LinkedIn SALES NAVIGATOR

Get Closer to Your Customers

How the LinkedIn Sales Team Leverages **Sales Navigator** to Understand, Engage, and Renew Customers

Introduction

Staying in touch with the contacts at your accounts is essential to keeping relationships strong, encouraging renewals, and identifying opportunities for cross-sells and up-sells.

Remember: A lot can happen in a short time. Decision makers seemingly disappear and appear out of nowhere, and the power dynamics of decision-making teams change. While your customers may be content with the service they're getting from your company, they might be itching to explore what the competitive landscape can offer.

Whether you are an account executive, account manager or customer success managers, the closer you can get to your customers, the better you can understand their business, challenges, and goals—and guide them down the path to renewals and additional purchases. But how you go about building relationships—and with the right people—makes all the difference when it comes to strategically managing accounts.

LinkedIn Sales Navigator makes it easy with tools that focus on helping the entire sales organization—including you—find the insights and share the information to build trusted relationships.

This guide examines how Sales Navigator can help based on more than a dozen interviews with LinkedIn sales staff. While it's primarily intended for Account Managers (AMs) and Customer Success Managers (CSMs), SDRs, AEs, and Sales Managers will find plenty of value by reading on.

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

Contributors

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Maggie Williams, Renewal Specialist, LSS

CHAPTER 1

Stats | Proof

Stats/Proof

Before we explore the power of Sales Navigator,
let's see what today's AMs and CSMs are up against.

28%

According to CEB, only 28% of sales leaders agree that existing account management channels meet their cross-selling and account growth targets.[1]

Simply put, conventional account management strategies are limiting growth. This comes as no surprise considering the challenges facing AMs and CSMs.

Existing customer relationships are at risk due to turnover within both the customer organization and the sales team. Decision makers are moving within and between companies faster than ever before.

20%

Within a given year, 20% of senior-level decision makers are changing roles. If you count on an existing relationship to renew or grow an account, you're at risk.[1]

Moreover, account managers and CSMs are finding it hard to spot new opportunities in a world where consensus purchases rule the day.

47%

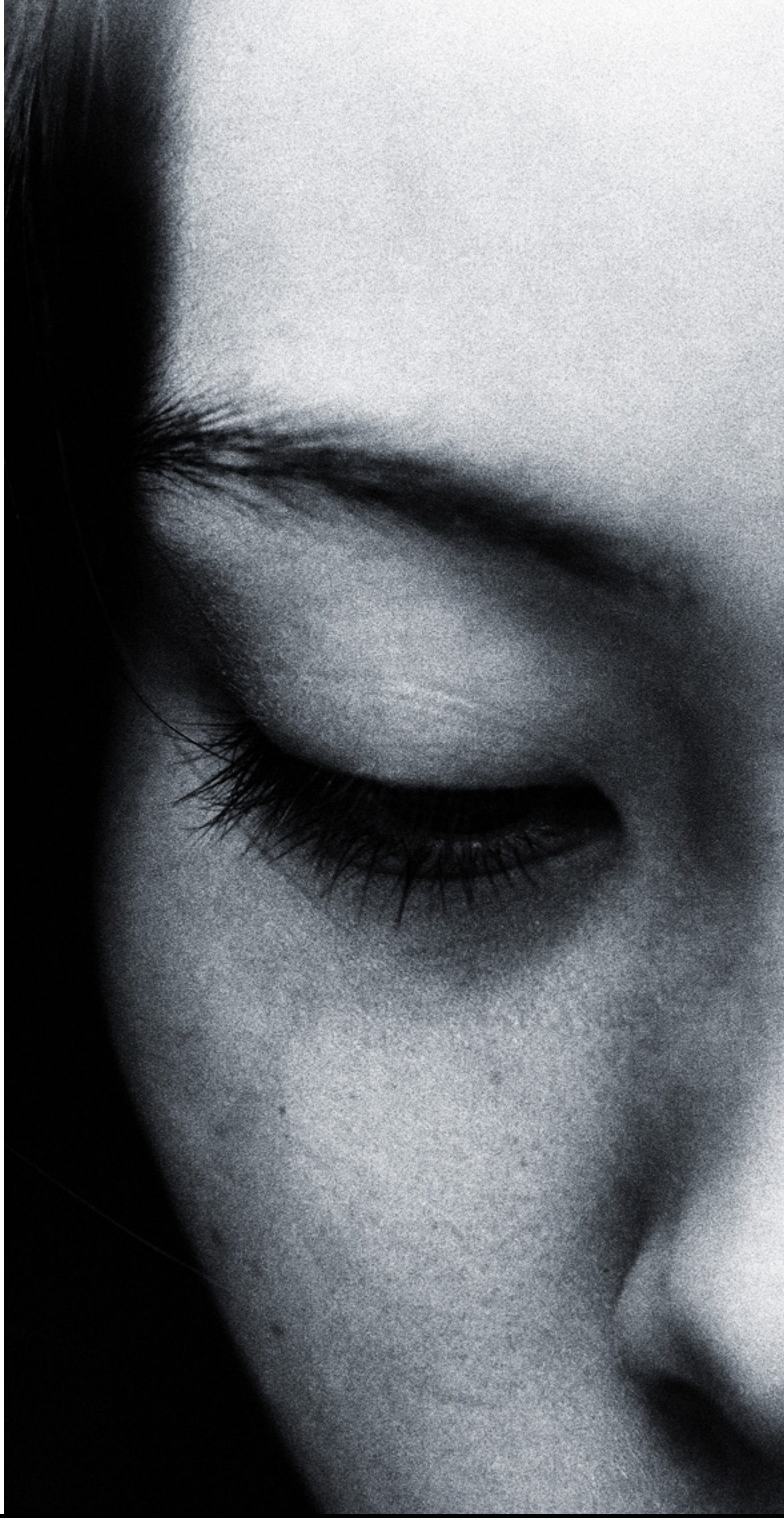
Average bookings are 47% lower when AMs and CSMs maintain relationships with fewer than six people within an account.[1]

Let's not overlook the customer experience imperative. According to Walker—a customer experience consulting firm—by 2020, customer experience will overtake product and price as the key differentiator in a purchase decision, even for renewals. As a result, AMs and CSMs must continually find ways to expand accounts while also ensuring an outstanding customer experience. This at a time when AMs and CSMs are expected to offer relevant insights and value, but are struggling to do so.

Using Sales Navigator, AMs and CSMs are overcoming these challenges by:

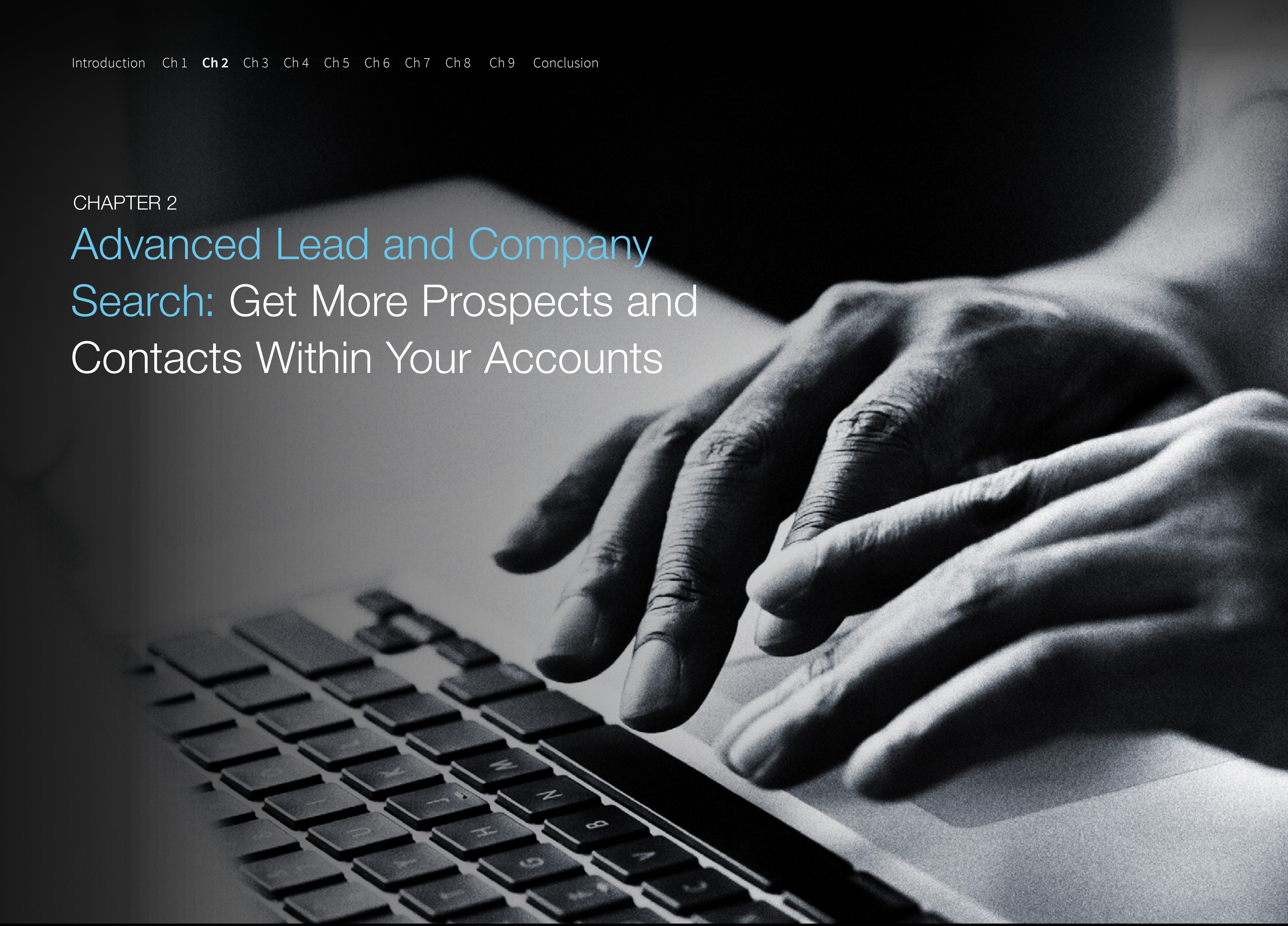
- Targeting and tracking key contacts to protect and grow revenue
- Understanding and mapping accounts to spot new growth opportunities
- Engaging credibly with contacts in accounts from the start and over time

> By 2020, customer experience will overtake product and price as the key differentiator in a purchase decision, even for renewals.



CHAPTER 2

Advanced Lead and Company Search: Get More Prospects and Contacts Within Your Accounts



Advanced Lead and Company Search

Zero in on your account and gain valuable insights with a search experience that delivers the most relevant results.

With Sales Navigator advanced search and segmentation, you can easily drill down into relevant stakeholders within your accounts. You can search by seniority, function, relationships to your connections and more.

That's essential because, according to the latest CEB research, an average of **6.8 people** are now involved in B2B buying decisions. But this committee shifts shape whenever people take new positions, or when teams are reshuffled within your account's organization.

LinkedIn Advanced Search can help you stay on top of accounts and identify engagement opportunities. By keeping you attuned to changes within the buying committee, you're better positioned to stabilize the business relationship.

Expand your view of each account

LinkedIn AMs and CSMs find a big advantage in the advanced search feature, giving them a view into how companies are structured so they can map the buying committee.

> "It's a good proxy to know how many marketers and salespeople are at every company in my client base, so I get a sense of how large and complex the organization is. Sometimes I'll filter deeper to see, for instance, field marketers or VPs and directors of marketing, to plan for potential ways to grow the account."

– Piper Lewis, Senior CSM, LMS

Mapping also helps you determine which individuals are most important to communicate with regularly. Plus, by connecting with more than one person in the account, you get a more well-rounded, realistic view of the buying process and potential barriers to purchase. You're also better able to tailor your approach to the overall account and each individual within it.

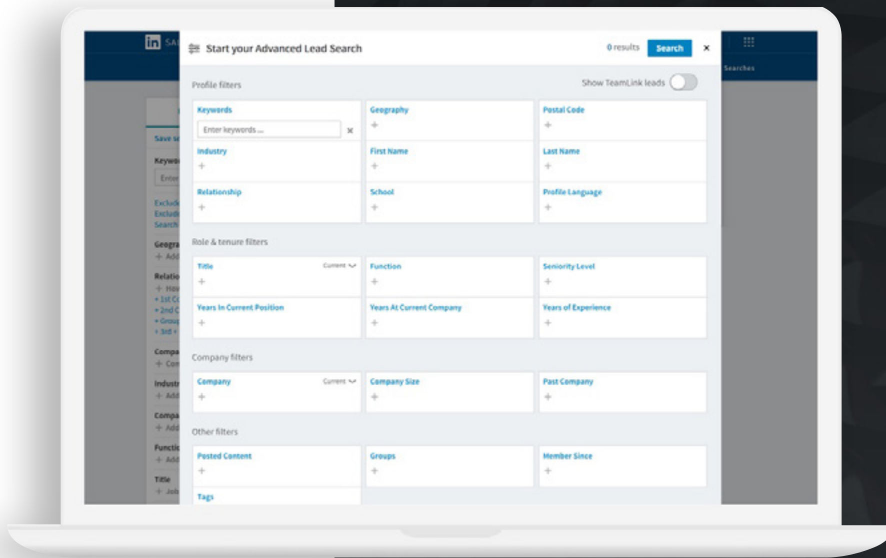
Get multi-threaded

With so many people influencing the average purchase decision, it's smart to take a multi-threaded approach in all your accounts. In other words, establish relationships with six or more stakeholders.

This multi-threaded approach can pay off big. Consider the experience of Lauren Staniec, Regional Account Manager for LinkedIn. After one of Lauren's accounts was acquired by a much larger company, her main contacts went silent. She used Sales Navigator to study the new parent company and figure out where her original account was going to sit in the structure. As a result, she was in a solid position to confidently approach the account with a proposal to grow the business. And she did just that, to the tune of a renewal approaching six figures.

> "I'm multi-threaded in every account I support, and that wouldn't necessarily be possible without having identified those individuals through Sales Navigator."

– Lauren Kelley, Senior AM, LSS



Stay attuned to shifts

By tracking these committees, you can also identify the roles and scenarios in which turnover occurs most, helping you be prepared for such events.

Pay attention to trigger events

Account and customer success managers should remain vigilant for social activity that could indicate people within an account are ready to make a change. Promotions, leadership changes, company news, mergers, and other activity could all serve as potential triggers for new purchases. Sales Navigator alerts you when accounts are sending out these types of buying signals. In essence, it enables you to monitor your saved relationships to understand what they're doing on LinkedIn. In turn, you can proactively reach out to your contacts to stay top of mind.

Consider the impact this has had on John Hopkins, Renewal Specialist at LinkedIn. After reviewing one client's usage reports, he searched on those in director-level sales roles within the account. Within just one week of finding those people, John was closing a $100,000 renewal. As he says, "I wouldn't have been able to identify and connect with those key stakeholders so quickly without Sales Navigator."

Pro Tip:

Using Lead Builder within Advanced Search, filter on the companies and functions that matter to you and save that search. Every time a new individual joins one of the accounts you're working, you'll be proactively notified.

> "Since starting with LinkedIn a year or so ago, I've seen many changes with the individuals who are responsible for their company's relationship with LinkedIn. Sales Navigator makes it easy to stay up to date on that and maneuver through other departments within an organization."

– John Hopkins, Renewal Specialist, LSS

CHAPTER 3

PointDrive Presentations: An Easier Way to Share Content

PointDrive Presentations

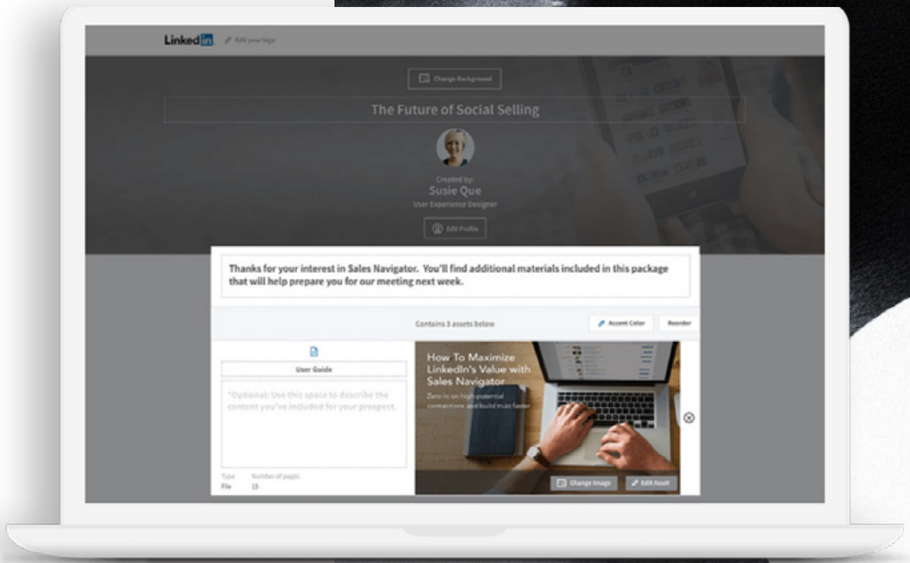
Package and share sales content in a way that's better for both you and your contacts. They see content without downloading, and you can track who has viewed what.

Every day, your account contacts are bombarded with an overwhelming amount of information in emails. By continuing to send proposals, presentations, case studies, contracts, and more via email, you're just adding to the problem. Plus, your story is lost the minute your contact forwards that email to everyone else who influences account purchases.

Adding to the frustration is the fact that you have no idea if your contact saw your email or viewed the content you sent. No wonder so many account managers pester their contacts with follow-up messages to find out where things stand.

Streamline client interactions

With PointDrive, you can easily assemble an online presentation featuring relevant documents, PDFs, articles, and more. Once you've packaged up the content, you simply share it via a URL. Then your contacts access the content via any device—including desktop, tablet or mobile—and via any electronic communication channel: real-time chat, InMail and more.



Plus, once you create one PointDrive, you can easily copy and reuse it. As LinkedIn Account Manager Lauren Kelley says, "PointDrive is incredibly easy to use, allowing me to use templates for things like renewal proposals or presentations. Rather than start from scratch each time, I save each PointDrive, update it with the correct collateral and content, and I'm done. It's a huge time saver." It's also easy for your team to circulate what they're sharing via PointDrive—and for you to reuse these existing PointDrives.

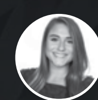
Deliver better client experiences

PointDrive ensures you no longer bog down your contacts with emails that are a pain to navigate, containing a bunch of attachments that can be a headache to download and share. As Tessa Davis, Senior Client Solutions Manager for LinkedIn Marketing Solutions, says, "Even if I'm sharing a lot of information with a client, PointDrive makes it easy for them to download and digest. It's an amazing resource hub for our clients."

According Nick Maalouf, Senior Client Solutions Manager for LinkedIn Marketing Solutions, this sleek packaging increases content consumption. "I find that my contacts are more likely to open and view the content if I send via PointDrive versus via email."

Lauren Staniec, Regional Account Manager, LinkedIn, concurs. She keeps her renewal documents, quarterly business reviews, and sales manager playbooks in PointDrive. "With everything hubbed in one location, it's easy for my clients to pop in whenever they like. I see customers visit PointDrives three or four months after we've reviewed a presentation. So not only is it a valuable resource for them, it helps me see when clients are bought in. I love PointDrive. It's my favorite Sales Navigator feature."

> "PointDrive streamlines follow-ups with accounts. It makes our lives so much easier."



– Chelsea Rawlins, Senior CSM, LMS

Confidently gauge interest

As Lauren underscored, PointDrive provides you with insight into whether or not the recipient opened, consumed, and shared the content. Pamela Tsao, LinkedIn Sales Solutions Consultant, agrees that PointDrive makes it possible to gauge a contact's interest. "I can see if my clients are opening and sharing my attachments with others in their company," she says.

In fact, you can see how long someone looked at a certain page or slide or presentation. It can be just as valuable knowing a client did not yet look at a PointDrive, as Maggie Williams, Renewal Specialist, LSS, explains. "When clients open my PointDrives, it points to their interests, which helps know where to focus my future discussions with them. At the same time, if I see they didn't open a PointDrive, such as one containing a pricing proposal, I'll use that insight to guide my follow-up call with them."

Grow your network

As Nick Maalouf explains, this visibility can lead to expanded reach within an account. "When my PointDrives are passed around an organization, I can see who is looking at them. If I don't know someone in that circle, it's a potential new contact for me."

"I can see if my clients are opening and sharing my attachments with others in their company."

– Pamela Tsao, Consultant, LSS

CHAPTER 4

Real-Time Sales Updates: Stay on Top of News at Your Clients

Real-Time Sales Updates

Connecting at just the right time can mean the difference between seizing an opportunity and losing out to the competition.

Sales Navigator notifies you about your contacts' activities, giving you a reminder and reason to reach out. You effortlessly stay up-to-date on what's happening with the people and companies you're interested in through five types of alerts offered on your homepage and via email:

- **Lead Updates:** Be one of the first to know when your contacts change roles, have a work anniversary or connects with someone in your network.
- **Shares:** Understand what your contacts care about by seeing their professional shares on LinkedIn.
- **Company Updates:** Receive key information about your accounts as they post to their Linkedin.com Company Page.
- **In the News:** See when people or companies are mentioned in the news, sourced from sites across the web.
- **Potential Leads:** Identify new potential contacts or decision makers when accounts make new key hires.

Keep up with account changes

Real-time sales updates keep you in the know on movement within your accounts. As Maggie Williams, Renewal Specialist for LinkedIn Sales Solutions, explains, “It’s an effective way to stay on top of your clients. That’s especially important if you work with accounts that experience a lot of talent turnover.” Maggie relies on Sales Navigator to show her who took over a role and to understand how she can get introduced to a new point of contact.

Shape conversations

Connecting with relevance is key to building relationships for the long haul and giving your clients a reason to welcome your outreach. Real-time sales updates supplies you with the insights you need to position yourself as a client ally who engages in meaningful discussions.

Chelsea Rawlins, Senior CSM for LinkedIn Marketing Solutions, uses real-time updates to keep pace with what’s trending within her accounts. “By staying on top of what my accounts are doing and sharing, I know how to steer my conversations with them.”

With automated insights pushed to her, Lauren Kelley, Senior Account Manager for LinkedIn Sales Solutions, stays aware of relevant account news and job changes. “This allows me to be much more strategic in my outreach and shows that I understand my clients’ business.”

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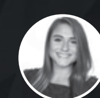


– Chelsea Rawlins, Senior CSM, LMS

Drive more purchases

Steve Ertmer, CSM, LMS, has seen firsthand how this can guide contacts down the path to purchase. Seeing what his accounts' senior leadership shares and the type of updates they post points to where their business is going and what interests them. It's then a jumping-off point for Steve's weekly discussions with his client contacts, helping direct the conversation. In fact, he upsold $100,000 because of a share he saw from an account's CMO.

Gain first-mover advantage—even on the go

Using the Sales Navigator mobile app, you can keep track of all updates and intent signals while standing in line at the coffee shop, waiting to board a flight, or checking into your hotel. When you sign in, the most pressing and actionable alerts will appear at the top of your feed. Whether you see a spike in hires or the announcement of a strategic initiative, these alerts enable you to jump on opportunities immediately.

Pro Tip:

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

> "Real-Time sales updates is my favorite feature within Sales Navigator. It's incredibly powerful to approach a client and be able to use a data point like increase in headcount to talk about the account's growth and use that as a way to position the need for additional seats."

– John Hopkins, Renewal Specialist, LSS

CHAPTER 5

InMail Messages: A More Effective Way of Communicating

InMail Messages

When it comes time for outreach, InMail messages are one of the most credible (and successful) channels for sales professionals to directly contact customers.

In fact, you can reach your contacts directly and credibly with InMail, even if you don't have their email address.

Stay in touch

When a key contact leaves your account, it can leave you scrambling to find the right person to see a renewal or other contractual issue through to completion. InMail eliminates the problem that arises when you can no longer reach out to your main contact using their work email and you don't have their personal contact information. By sending a message via InMail, you'll be sure to reach your contact, so you can identify the new decision maker.

Solicit success stories

As renewals and quarterly business reviews approach, you're wise to identify all the ways your accounts are succeeding by using your company's solution. Tear this page from Lauren Staniec's, Regional Account Manager, LinkedIn, playbook. She solicits feedback from her accounts' power users to hear about their successes, and then bakes these findings into her presentations to her main point of contact.

Rack up more responses and meetings

Unlike email where you're competing with a crowded inbox, people are more likely to respond to InMails because they receive fewer of them. That's precisely the experience of Maggie Williams, Renewal Specialist for LinkedIn Sales Solutions. "I get more responses via InMail, especially with accounts that are at risk of canceling. When I email these accounts, I often won't hear back. But if I then contact them via InMail, I get responses about 50% of the time."

Pro Tip:

InMail's real-time delivery feature ensures your message will appear at the top of a person's inbox when they are most likely to see it. Just be sure to reach out with relevance, such as by mentioning something you noticed in their profile or read about them in the news.

"I get more responses via InMail, especially with accounts that are at risk of canceling. When I email these accounts, I often won't hear back. But if I then contact them via InMail, I get responses about 50% of the time."

– Maggie Williams, Renewal Specialist, LSS

CHAPTER 6

CRM Integration: Effortlessly Keep Track of Your Accounts

CRM Integration

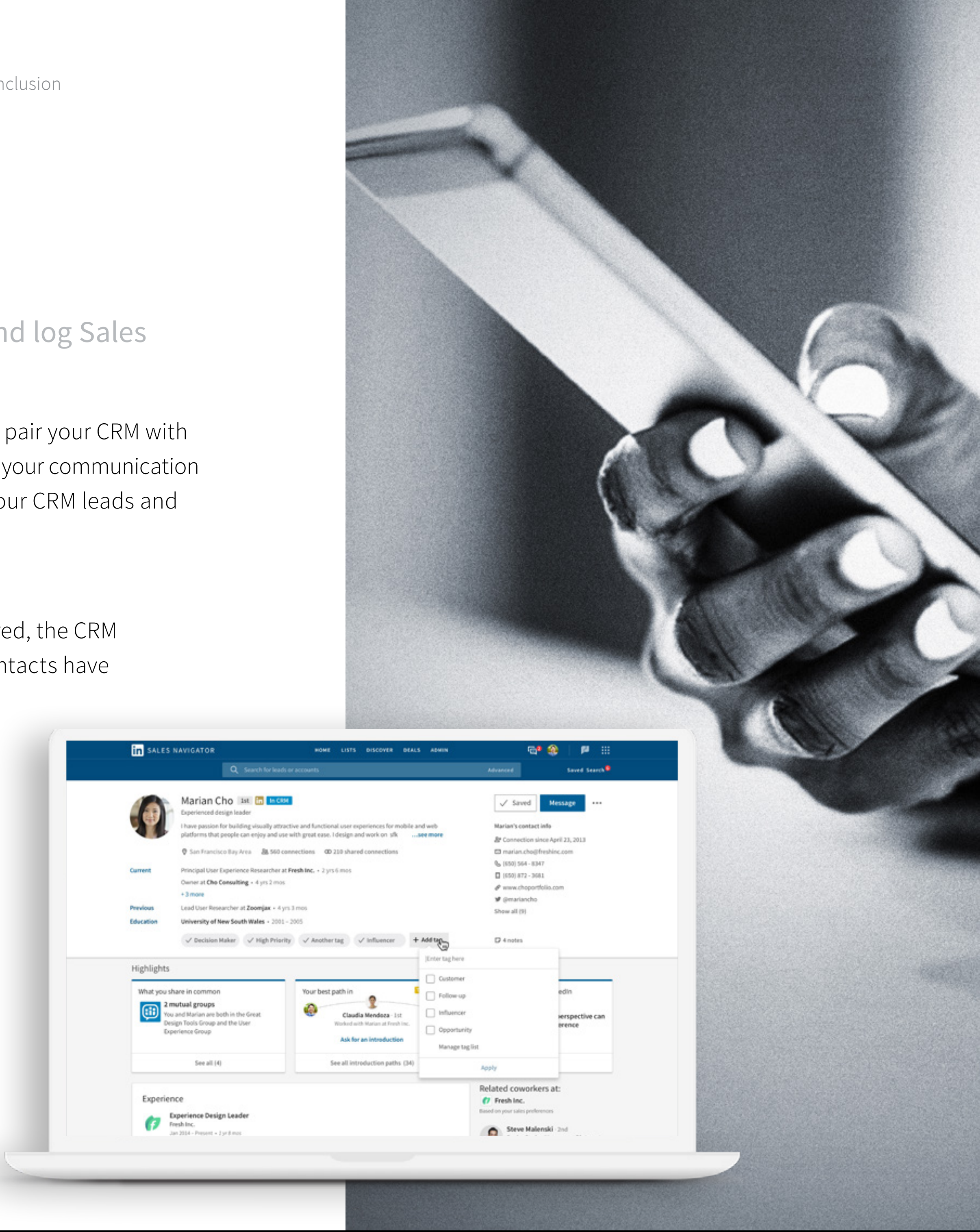
Automatically save your contacts and accounts, and log Sales Navigator activity to CRM in a single click.

Sales Navigator has CRM integration capabilities that allow you to pair your CRM with Sales Navigator to create a super system. You can automatically link your communication on LinkedIn—InMail, notes, messages—into your CRM, and pull your CRM leads and accounts into Sales Navigator.

Keep track of interactions and account changes

As Pamela Tsao, LinkedIn Sales Solutions Consultant has discovered, the CRM integration makes it possible to see previous interactions your contacts have had with you or someone else within your company.

This CRM integration also helps you track what's happening within your accounts. According to Lauren Staniec, Regional Account Manager for LinkedIn, tracking job changes across accounts means she can keep current accounts on track and identify new opportunities as her previous contacts join new companies.



Easily find ways to make contact

Every account assigned to you in your CRM system is automatically saved in Sales Navigator. If you come across a potential contact in Sales Navigator, you'll find out automatically if that person's name is already saved in your CRM system. In most cases, that person's email address will already be captured.

Minimize data entry and data lookup

Even as you take notes, send InMails or place calls from the Sales Navigator mobile app, you can write them as activities to your CRM with a single mouse click. This gives Sales and Operations leaders an easy way to get their reps' Sales Navigator activity recorded in CRM.*

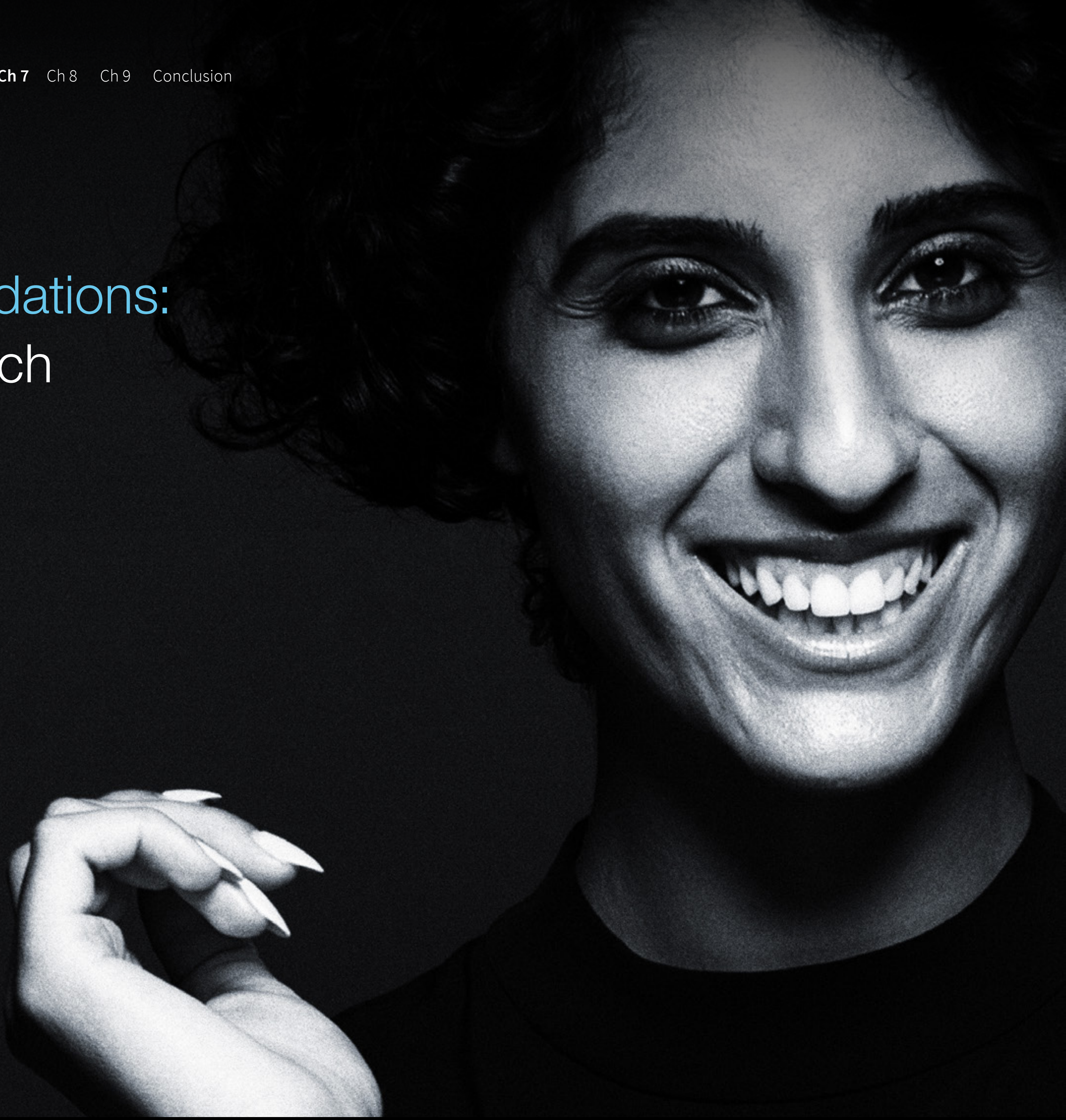
With this integration, you can also have access to embedded displays, which provide a wealth of information. You'll see company profile information that gives you a quick overview of recommended leads, company news, and a list of your current connections. The "icebreaker" tab offers summaries about your contacts, such as articles they've shared, mentions in the news, and job changes. Under the "get introduced" tab, you'll find people in your network who can introduce you to new contacts, offering a straightforward way to expand your reach within an account.

Even when your accounts don't regularly update their LinkedIn Company Pages, you can use the widget to look for key stakeholders within the organization and see what they're sharing to get a sense of their issues and concerns.

**Note that contact information is not shared in the sync between Sales Navigator and a CRM system.*

CHAPTER 7

Lead Recommendations: Expand Your Reach



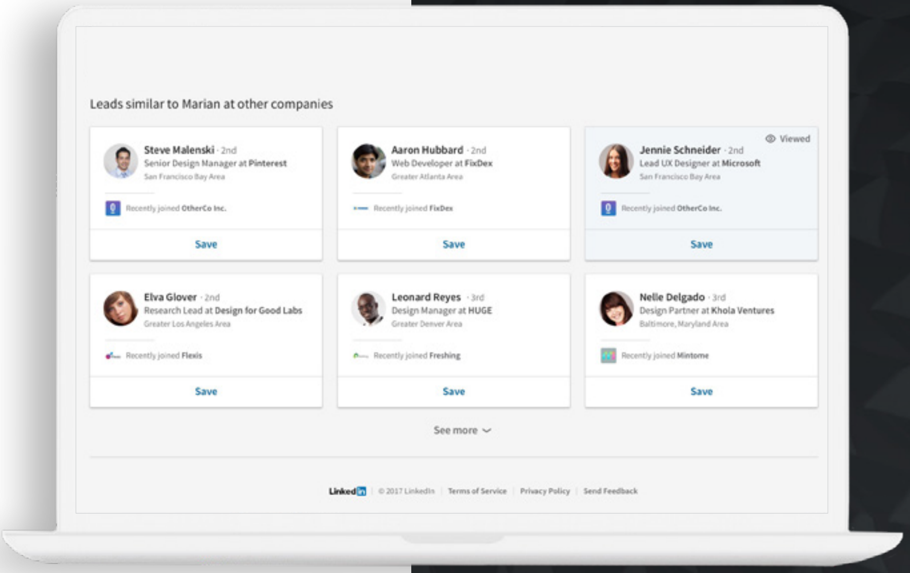
Lead Recommendations

Quickly discover the right people within your accounts, with suggestions customized for you.

Account expansion isn't just a matter of selling more to your existing contacts; it's about expanding your company's footprint by selling to new stakeholders. Sales Navigator makes it easy to find the next most promising buyers within your existing accounts.

Once you've engaged one line of business or department, Lead Recommendations will feed you relevant suggestions for additional people within the company using algorithms. The tool learns from your past searches and automatically combs LinkedIn for lead recommendations relevant to your search criteria. The more active you are in Sales Navigator, the more relevant your results will be, so you can quickly discover the right people to approach.

Lauren Staniec, Regional Account Manager for LinkedIn, frequently uses the recommendation tool to great effect. "I want to make sure that I'm looking at the right people when I'm researching my accounts. Lead Recommendations in Sales Navigator helps me keep track of new decision makers within my accounts."



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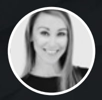


– Lauren Staniec, Regional Account Manager, LinkedIn

CHAPTER 8

TeamLink: Discover Connection Pathways

TeamLink

Uncover the best ways to connect with account stakeholders through your company’s combined network.

Sales Navigator’s TeamLink feature automatically surfaces connections within your accounts and your coworkers, helping you identify the best way to get introduced. You’ll see connections with everyone in your company—even if you’re directly not connected to those colleagues on LinkedIn. That makes it an effective way to expand your reach within an account.

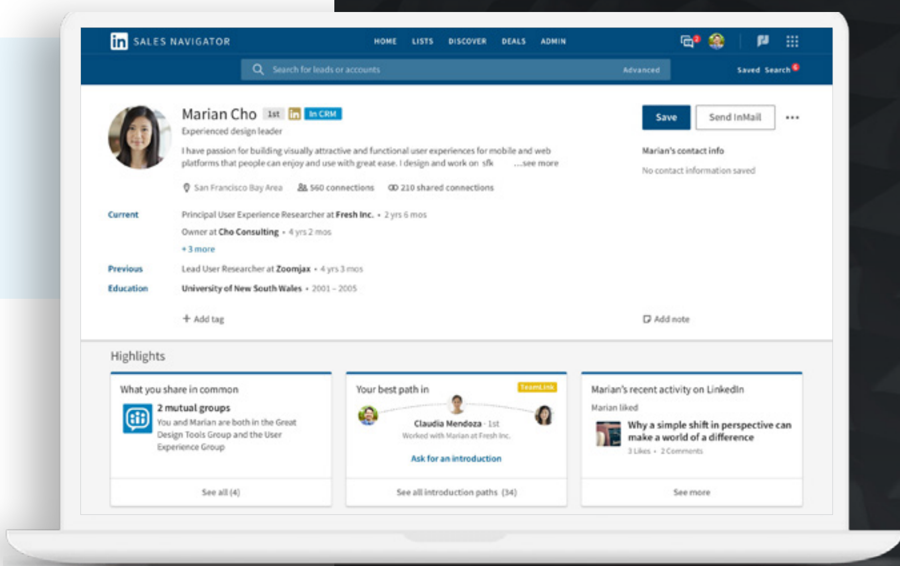
In addition to revealing connection pathways, TeamLink also highlights commonalities that might help facilitate a conversation, such as sharing an alma mater or a previous employer.

4.7m

At LinkedIn, our reps average 1,490 connections. But through the power of TeamLink, they’re able to find warm introductions into as many as 4.7 million people.

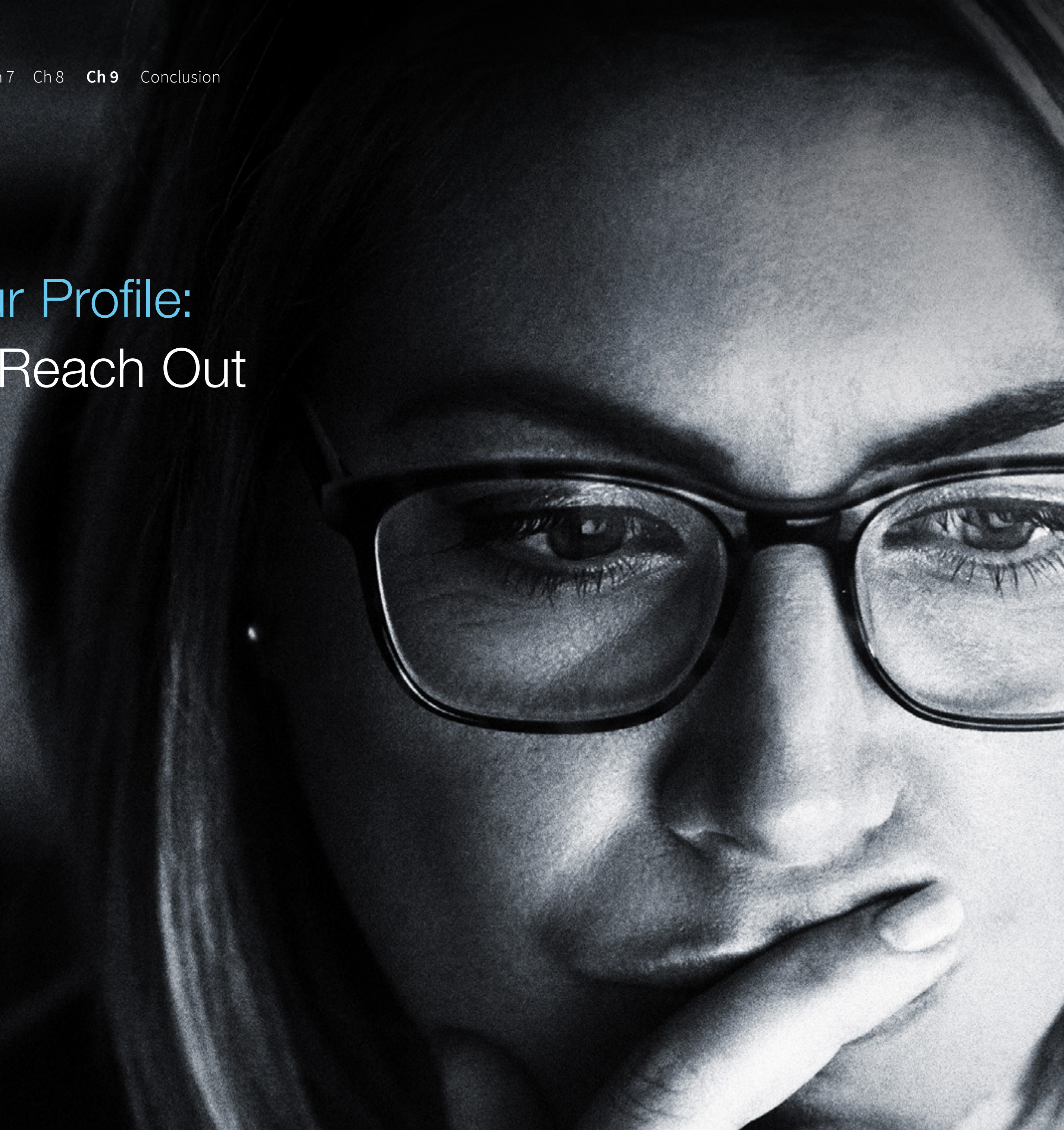
> “TeamLink is incredibly valuable for me because I can easily identify which of my colleagues can introduce me to new contacts.”

– John Hopkins, Renewal Specialist, LSS



CHAPTER 9

Who's Viewed Your Profile: Gain a Reason to Reach Out



Who's Viewed Your Profile

View the expanded list of who's viewed your profile in the last 90 days.

Curiosity leads many of us to view the LinkedIn profiles of those professionals that have viewed us. You can use that knowledge to your advantage.

Here's how Lauren Staniec, Regional Account Manager for LinkedIn, does just that. When account contacts haven't been responsive to her outreach but she notices they've viewed her profile, she uses that to trigger a follow-up a couple of days later.

In one case, she was managing a growing account, with many new decision makers coming on board. When she saw that one of these has viewed her profile, she mentioned it to an existing account contact. "I asked if it would make sense to loop the new decision maker into our conversations, or for my contact to make an introduction. This made it seamless for me to expand my reach within the account."

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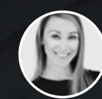
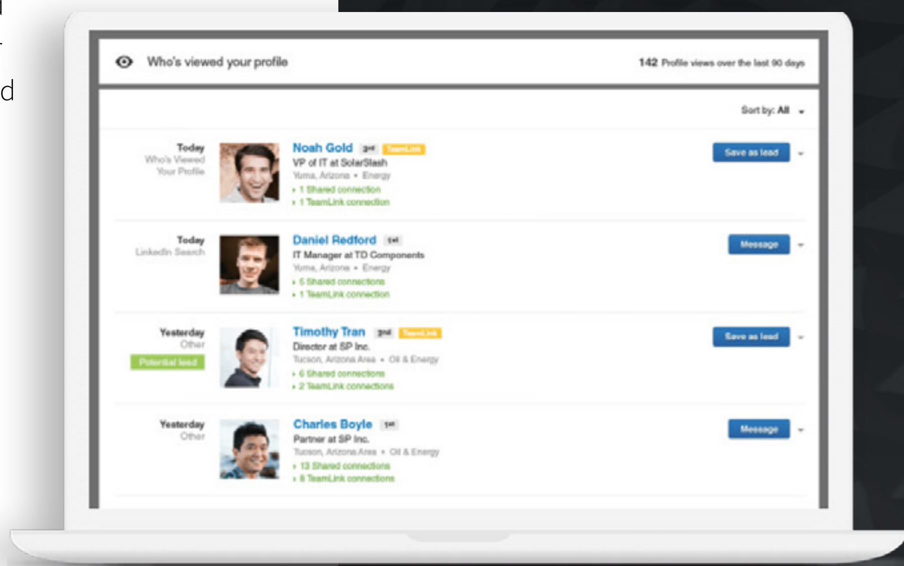


– Lauren Staniec, Regional Account Manager, LinkedIn



Conclusion

Whether you're an account manager or client solutions manager, it's unwise to stand by silently, waiting for your contacts to get in touch.

Even when business is good, you can always do more to strengthen your relationships and position your own company as a trusted partner. By strategically monitoring your accounts, consistently engaging your key contacts, and expanding your reach, you'll get closer to your accounts.

LinkedIn Sales Navigator is the way you get closer. Account managers and customer success managers on Sales Navigator are engaging more contacts within their accounts more effectively than their peers who are not using this powerful solution. They are gaining insights that pave the way for more meaningful interactions, and more renewals and new business.

In other words, Sales Navigator gets you closer to the decision makers and champions who influence add-on purchases.

"Everyone in the sales profession needs Sales Navigator. It's a really good productivity tool."

– Rae Jones, Account Executive, LSS

1. https://business.linkedin.com/sales-solutions/webinars/18/07/strategies-for-successful-account-management/3qb