

Sales Nav Audit Checklist

A 14-point self-audit for buyers who already pay for Sales Navigator.

Persona P3-Sales - Pain rows 4.2 + 18.1-18.5 - Expected CR 6 % page-view to email

Most Sales Navigator seats run at under thirty per cent of feature utilisation. The fourteen checks below take ninety minutes once a quarter and surface the dead spend that an unattended seat accumulates.

1. Saved-search hygiene

Open every saved search older than ninety days. Re-run it. Compare the count today to the count when it was created.

A drift of more than fifty per cent in either direction is a sign that the underlying market shifted, the persona definition is stale, or LinkedIn changed how that filter behaves. Either rewrite the filter or archive the search.

Healthy seats carry between five and twelve saved searches. More than twenty is a signal that no one is responsible for retiring stale work.

2. Account-list refresh cadence

Account lists should be refreshed against your ICP at least monthly. Look at the last-modified-date column.

If the most-recent list is older than sixty days, the seat is being used for one-off lookups rather than as a target-account engine. The ROI calculation collapses if account lists are not actively refreshed.

3. InMail credit utilisation

Pull last quarter InMail credit consumption. Divide credits used by credits granted. Healthy seats sit between 70 and 95 per cent - too low signals an under-used seat; too high suggests credits are not being recovered on read receipts.

Track InMail acceptance rate. Below 15 per cent is a copy problem. Above 35 per cent is unusual and worth studying.

4. Lead-list size discipline

A lead list above 2,500 entries is operationally unmanageable. The TTPA cadence caps lead-lists at 1,500 in the most engaged tier and at 800 in lighter tiers.

Audit each list older than thirty days; archive what is not actively touched.

5. Spotlight filter usage

Spotlight filters (Posted on LinkedIn / Changed Jobs / Viewed Profile / Mentioned)

are the single highest-yield Sales Navigator surface. If they are unused, the seat is paying for the cheap features and ignoring the expensive ones.

A monthly cadence of one spotlight-led search per active campaign is the minimum signal of a seat earning its keep.

6. CRM sync state

Verify the Sales Navigator-to-CRM sync is alive. Check whether the last sync timestamp on the CRM side is within the last 48 hours.

Stale syncs hide the most valuable telemetry: when the prospect changes role, the CRM does not know, and the next outbound email lands at a defunct address.

7. Activity-vs-saved-leads ratio

For each saved lead, record the last activity timestamp. A ratio of fewer than 1 in 4 leads touched in the last quarter is a sign the seat is functioning as a phonebook rather than as a prospecting tool.

8. The remaining seven checks

Check 8: Boolean-search literacy of the operator. Check 9: Account-mapped-to-buying-committee depth. Check 10: TeamLink usage on warm-intro paths.

Check 11: Buyer-intent signals consumed (relevant on Advanced Plus seats). Check 12: Tagging discipline. Check 13: Notes hygiene. Check 14: Quarterly written audit by the ops owner.

Each check is binary: pass or remediate. The point of the audit is to surface the bottom three remediations and assign them to a named owner with a fortnight to close.

Next step.

Book a 30-min Sales-Nav consult

<https://ttpa.example.test/book/>