SALES PLAYBOOK

LinkedIn Sales Navigator + HubSpot Playbook

A simple, do-this-then-that guide to keeping your key accounts visible, catching the right signals, and finding new accounts and people — with everything flowing into HubSpot.

BEFORE YOU START

Install the LinkedIn Sales Navigator app from the HubSpot App Marketplace, then authenticate your Sales Navigator account. A Sales Navigator card will appear inside your HubSpot contact and company records. Turn on data sync so updates stay consistent across both tools. The deepest two-way sync (CRM alerts, writing activity back to HubSpot) requires a Sales Navigator Advanced Plus seat.[1]

Prepared for Amy Anderson · Rise and Rooted · July 2026

SECTION 01

Make Your Key Accounts Visible

Everything in Sales Navigator revolves around saved accounts and saved leads. If an account isn't saved, you get no alerts, no insights, and nothing syncs to HubSpot. Save first — then everything else works.

1. **Build one Account List for your key accounts**
   From the Sales Navigator homepage, go to Lists → Account lists → Create list. Name it something plain like “Key Accounts 2026.”

2. **Add your accounts**
   Search a company, open its account page, and click Save → choose your list. Or bulk-add from any account search using the checkboxes and Save to list.

3. **Sync your HubSpot book of business**
   With CRM Sync enabled, Sales Navigator can pull your HubSpot companies in as a list so your key accounts stay matched to their HubSpot records automatically.[1] This keeps both systems pointing at the same accounts.

4. **Confirm the card shows in HubSpot**
   Open any of those companies in HubSpot — the Sales Navigator card should display the account's live LinkedIn insights right on the record.[1]

> Keep it simple: One list of key accounts is enough to start. Don't build ten lists — you'll just stop maintaining them. Save the account, and visibility follows.

SECTION 02

Turn On the Right Notifications

Once accounts and leads are saved, Sales Navigator watches them for you and posts updates to your Alerts feed on the homepage. Alerts are available on every Sales Navigator plan; with Advanced Plus they also appear inside HubSpot's embedded experience.[2]

The alerts worth acting on

Signal	What it tells you
Account raised money / accelerating growth	New budget and hiring — a live buying window.
Account preparing to grow	Job postings up over the last 90 days.
Senior hire / new decision maker	A director+ just joined — fresh entry point.
Lead changed jobs or roles	Your champion moved — follow them to a new account.
Buyer intent	Someone at a saved account viewed your page or site.
Account merger / acquisition	Ownership change — priorities and budgets shift.

1. ### Enable job-change alerts in Settings

   Go to Settings → Email preferences and turn on Top Weekly Notifications. Under Activity about saved leads, turn on both “a lead started a position at a new company” and “...at the same company.”[2]

2. ### Install the LinkedIn Insight Tag for buyer intent

   To get alerts when a prospect visits your website, add the free LinkedIn Insight Tag to your site. Without it, website-visit intent alerts won't fire.[2]

3. ### Triage the feed once a day

   Open the Alerts feed each morning. Click the bookmark icon on anything worth acting on — bookmarked alerts collect under the Bookmark tab so nothing gets lost.[2]

> Keep it simple: Treat the Alerts feed as your to-do list, not your inbox. Bookmark the 2–3 signals that matter, log the action in HubSpot, move on.

SECTION 03

Find New Accounts

Use Account Search (the company-level search) to build a target list that looks like your best customers. Combine two or three strong filters — not eight weak ones.[3]

1. ## Define your ideal account in plain terms

Write down industry, employee size, region, and growth stage of your best current customers. That's your filter recipe.[4]

2. ## Run an Account Search with high-signal filters

- Headcount growth — companies growing 20%+ are almost always spending and evaluating vendors.
- Recent funding — new money means new budget.
- Industry + company headcount + region — your core ICP shape.
- Technologies used — narrow to companies already running tools that pair with what you sell.

These account filters (headcount growth rate, tech stack, and buyer intent) are where the real buying signals live.[4]

3. ## Save the search + save the accounts

Click Save search so Sales Navigator re-runs it and alerts you to new matching companies automatically.[3] Then save the best accounts into your Key Accounts list so they start syncing to HubSpot.

> Keep it simple: Save the search once and let it feed you. A saved account search is a standing pipeline that refreshes itself — no re-typing filters every week.

SECTION 04

Find New People

Use Lead Search (the people-level search) to find the right humans inside your target accounts. Sales Navigator offers 40+ filters across role, company, and activity — layering account filters, lead filters, and Spotlights is where it compounds.[3]

1

Anchor the search to your accounts

Start a Lead Search and apply the Account Lists filter set to your Key Accounts. Now you're only seeing people inside companies you already care about.[5]

2

Filter to the right roles

Add Function, Seniority, and Job title to reach decision makers and influencers. Use Boolean in the title field — e.g. VP (Marketing OR Sales) — to widen or tighten precisely.[3]

3

Layer Spotlights for timing

- Changed jobs in the last 90 days — new leaders reset vendor decisions.
- Posted on LinkedIn recently — active people reply more.
- Following your company / viewed your profile — warm before you even reach out.

Spotlight filters surface these timely signals right in the results list.[3]

4

Save leads → they sync to HubSpot

Save the right people as leads into a list. With CRM Sync, saved leads match to HubSpot contacts and their activity/alerts surface on the record.[1]

> Keep it simple: Two or three high-signal filters beat a stack of weak ones. Anchor to your accounts, pick the role, add one timing Spotlight — done.

SECTION 05

See What Technologies They Use

Knowing an account's tech stack tells you whether they're a fit, what you integrate or replace, and how to open the conversation. Sales Navigator surfaces this in two places.

1. ### Filter by “Technologies used” in Account Search
   In Account Search, the technologies used filter lets you find companies already running specific tools — so you can target accounts that pair naturally with what you offer.[4]

2. ### Read Account IQ on the account page
   Open any saved account and check Account IQ — Sales Navigator's AI summary that compresses company research (including stack and priorities signals) into a quick read, so you skip hours of manual digging.[6]

3. ### Log the stack in HubSpot
   Drop the key technologies into a HubSpot company property or note. Now your whole team sees the stack on the record, and you can segment future outreach by it.

> Keep it simple: Let technology be a filter, not a research project. Search for the stack you want, confirm with Account IQ, log it once in HubSpot.

SECTION 06

Upload Your HubSpot Accounts to LinkedIn

Instead of saving accounts one at a time, export your target companies from HubSpot and bulk-upload them into a Sales Navigator account list as a CSV. Sales Navigator matches each row to a LinkedIn company and drops the matches straight into your list.[7]

1

Export the accounts from HubSpot

In HubSpot go to Companies, filter to the accounts you want, then Export as CSV. Include company name and website at minimum — those are the fields LinkedIn matches on.

2

Fit your data to the template

Use the included account upload template (attached as a separate CSV). Fill in one company per row. Company Name and Website are the key match fields; the rest help you organize and are optional.

Column	What goes here	Needed?
Company Name	Legal or common company name.	Required
Website	Company domain — the strongest match signal.	Strongly rec.
LinkedIn Company URL	Direct link if you have it — best match.	Optional
Industry / City / State / Country	Helps disambiguate similar names.	Optional
Employee Count	Extra signal for matching.	Optional
Account Owner / CRM Account ID / Notes	Your reference back to HubSpot.	Optional

3

Upload into your account list

In Sales Navigator, click Accounts in the top menu, pick your list from the dropdown, then click Upload accounts (upper-right). Review the requirements, click Continue, then drag in your CSV.[7]

4

Map columns and finish

Map your CSV headers to the LinkedIn account fields, then click Finish. LinkedIn recommends starting from its own downloadable template inside that flow so every mandatory header is present.[7]

5

Check the match report

Matched companies (Match Confidence 1–5) land in your list automatically. Anything scored 0 didn't match — open the match report, add a website or LinkedIn URL, and re-upload just those rows.[7]

> Keep it simple: Always start from LinkedIn's in-app template so the mandatory headers are exact. Fill Website for every row — it's what drives a clean match.

SECTION 07

Import Contacts from LinkedIn to HubSpot

There are two clean ways to get LinkedIn people into HubSpot as contacts. Pick based on whether you have the paid integration.

Option A — Sales Navigator “Add to CRM” (fastest, no spreadsheet)

With the Sales Navigator + HubSpot integration connected, you can push a lead straight from LinkedIn into HubSpot — name, title, and company come across, and a contact/company record is created or updated. No CSV, no copy-paste.[8] This requires a HubSpot Sales Pro or Enterprise seat on top of Sales Navigator.[8]

1

Find the lead in Sales Navigator

Run your lead search and open the person (or select several with the checkboxes).

2

Click “Save to CRM” / “Add to CRM”

Use the CRM button on the lead to send it to HubSpot. Choose whether to create new records or update existing ones, then confirm.[8]

3

Segment in HubSpot

Build a HubSpot list from the imported contacts so you can enroll them in sequences and workflows without manual entry.[8]

Option B — CSV export/import (works on any plan)

No integration? Export your LinkedIn connections and import them into HubSpot as a CSV — no apps or licenses needed.[9]

1

Export your LinkedIn connections

On LinkedIn, go to Me → Settings & Privacy → Data Privacy → Get a copy of your data. Select Connections, click Request archive, and grab the CSV from your email when it arrives.[9]

2

Start the import in HubSpot

In HubSpot go to Contacts → Import → Start an import → Import from file. To also create linked companies, select both Contacts and Companies.[10]

3

Upload, map, and finish

Upload the LinkedIn CSV, map each column to a HubSpot property (First Name, Last Name, Company, Email, etc.), choose create-new vs. update-existing, then finish the import.[10]

> Keep it simple: Use Option A when the integration is live — it keeps records clean and avoids duplicates. Use Option B for a one-time bulk load of your existing connections.

QUICK REFERENCE

Your Simple Weekly Rhythm

Daily (5 min)	Scan the Alerts feed. Bookmark 2–3 signals worth acting on. Log actions in HubSpot.
Weekly (20 min)	Run your saved account + lead searches. Save new matches to your lists.
Monthly (30 min)	Review Key Accounts: prune dead ones, add new ones, confirm HubSpot sync is clean.

Sources

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