LinkedIn

CRM Sync for Sales Navigator and Salesforce Technical Implementation and Security

salesforce | in® | SALES NAVIGATOR

This document describes the technical implementation and security for importing Salesforce Accounts, Contacts and Leads into Sales Navigator, and writing back select Sales Navigator activity to the CRM.

Technical Requirements

- A Salesforce Administrator account on one of the following editions:
  - Salesforce: Enterprise, Unlimited and Developer editions
  - Salesforce: Professional *with API access enabled*
- The Sales Navigator for Salesforce app, installed by a Salesforce Administrator (required only for writing back activity to the CRM)
  - See our *LinkedIn Sales Navigator for Salesforce Installation Guide* to learn more
- A Sales Navigator account to authenticate to Sales Navigator as an admin
- JavaScript enabled browser
- Sales Navigator Team or Enterprise edition

Benefits of CRM Sync in LinkedIn Sales Navigator

- The CRM Sync saves users' time by automatically importing the Accounts and Contacts associated with open Opportunities that are assigned to them in the CRM. Accounts and Contacts are automatically saved as Accounts and Leads in Sales Navigator. This enables Sales Navigator to automatically deliver updates to users on the most important people and companies.

  Accounts and Leads are saved for all open Opportunities whose stage is greater than the stage chosen in CRM sync preferences. This stage is set by the Admin for all users.

- The CRM Sync also saves time by automatically importing all the Leads assigned to users in Salesforce. Leads are not automatically saved in Sales Navigator; instead, they are shown as Suggested Leads, which users can later choose to individually save. Sales Navigator suggests Leads by combining existing CRM data with LinkedIn's own data and relevance information.

  Users are shown Suggested Leads for all leads assigned to them in the CRM.

Data Mapping: CRM → Sales Navigator
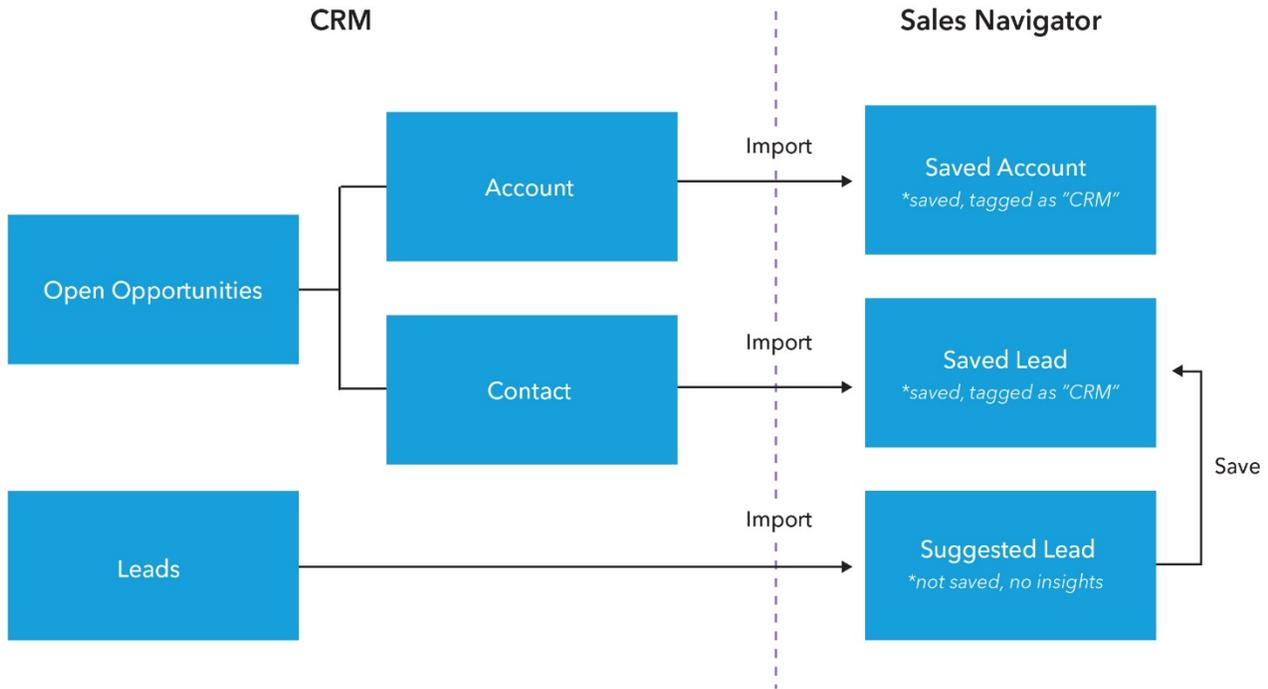
- Users see "View in Salesforce" buttons within Sales Navigator (for CRM imported records). Clicking this button saves users' time by loading up the matching CRM record in Salesforce.

- "View in Salesforce" buttons will show up for 1) accounts and leads saved from the CRM as well as 2) accounts and leads that are found and matched in the CRM.

- Users are able to write-back select activities (Notes, InMails, Messages) from Sales Navigator, associated with their matched Account/Contact/Lead records in the CRM.
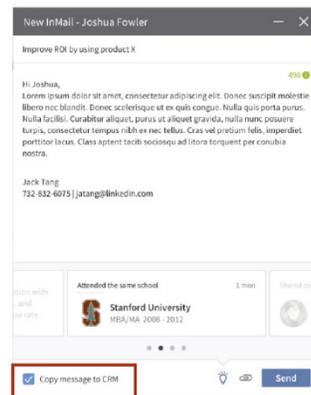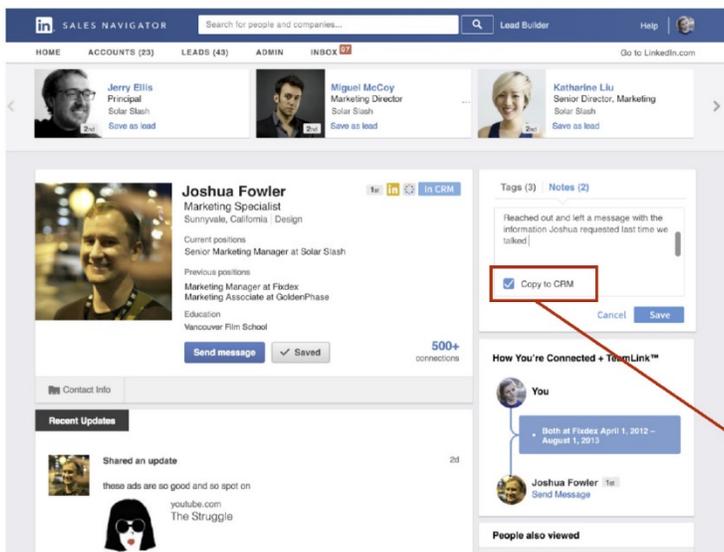
"Copy to CRM" checkbox allows end-users to choose which activities to copy to the CRM.

Objects and Fields Imported from CRM

Object	Fields	Usage
Lead	Id, City, Company, ConvertedAccountId, ConvertedContactId, ConvertedDate, ConvertedOpportunityId, Country, CreatedDate, Email, FirstName, Industry, IsConverted, IsUnreadByOwner, LastActivityDate, LastName, LastReferencedDate, LastViewedDate, LeadSource, OwnerId, Phone, State, Status, Street, Title, Website, LastModifiedDate	Match CRM Leads to Leads in Sales Navigator
Contact	Id, AccountId, CreatedDate, Department, Description, Email, Fax, FirstName, LastActivityDate, LastName, LastModifiedDate, LastReferencedDate, LastViewedDate, LeadSource, MailingStreet, MailingCity, MailingCountry, MailingState, Name, Phone, Title	Match CRM Contacts to Leads in Sales Navigator
Account	Id, Name, Website, AnnualRevenue, NumberOfEmployees, Phone, Industry, Type, BillingStreet, BillingCity, BillingState, BillingCountry, BillingPostalCode, CreatedDate, LastModifiedDate, OwnerId, Description, Fax, ParentId, ShippingCity, ShippingCountry, ShippingPostalCode, ShippingState, ShippingStreet, LastReferencedDate, LastViewedDate, Rating, TickerSymbol, Ownership, Sic	Match CRM Accounts to Accounts in Sales Navigator
Opportunity	Id, AccountId, Amount, CloseDate, CreatedDate, IsClosed, IsWon, LastActivityDate, LastReferencedDate, LastViewedDate, LeadSource, Name, OwnerId, StageName, Type, LastModifiedDate	Filter Accounts and Contacts to import into Sales Navigator by selecting only those that are related to open Opportunities whose stage is past the stage selected in CRM sync preferences
OpportunityContactRole	Id, ContactId, IsPrimary, OpportunityId, Role, CreatedDate, LastModifiedDate	Join Opportunities with Contacts
User	Id, Name, Department, Email, FirstName, LastName, Title, Phone, MobilePhone, IsActive, UserRoleId, CreatedDate, LastModifiedDate	Map CRM Users to Sales Navigator Users
UserRole	Id, Name, ParentRoleId, LastModifiedDate	Filter CRM users to specific groups when selecting users to assign seats

Objects and Fields Written to the CRM

Object	Fields	Usage
InMail (custom task activity)	LSN_To_c, LSN_From_c, LSN_Subject_c, WhatId, WhoId, Owner, CreatedBy, LSN_Date_Sent_c, Status, Description	InMail messages written to non-connections
Message (custom task activity)	LSN_To_c, LSN_From_c, LSN_Subject_c, WhatId, WhoId, Owner, CreatedBy, LSN_Date_Sent_c, Status, Description	LinkedIn messages written to 1st degree connections
Notes (standard object)	Owner, ParentId, Title, Body	Notes captured against Accounts or Leads in Sales Navigator

Data Flow Diagram
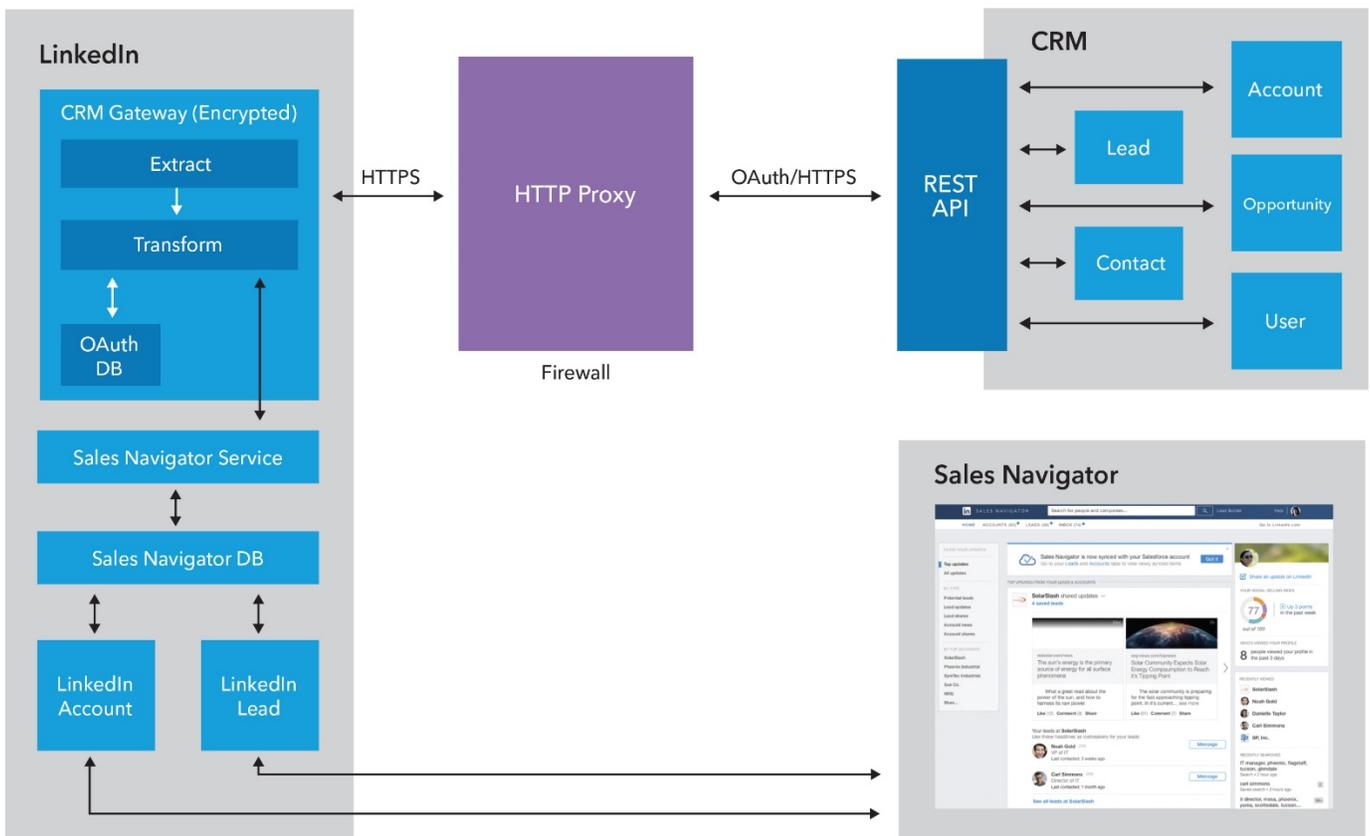
Frequency of Sync

Sales Navigator imports all of the above data once during the initial configuration as well as on a daily basis. The import is cumulative, so when records are removed from the CRM or change ownership, nothing will ever be automatically removed from Sales Navigator. Sales Navigator admins can verify the last CRM sync by checking the timestamp in "Admin Settings" in Sales Navigator.

Sales Navigator makes most of its API calls to Salesforce using the Bulk API. This allows us to batch and reduce the number of total API calls - decreasing the likelihood that you will hit your API limits.

Activity is written back to the CRM on a more frequent basis, about every 2-5 minutes.

Frequently Asked Questions

How is the imported CRM data used by LinkedIn?

The imported CRM data is used as a convenience to the end user to quickly sync their relevant Accounts, Contacts and Leads. In addition, the imported CRM data is used to improve the relevance of Sales Navigator features on behalf of the end user (ex: lead recommendations, insightsm and Social Selling Index).

With your approval, LinkedIn may also use your imported CRM data to analyze and provide you with custom "ROI" reporting. These reports can help you understand the influence LinkedIn/Sales Navigator has on deals in your pipeline, the value of those deals, and how efficiently your sales professionals are able to close them.

What security protocols/measures does LinkedIn use to protect customer data and where is the data being stored?

LinkedIn employs strict access control policies and holds itself to high standards of integrity in handling intellectual property. Our collection and use of member data and customer related data is governed by LinkedIn's privacy policy: https://www.linkedin.com/legal/privacy-policy .

In addition, the imported data is also secured on production databases with limited and audited access, encrypted at rest, ensuring your private data is never used for anything other than the above-mentioned purposes.

What data and customizations are pushed back into my CRM?

The data written back to the CRM is outlined in the table above. Note that since all data is written and associated with parent accounts/contacts/leads, no existing data is over-written or merged, only appended as associated activities.

Limited customizations are made to the CRM through the Sales Navigator for Salesforce app, which contains metadata specific to LinkedIn activities (InMails, Messages). Additionally, there is metadata for PointDrive events (such as presentations created and viewed), and an "Is Influenced" flag on Opportunities, which will be written back to the CRM in a future release.

Do I need to enable writing data back to my CRM in order to use the CRM Sync feature?

No. You can enable CRM sync to import accounts, contacts and leads into Sales Navigator, without turning on activity write-back.

When you are ready to turn on activity write-back, as an admin you're able to 1) test the feature by writing a "test" contact with associated activities to the CRM and 2) choose to enable the specific activities you'd like to be written to the CRM.

Enable Sales Navigator data to sync back to your CRM?

Synced Sales Navigator data will not overwrite existing CRM data fields. Sales Navigator data items will be added as tasks to your CRM's native task UI, by date of creation.

View how synced Sales Navigator data will appear in your CRM   `Test 2-way sync`

☐ Sync back all data items (or specify specific items below)

   ☐ InMails and Messages

   ☐ Notes

   ☐ PointDrive

How does LinkedIn authenticate to my Salesforce instance? How is that communication secured?

For all data integrations, we use OAuth to make the integration process seamless and to ensure a member is always in control of their data. For these integrations, LinkedIn does not have access to the member's credentials, and the member can revoke the access token at any time either through Sales Navigator settings or through the service provider's application authorization flow. All of our communication between LinkedIn and Salesforce is over TLS.

Did LinkedIn perform any penetration testing?

Yes, we have completed internal penetration testing of the CRM Sync feature and as of date, we are not aware of any issues that would compromise the confidentiality and integrity of the CRM data stored on LinkedIn's platform.

Has the CRM Sync been certified on the Salesforce AppExchange?

LinkedIn is a certified Salesforce partner and goes through an annual security review process of our integration. The CRM Sync is not distributed through the Salesforce AppExchange, but directly uses Salesforce's API to access and write client's' Salesforce data.

Certifications and Compliance Standards

- LinkedIn has the following industry standard certifications: PII and PCI
- LinkedIn meets the following compliance standards:
  - TRUSTe's Privacy Seal
  - U.S.-E.U. and U.S.-Swiss Safe Harbor Frameworks

To view our Privacy Policy, visit https://www.linkedin.com/legal/privacy-policy

For more information about our security practices, visit https://security.linkedin.com

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