LinkedIn Sales Navigator: CRM Sync for HubSpot's Smart CRM Enablement Guide

1. Introduction

LinkedIn Sales Navigator helps you find the right prospects faster with customized, sales-specific insights like lead recommendations, company updates, and more. Click here to read an overview of LinkedIn Sales Navigator. One of the features of LinkedIn Sales Navigator is CRM Sync – integration with HubSpot's Smart CRM.

By connecting HubSpot with LinkedIn Sales Navigator via CRM Sync, you can access key CRM-powered integrations, including:

- **CRM Embedded Experiences - Find Key People:** Enable sellers to leverage more accurate data and insights to prioritize high-potential accounts, develop key buyer relationships, and uncover hidden allies and timely intel for effective outreach - all without leaving the CRM.
- **Next Generation Data Validation:** Identify when CRM contacts are out-of-date using LinkedIn data.
- **Contact Creation and Updates**: Create new or update existing CRM contacts using Sales Navigator data both from Sales Navigator into your CRM and from the Embedded Experience into your CRM.
- **Activity Writeback**: Automatically log key Sales Navigator activities (i.e., InMails, Messages sent, Notes logged, connection requests sent, SmartLink views) to CRM.
- **Search Filters:** Include or exclude your CRM contacts and accounts when performing Sales Navigator searches.
- **Auto-Save**: Automatically save Accounts and Contacts associated with a user to My CRM Accounts and My CRM Leads and Contacts.
- **Sales Navigator System Generated Lists**
    - **Past Customers at New Companies System Generated List**: List of past customers associated with your company's closed-won opportunities now at new companies in your book of business.
    - **Contacts Who Have Left Open Opportunities System Generated List**: List of contacts from your CRM who are associated with open opportunities that you own and have changed to a new company based on their LinkedIn profile while the opportunity is still open.
- **ROI Reporting:** The ROI report includes an aggregate-level view of how selling via Sales Navigator and LinkedIn impacts the business closed by your reps. ROI reporting includes Sales Navigator activities like account and lead searches, Add Notes, and View Lists. As part of ROI reports, you can also view opportunities influenced by Sales Navigator users who own leads/contacts associated with closed or won opportunities. Please contact your LinkedIn representative to access this report.

CRM Sync features are available only with Sales Navigator Advanced Plus edition.

Note: You can connect to a CRM Sandbox environment to initially test CRM Sync with Sales Navigator and/or test new CRM features before releasing to all your users. To know more, visit this **help center article**.

This guide will walk you through the process of enabling CRM Sync between HubSpot's Smart CRM and LinkedIn Sales Navigator.

2. Prerequisites for enabling CRM Sync with HubSpot's Smart CRM

You must have access to the following items before you can enable CRM Sync with HubSpot's Smart CRM:

- Sales Navigator Advanced Plus edition
- Sales Hub Pro or higher license in HubSpot
- You are an admin in Sales Navigator and in HubSpot

Important to know: We recommend that you install Embedded Profiles before installing CRM Sync as this ensures you're receiving the complete Sales Navigator experience.

If you have already synced LinkedIn Campaign Manager with HubSpot and would like to sync with Sales Navigator, you must complete the following steps:

1. Disconnect LinkedIn Campaign Manager from HubSpot.
2. Sync with Sales Navigator using the steps in this enablement guide.
3. Reconnect LinkedIn Campaign Manager with HubSpot.

3. Set up Embedded Profiles and Embedded Experiences

This section highlights the procedures to set up Embedded Profiles and Embedded Experiences.

3.1 Set up Embedded Profiles

Embedded Profiles allow you to easily view LinkedIn information within your CRM application to save time toggling between platforms.

Prerequisites

- Sales Navigator Advanced or Advanced Plus edition
- HubSpot Sales Pro or Enterprise edition

To install Embedded Profiles, every user, (including admins) must install the LinkedIn Sales Navigator app from the HubSpot App Marketplace.

For detailed instructions, see **Install Embedded Profiles for HubSpot users** help center article.

3.2 Set up Embedded Experiences

Prerequisites

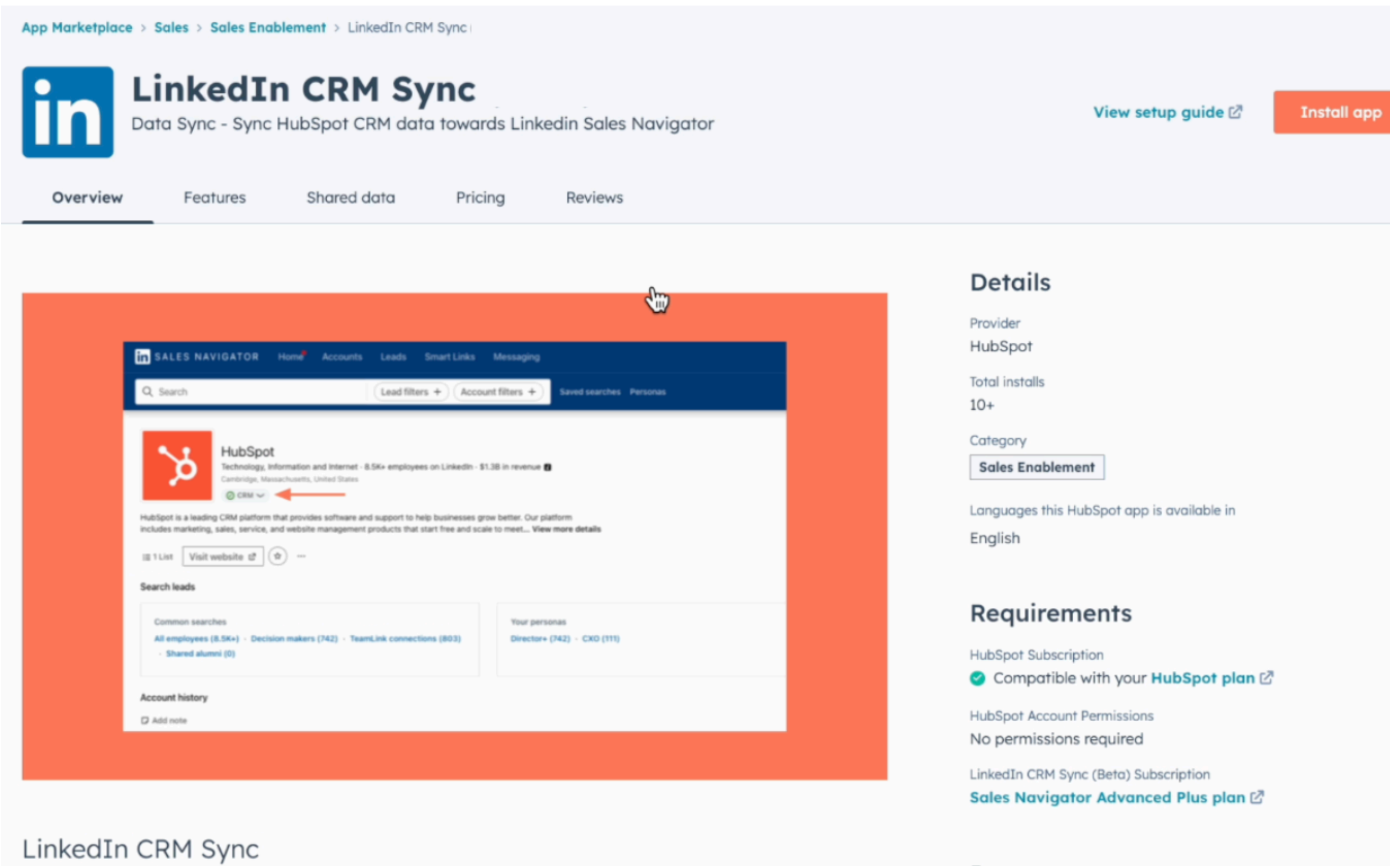
- Sales Navigator Advanced Plus edition
- HubSpot Pro or Enterprise

If Embedded Profiles is set up, there is no further action needed from you to set up Embedded Experiences. But, if Embedded Profiles is not set up, please follow the instructions in section 3.1.

4. Set up CRM Sync with HubSpot's Smart CRM

Follow these steps to set up CRM Sync with HubSpot's Smart CRM:

1. On the HubSpot App Marketplace, install the LinkedIn CRM Sync package.

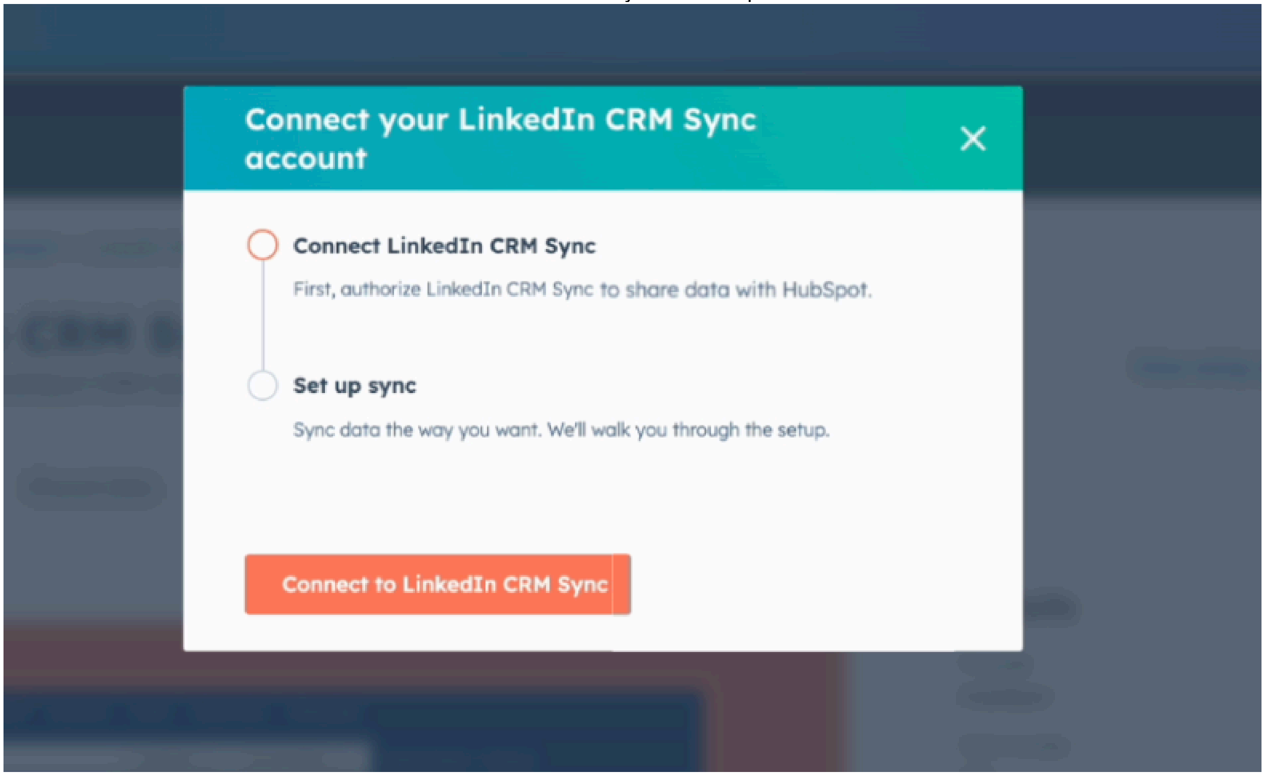


2. From the left pane, under **Account Setup**, expand **Integrations** and click **Connected Apps**.

You should see **LinkedIn CRM Sync** displayed under **Add LinkedIn integration**.

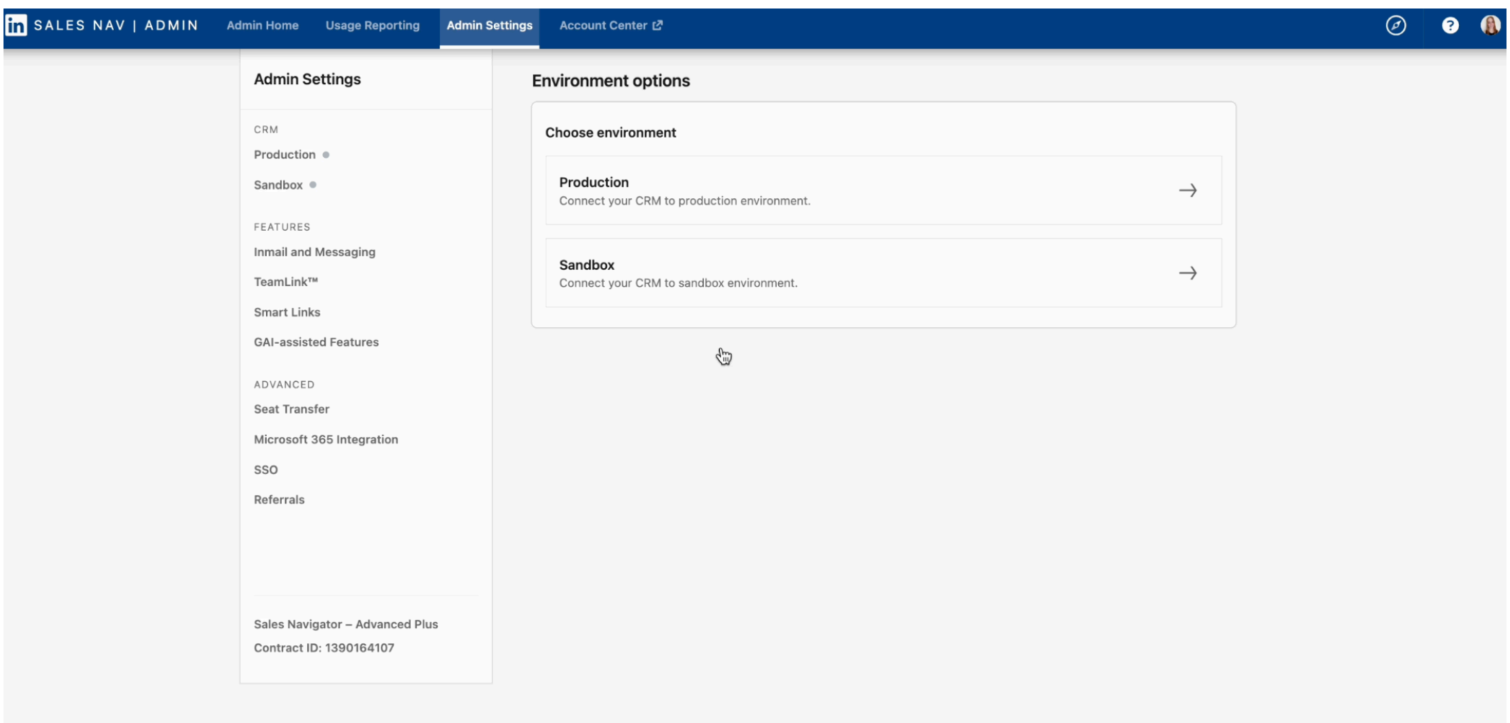
3. Click **Connect**. You are prompted to sign in to LinkedIn Sales Navigator.

4. Enter your user credentials to sign in to LinkedIn Sales Navigator. If you are associated with multiple Sales Navigator contracts, you are prompted to choose a specific contract.



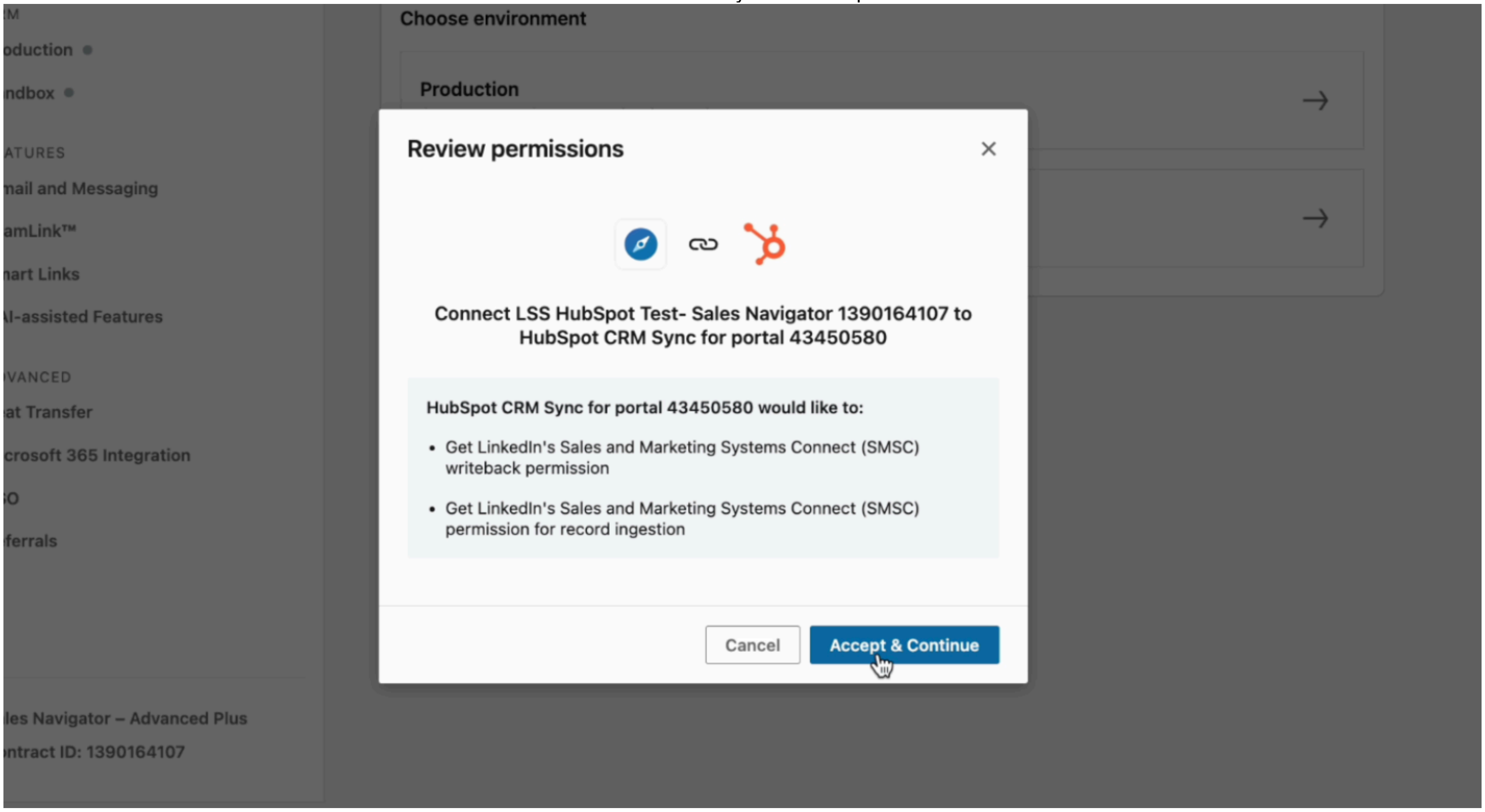
5. After selecting a contract, you are signed in to LinkedIn Sales Navigator.

6. Choose a CRM environment. It can be **Production** or **Sandbox**.



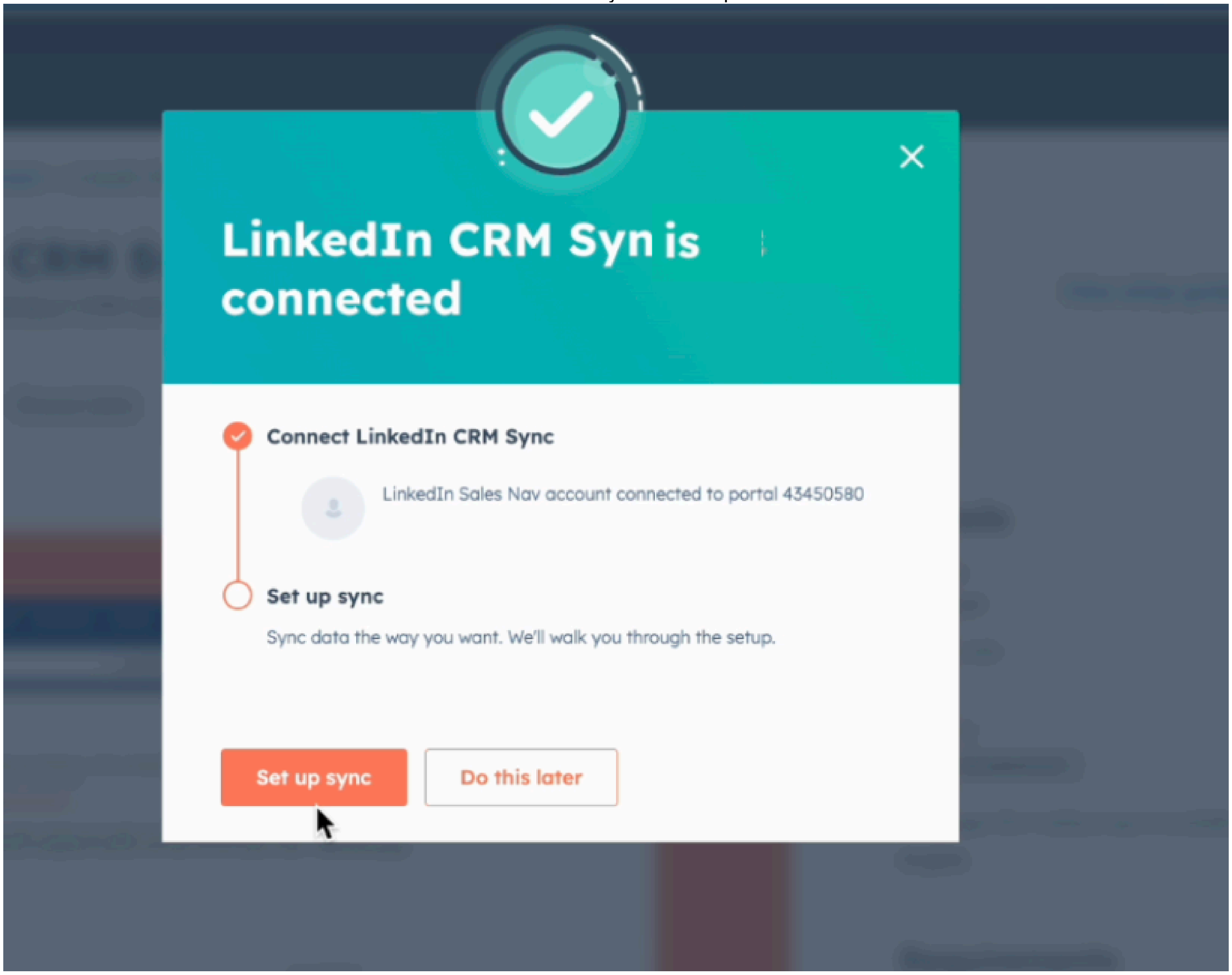
7. After you select an environment, you are prompted to review permissions.

8. Click **Accept & continue**.



At this point, Sales Navigator will initiate the CRM connection pairing with HubSpot. When the pairing is complete, you will see a confirmation message.

9. You are redirected to HubSpot to complete the CRM Sync setup.

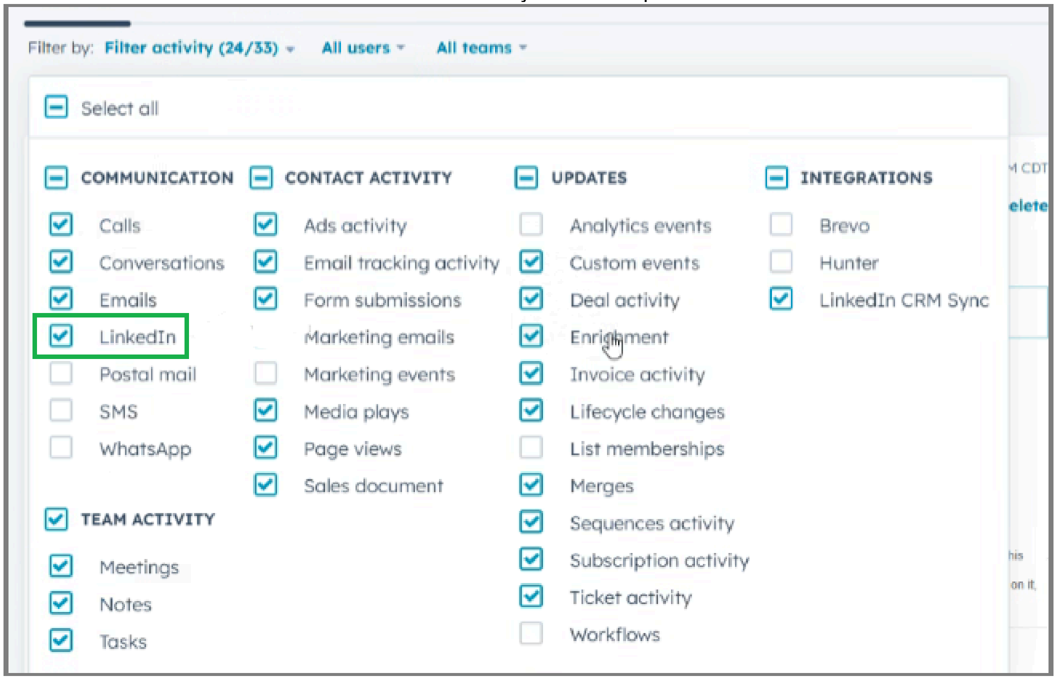


5. Set up User Writeback Authentication

CRM Activity Writeback allows users to automatically update HubSpot with Sales Navigator activity, including InMails, notes, and connection requests. See more information on what data is logged in section **Sales Navigator Activity Writeback Fields in your CRM**.

Important to know

To view LinkedIn Writeback activity in HubSpot, ensure the LinkedIn option is selected in the **Filter By: Filter Activity** setting. This ensures the activity appears in the timeline history.



To enable CRM Activity Writeback:

1. Click **Settings**.
2. Click **CRM Settings**.
3. Click **Connect to CRM**.

6. Data shared between HubSpot's Smart CRM and LinkedIn Sales Navigator

Following data from HubSpot is shared with LinkedIn Sales Navigator:

- Contacts
- Companies
- Deals
- Owners

Following table displays how syncing CRM data towards LinkedIn affects your use of LinkedIn Sales Navigator:

Objects in HubSpot	Matches to LinkedIn Terminology	To enable in Sales Navigator
Contacts	Leads	Leads in Sales Navigator will match automatically. You can immediately identify whether a contact/lead exists in HubSpot using the CRM Badges feature. If no match is found, you can find a match or a create a new HubSpot contact directly from within Sales Navigator. You will need to provide an email address and attach the contact to an account, if the setting is enabled.

Companies	Accounts	Similar to leads, the CRM Badge on accounts will show whether there is a match or not. It will also allow you to edit a match in case it was matched with an incorrect company in HubSpot.
Deals	Opportunities	Deals can sync to LinkedIn Sales Navigator for better visibility.
Owners	Not applicable	Displays who, in the CRM, owns account, lead, and opportunity records. Also, it helps connect users in HubSpot and LinkedIn for verification.

7. Permissions for other actions in Sales Navigator

This section elaborates on permissions for other actions and tasks that you perform in LinkedIn Sales Navigator.

- Lead Creation, Contact Creation, and Activity Writeback requires users to individually authenticate (user-auth) with the CRM. This is in addition to admin-level authentication.
- CRM user-auth is enabled only if Admins have enabled CRM Sync on their contract.
- CRM user-auth is available for both production and sandbox environments. You can connect to a CRM Sandbox environment to initially test CRM Sync with Sales Navigator and/or test new CRM features before releasing to all your users. To learn more, visit this **help center article**.
- The ability to update leads and contacts requires the user to have read and write permissions over the lead or contact. Sales Navigator respects CRM permissions, and if the user doesn't have the correct permissions to update the lead or contact in CRM, they won't be able to do so on Sales Navigator. To learn more, visit this **help center article**.
- CRM Writeback and contact creation is available to all Sales Navigator end users only if the admin on their contract has enabled these features for them from the Admin Settings page.
- For Activity Writeback, a user is prompted to authenticate with the CRM in the following scenarios:
  - While attempting to writeback an activity to the CRM and has not connected to the CRM before.
  - While creating a contact and has not connected to the CRM before and
  - While accessing the User Settings page to either connect or disconnect user-authentication for contact creation or activity writeback.
- All Sales Navigator users must authenticate with the CRM to use enable activity writeback.

8. Sales Navigator Activity Writeback Fields in your CRM

The following table describes the format in which Sales Navigator fields will appear in your CRM as part of Activity writeback:

Field Name	Sales Navigator InMail	Sales Navigator Message Sent	Smart Links	Call Logging	Notes on a Lead	Notes on a Contact	Connection Requests Sent
Subject	InMails sent and received from Sales Navigator – [Subject lines created by Sales Navigator user]	Messages sent and received from Sales Navigator	Smart Link View from Sales Navigator	Phone Call from Sales Navigator	Notes from Sales Navigator	Notes from Sales Navigator	Connection requests sent from Sales Navigator

9. Troubleshooting

I want to sync Sales Navigator with HubSpot, but Campaign Manager is already synced

If you have already synced LinkedIn Campaign Manager with HubSpot and would like to sync with Sales Navigator, you must complete the following steps:

1. Disconnect LinkedIn Campaign Manager from HubSpot.
2. Sync with Sales Navigator using the steps in this enablement guide.
3. Reconnect LinkedIn Campaign Manager with HubSpot.

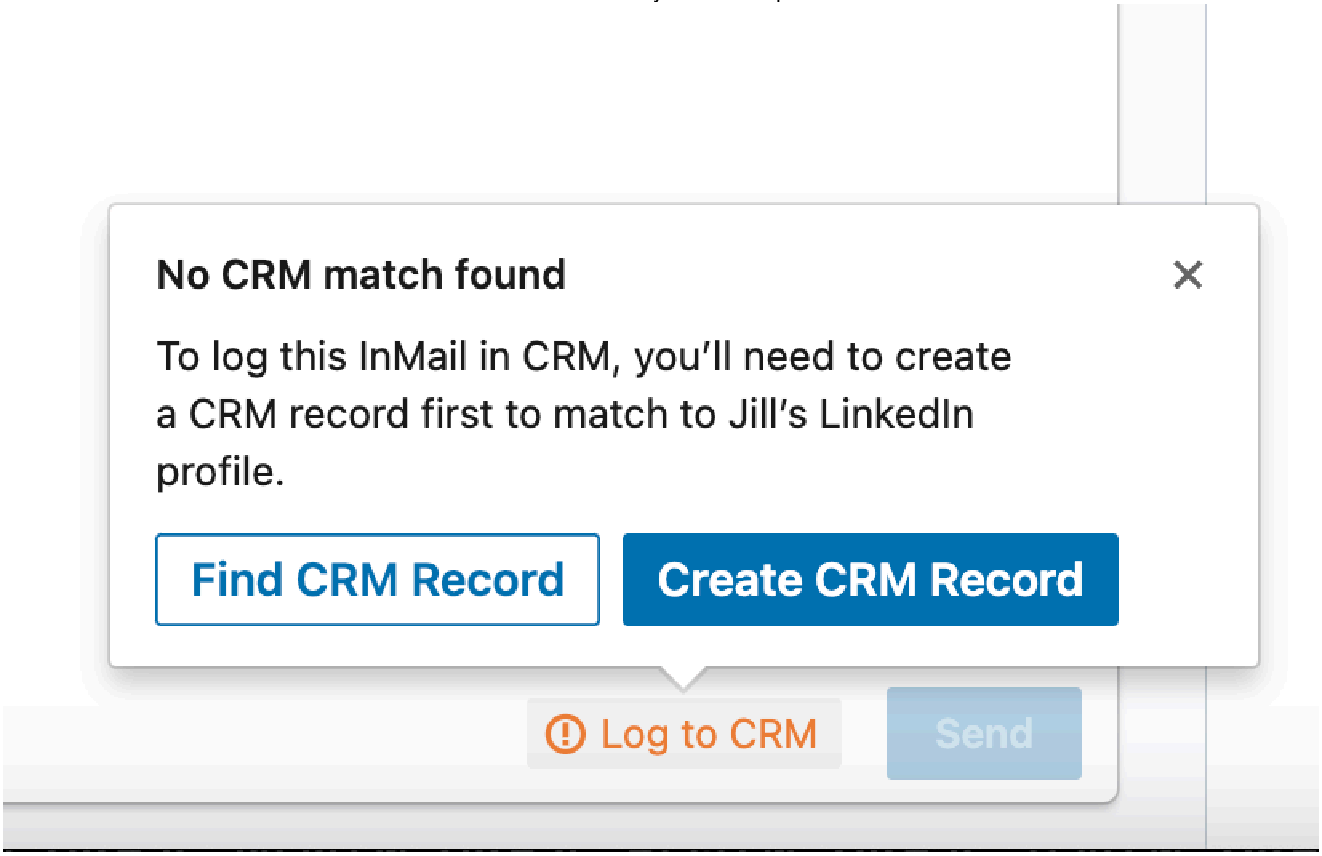
I want to verify that data is written back to the right CRM record

While performing writeback to the CRM, you can ensure that the data is written back to the right record in the CRM. Previously, you had manually correct the errors in the CRM. But now, you can correct records directly from Sales Navigator.

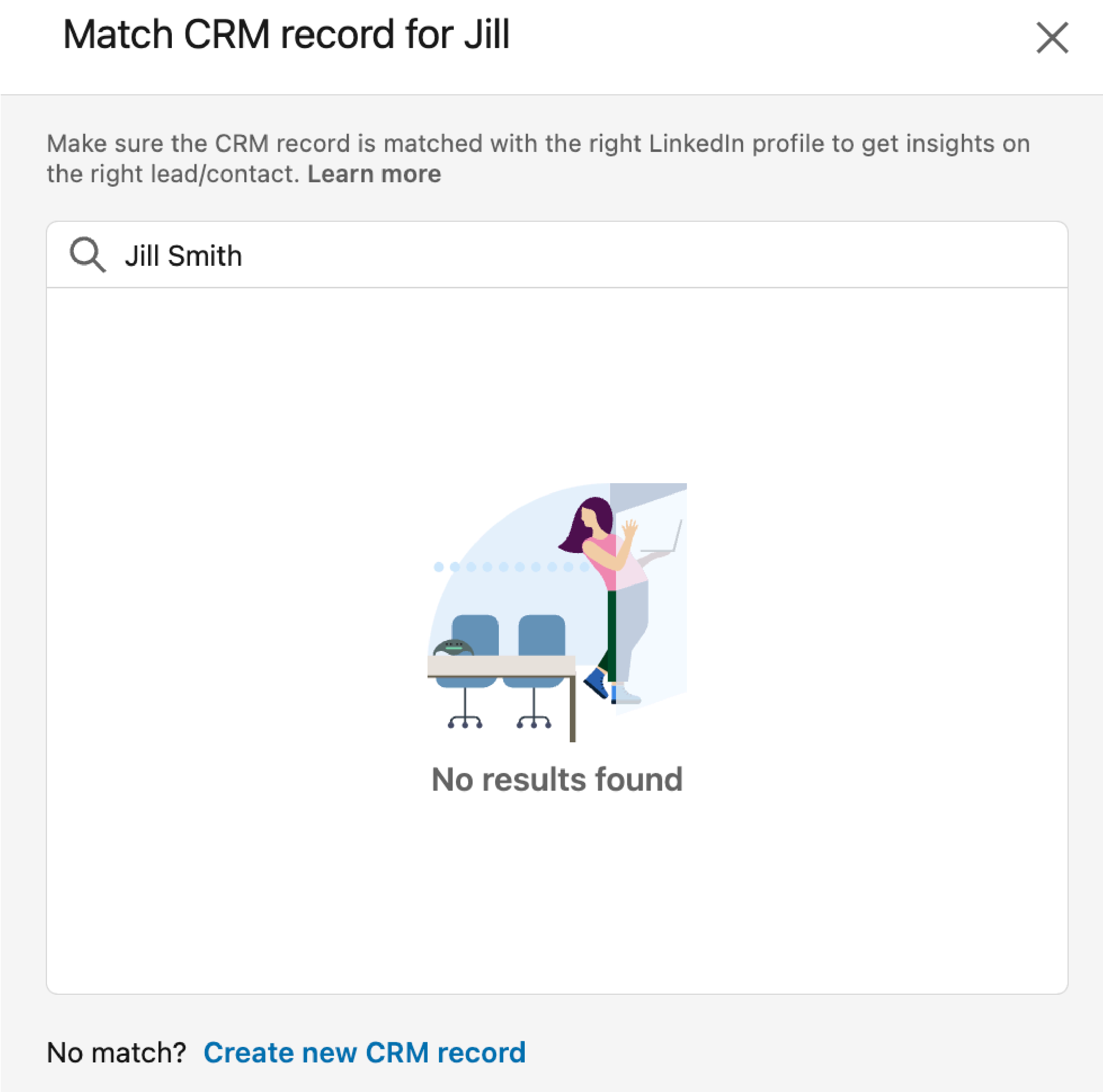
The steps in this procedure assume that you are matching a record while sending a message to a lead or contact.

1. Click the **Log to CRM** option.

   You are prompted to choose if you want to **Find CRM record** or **Create CRM record**.



2. If you think the record already exists, click **Find CRM record** to see if there is a match, and then click **Yes**. If no match appears, or if you think this is an incorrect match, click **Create new CRM record**.



3. Complete the necessary fields and click **Create**.

4. Click **Send** to send your message. You will notice that the **Log to CRM** option is also enabled. Click here to view more information on CRM matching logic.

10. Security information

For information on the security of Sales Navigator CRM Sync for HubSpot, please review the HubSpot whitepaper available **here**.

11. Additional Resources

- **LinkedIn Sales Navigator Help Center**
- **Enable CRM Embedded Experiences on HubSpot**
- **Install Embedded Profiles for HubSpot users**