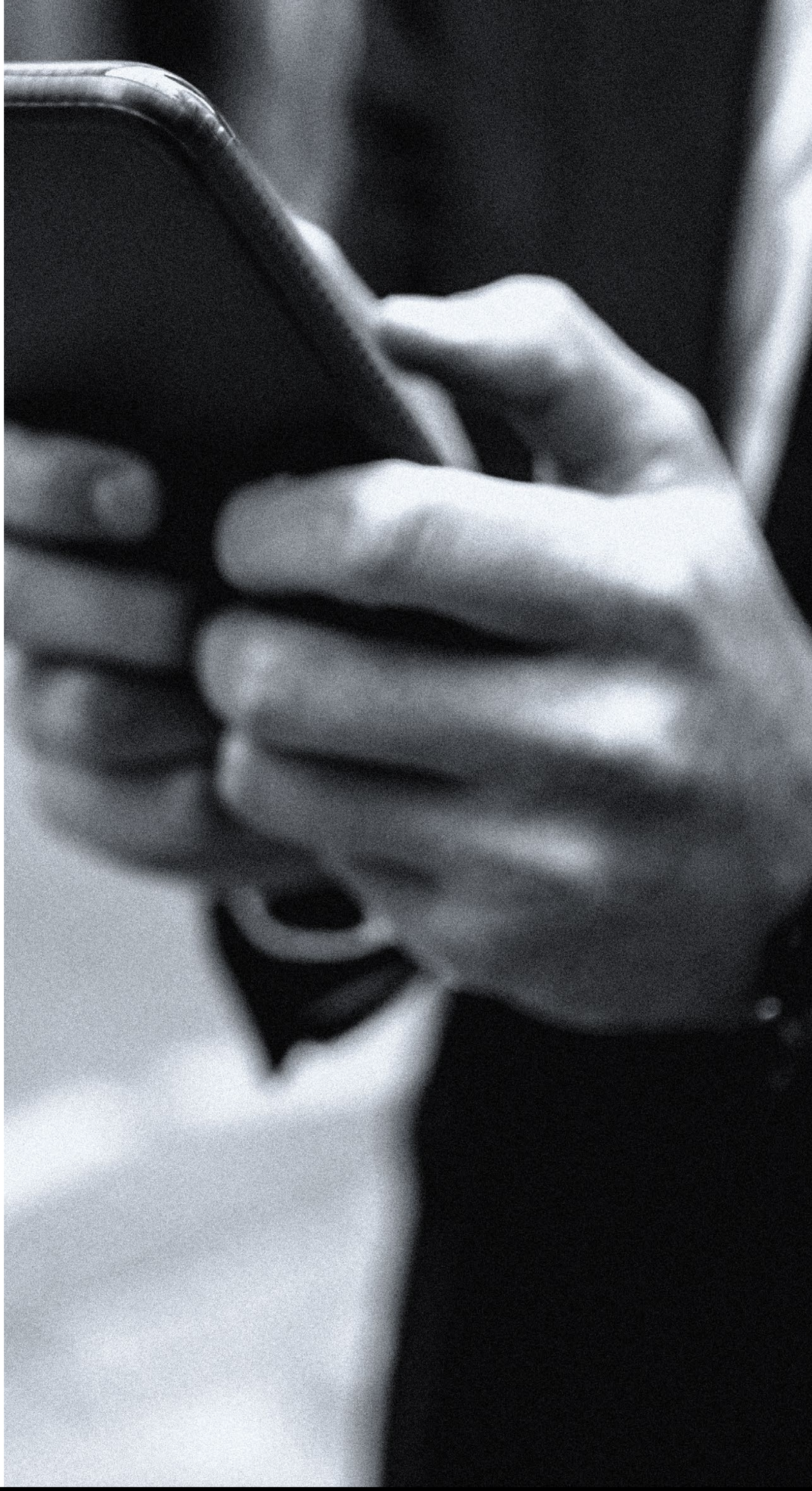
Using PointDrive, you and your reps can easily co-create an online presentation featuring relevant documents, PDFs, articles, and more. You then share it via a URL that prospects can access via any device and any electronic communication channel: real-time chat, InMail and more. The recipients can easily share the content with their colleagues, and you can easily track who opens it and how long they spend looking at the content.

According to Lisa, this is invaluable when you're not well multi-threaded in an account. "Certain companies in certain markets tend to be quite private and don't reveal a lot of information. PointDrive is fantastic in helping us understand who else will be involved in the decision-making process because they open the presentation."

Drive deal momentum

PointDrive is also helpful for up-leveling the conversation in a target account. Sending customized content to the CEO or another high-level stakeholder can further the relationship and accelerate deal momentum.

Andrew McCarthy praises PointDrive for helping save a deal. After his main contact told him that finance wasn't involved in the decision-making process, Andrew saw the contact forward his PointDrive to the CFO, who then forwarded it to the financial controller. This insight made it possible for Andrew to reach out and help the finance team understand the value of the deal from their perspective. The deal closed in two days.



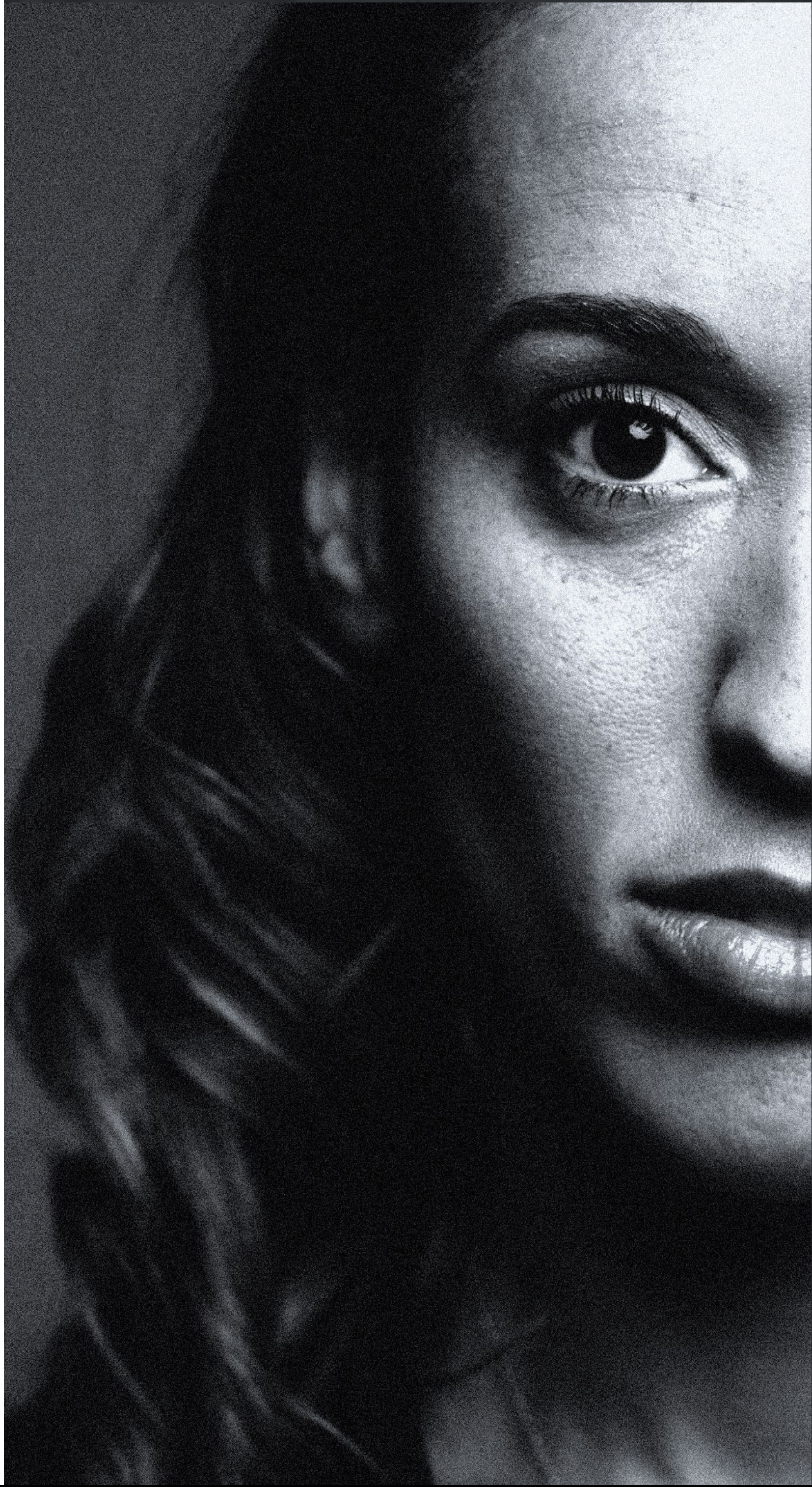
Stand out with InMail

To avoid getting lost in your prospect's inbox, use an InMail message for follow-up. Here's how Joan Doyle Foley makes the most of InMail. "After I attend a prospect meeting with one of my reps, I always follow up using InMail to connect with the people I've met. I also use it to keep in touch throughout the course of the sales cycle. Even if I have their email address, I follow up via InMail because it stands out."

Reach out with relevance

Even on the best days, your follow-up might not resonate. By paying attention to Who's Viewed Your Profile on LinkedIn, you will understand when it makes sense to stay persistent. For instance, Kate O'Leary and her team note when a prospect views one of their profiles even though they didn't respond to their outreach. "It's a good indicator we need to incorporate better insights or data into our message to make it more impactful. It can also point us to a new person in the Buyer Circle when our main contact passes along our information."

> **Pro Tip:**
> Watch Who's Viewed Your Profile (and your reps' profiles) for a reason to reach out.



Conclusion

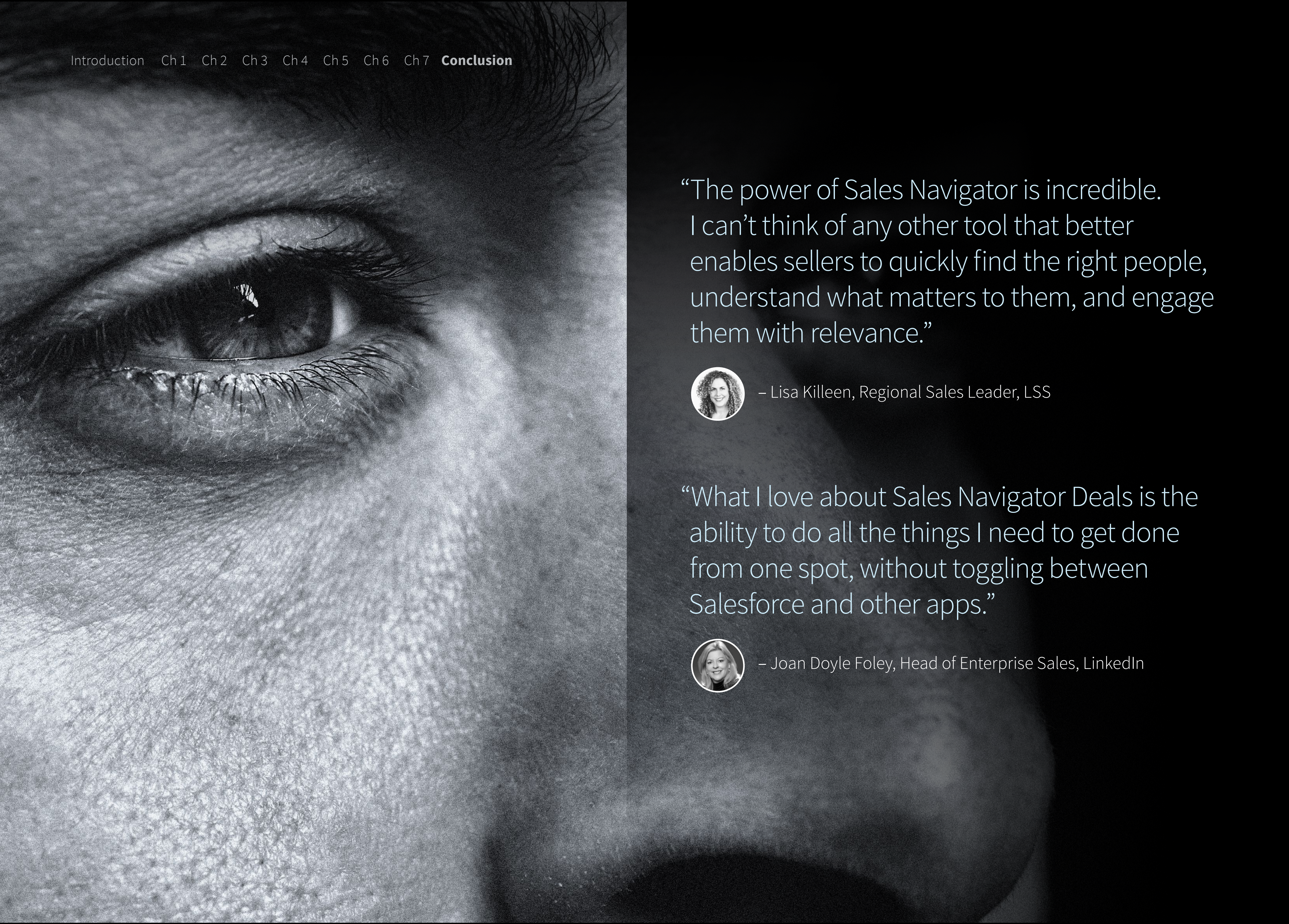
When it comes to ensuring pipeline health and reducing sales risk, don't leave things to chance.

You and your reps need to collaborate effectively to make the best decisions about how to build the right relationships and drive deals forward. It starts with getting closer to deals with accurate, timely visibility into the pipeline. But that's a major challenge for most sales leaders.

Sales Navigator is how you get closer. Sales managers on Sales Navigator are getting more visibility into the buying committee, hosting more productive deal review sessions, and gaining better insight into pipeline health. Using Sales Navigator can help your sales organization become more efficient and more effective at managing pipeline health and reducing sales risk.

"It's hard to put a value on ease and efficiency I get with Sales Navigator Deals."

– Jack McKeon, Regional Manager, LinkedIn EMEA



"The power of Sales Navigator is incredible. I can't think of any other tool that better enables sellers to quickly find the right people, understand what matters to them, and engage them with relevance."

– Lisa Killeen, Regional Sales Leader, LSS

"What I love about Sales Navigator Deals is the ability to do all the things I need to get done from one spot, without toggling between Salesforce and other apps."

– Joan Doyle Foley, Head of Enterprise Sales, LinkedIn

LinkedIn SALES NAVIGATOR

LinkedIn Sales Navigator makes it simple to establish and grow relationships with prospects and customers by helping you tap into the power of LinkedIn, the world's largest professional network of more than 550 million members. Designed for sales professionals, LinkedIn Sales Navigator combines LinkedIn's network data, relevant news sources, and your accounts, leads, and preferences to produce customized recommendations and insights. With LinkedIn Sales Navigator, you can focus on the right people and companies, stay up-to-date on what's happening with your accounts, and build trust with your prospects and customers.

Looking to get LinkedIn Sales Navigator for your team? **Learn more.**