Focused Social Selling

"less really is more"

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ADAPTIVE Business Services

Preface by

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Maximize Social Business

TABLE OF CONTENTS

PREFACE BY NEAL SCHAFFER,
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Social Selling continues to be the center of conversation in the social media and sales blogosphere, but for many traditional B2B sales organizations, a majority of salespeople are still "in the dark" and doing their sales like they always have as if social media simply didn't exist.

On the other hand, I just returned from a business trip to Japan and had an epiphany moment. Although social selling is not in the vocabulary of Japanese salespeople, a majority of them are well ahead of their American counterparts in the art of social selling for one important reason: They proactively connect with potential clients and current customers on Facebook.

I've trained many an organization on social selling, including many where there is a resistance by salespeople to use social media for work reasons, but if you think about what the average Japanese salesperson does, it makes a tremendous amount of sense. By becoming friends with clients on Facebook, they are able to:

- Appear in prime online real estate, Facebook notifications, whenever they engage with their client's content.
- Make sure their messages get seen through sending them through Facebook Messenger
- Always understanding what their clients are up to on a daily basis by looking through their profile updates

Obviously there is much more to social selling than simply becoming friends on Facebook, but once salespeople learn to use social media as another tool to help them prospect, close deals, and keep in better touch with clients, it opens up a world of opportunity for them to master and become more effective in sales in this social media age we live in. In fact the statistics on the benefits of social selling and the paradigm shift of today's B2B buyer should be convincing to any sales manager that, sooner or later, change will be needed to adapt:

- 78% of salespeople using social media perform better than their peers (Forbes)
- 62% of salespeople who do not use inbound social selling miss their quotas while 64% of sales teams that use inbound social selling reach their quotas (Aberdeen Group)
- 98 out of 100 sales reps who have at least 5,000 LinkedIn contacts reach or surpass their sales quotas (The Sales Benchmark Index)
- 77% of B2B purchasers said that they would not even speak to a salesperson until they had done their research (Corporate Executive Board)

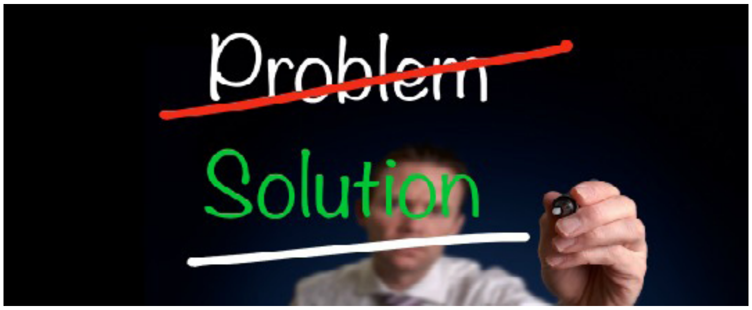
This ebook by longtime friend and Social Selling expert Craig Jamieson serves as a much-needed guidebook for the beginner social seller or advanced social selling sales manager to become better focused on their systematic approach to social selling. There are no shortcuts to building a robust social selling program, which is why Craig handholds you through all of the processes your organization will need to master to take advantage of the benefits of social selling.

Like social media marketing, social selling becomes muscle memory to those organizations that have created a robust program and have implemented social selling training for all of their salespeople. Perhaps your organization already has social sellers without your realizing it. I sincerely hope you will use this ebook as either a starting point or revision opportunity for your organization to start doing social selling the right way or further improve upon your efforts.

On a final note, sales managers and salespeople should not be afraid of social selling once they realize, as Craig correctly points out, that, "The simple fact is that social selling augments, rather than replaces, our traditional selling methodologies." Reading this ebook is your best bet to both become educated and get over any fear of social media you might have...

I wish you the best of luck in your social selling and hope to hear of your successes after utilizing the advice in this ebook!

CHAPTER 1: UNDERSTANDING THE SOCIAL SELLING PROBLEM



There is a problem with social selling. Actually, there are a lot of problems. Some are based on misconceptions and flawed expectations of what social selling will and will not do and I have contributed to this confusion as have many others. In our zeal to embrace and share the good news about these fabulous new tools, we may have neglected to emphasize that … you still need to know how to sell.

The simple fact is that social selling augments, rather than replaces, our traditional selling methodologies. Therefore, any valid and meaningful discussion of social selling must address the necessary marriage between the two. If we can't or won't do that, chaos will inevitably ensue and very few sales have ever been realized in this type of atmosphere. Social media has created problems, and opportunities, for both salespeople and for our customers. Let's begin with the latter.

While buyers today, with the advent of the internet and a simple Google search, are more informed than they have ever been before, they are also becoming increasingly more inundated with our media messages. Their inboxes overflow with our email offers and newsletters. Their phones are constantly ringing with our incoming calls and their cell phones beep with our text messages. If that were not bad enough, they are being constantly engaged (maybe even stalked) by you and me on their social networks. It is little wonder that they retreat to their castles behind their wide moats.

How do I know all of this to be true? It's simple. While I like to think of myself as being the hunter, others look at me as being their prey. In other words, to other salespeople, I look a lot like barbecue. My inbox and social messages are overflowing hence, my customers are seeing the same.

Salespeople are also being inundated as they desperately try to understand, and perhaps implement, social selling tools and strategies into their own selling practices. If you have “shiny bauble syndrome”, the need to look at everything new in hopes of finding the BBD (bigger better deal), … you’ve got troubles. The offerings, many of them good, become a convoluted mess resulting in either paralysis or failed initiatives.

As salespeople, this means that we can’t focus and eventually we do, or we will, shut down. We attempt to process too much. Too much data and … too many customers. We have been sold on the need to expand our connections (extend our reach) while giving little to no thought on who we actually need to connect to. Once we connect, it is on to the next before even attempting to develop any type of relationship or to discover common ground with those who we have just secured. When you think about it, it really is madness. We have become hamsters on a wheel that leads to … nowhere.

I can’t speak for you but, I simply cannot build relationships with the 9,000 or so social connections that I currently have. If the 80/20 rule is true, only 1,800 have the potential of doing business with me and 360 of those would be the contributors to 80% of my income. I need to determine who those 360 are and keep the other 8,640 in reserve.

Think of your 360 (your number may be different) as being the elite of professional athletes. The other 8,640 may be added to your team on draft day or when your older players are “retiring” (no longer buying or providing value through some other means such as referrals).

Many of our customers will naturally follow an ebb and flow of moving up or down in value. Mind you, if their value is going down, I would be looking in the mirror as the first place in my quest for reasons.

The really great news is that, via social selling, we do have access to all of these potential “A” players (even those not presently identified) and we have the tools available to assist us in our search. We can nurture future all-stars while continuing to ensure that the needs of our current starting lineup are being met.

I believe that there is a solution …

- We must systemize our approach, our strategy, our tactics, and integrate social selling with our proven traditional tactics.
- We must fully understand what our best customers and prospects look like and then we must cull the herd to only focus on these select few.
- We can only gain the attention of our customers and our potential customers if we personalize our engagement to meet their needs and we do so with consistency.

This is a B2B outbound selling solution and not a marketing one (other than the fact that social has blurred the lines between marketing and sales). Still, your needs may be completely different. Your system may be delivering measurable results beyond your wildest expectations. Excellent and congratulations! However, if that is not the case and you find yourself open to some new ideas, please read on. This really is a simple system. It is predicated on the formula …

Fewer & Better Accounts + Consistent Personalized Progressive Touches = Sales

CHAPTER 2: PRE-PLANNING

Before we get started, there are some questions to be answered and I can't do that for you. I must warn you. There are tough choices to be made.

What and where do you want to sell?

These are critical areas that will be instrumental in developing your buyer persona and this will be one of the first steps in our system. An important piece of this exercise is that, particularly if you wish to work within a specific geographical area, who do you think will become your target buyers? Where will you be marketing your services? Why are you talking with people in China unless, of course, that is your market?

This system does include space for your influencers regardless of where they live. These might be people who you like and respect. They are perhaps your mentors. Influencers and colleagues from similar non-competing industries also have the potential to refer you to buyers who will directly meet your target persona.

What are you going to give up?

You may find yourself spending an inordinate time on busy work. I read too much, research too much, test new products too much, and I share too much. While all are important activities, none of these excesses have placed excess dollars in my pocket so I do this … why? If this sounds like you, I would suggest that you might curb these activities and redirect your efforts from quantity to quality. I would also decide what activities need to be conducted during selling hours (when you can and should be engaging with customers) and what can be done during non-selling hours.

If your customers are not found on Facebook or Pinterest or Google+ … why are you even spending your time there? However, if some of your targeted customers are there and you are not, you will need to revisit your participation but, only to the extent that it applies to your select customer group.

What are your ultimate goals?

You will need to set goals, establish benchmarks, and define your metrics. Goals should include timelines for completion. Your metrics might be to increase revenues from new and existing accounts along with customer retention percentages. You might also want to increase margins and penetrations in specific lines. Particularly if you are just getting started, you might have goals in terms of increasing your targeted connections.

How are you going to approach it?

Your approach will be defined in the actual steps that we will cover in future chapters but, your activities will likely break down into six key areas ...

1. Social activities - Social media does not have to be a time-sucking black hole in order to be effective. The fact is, in less than 30 minutes per day of quality focused effort, you can be highly effective!

2. Providing content - If you are not creating content now, you need to be. Great types of content include blogging, videos, slide shows, infographics, and podcasts. You can create EBooks or white papers that might be used as free downloads in exchange for somebody signing up for your mailing list and your newsletter. All of these content ideas serve the important functions of educating your client base as well as attracting potential customers to your services.

3. Progressive engagement - I read an article recently that pointed out that Twitter was exceeding LinkedIn as a profitable tool for discovering new opportunities. The conversation was started ... which is better? Someone replied ... "Twitter and LinkedIn." Brilliant and correct! It's easy to engage on Twitter and then move somebody to LinkedIn. I see it being used every day on ... me.

4. Connecting with your target market - Once your target buyer persona is defined, this becomes pretty simple. When you have a clear target, hitting it should be little problem.

5. Building relationships - We will be looking at client social profiles and monitoring their conversations in order to really get to know our customers. That might sound creepy but, it is absolutely no different than what salespeople have been doing with their eyes and ears since time began.

It's not what you know, it's how you deploy it. If you have no social skills in real-life, I suggest that you run away from social selling as fast as you can.

6. Converting connections to paying customers - You need to move people from your website, your profiles, and your activities and into your revenue stream. This includes effective calls-to-action along with good old-fashioned conversation.

Gather contact info

One of the most important questions that you have to answer is how will you, can you, gather and parse the most important info on each contact and then store that for easy access? Let's take a look at just a few of the bits and pieces of info that, at the very least, we should wish to collect …

- Pertinent contact info (name, company, phone, email, etc.)
- Notes (meetings, discussions, information)
- A record of your engagements including exchanged communications (emails, texts, social)
- Touch and tap reminders including recurring reminders (tasks)
- Company website and social presences
- Social profiles (distilled critical social information)
- Likes, dislikes, mutual interests, mutual connections, pain points, and commonalities
- Events (calendar)
- Opportunities and the next steps to be taken toward securing business
- A way to tag and organize your connections

While you will be visiting their appropriate social profiles to gather much of this information, just as much will be revealed during real-life engagements such as actually meeting or talking on the phone.

Create touches and taps

You will also need to determine what your arsenal of weapons of engagement might be and when and how will you deploy them. I would define taps as quick engagements that are meant to just let people know that you are there and that you are thinking of them. Examples would be …

- Likes (on any of the social networks)

- Retweets on Twitter, +1's on Google+, favoriting, or sharing forward on other networks
- Endorsements on LinkedIn

Touches, on the other hand, are more personal in nature and something that promotes direct engagement. Examples for these would include ...

- Commenting
- Messages (public or private)
- LinkedIn Recommendations
- Things like retweets that include a personalized message
- Email them an article that they will find of interest
- Bring a person or an opportunity to their attention and facilitate an introduction
- Promoting them, their company, and their content (be sure to mention them in the update!)

Now, take these social engagements and combine them with your traditional tactics ...

- Lunch, breakfast, dinner, coffee, or a tasty adult beverage
- Taking them to an event
- Gift cards. certificates or ... donuts
- Handwritten, including thank you, notes
- Phone, email, text or video chat
- Personal visits

As you can easily see, there is absolutely no reason why you should ever have the feeling like you are struggling for some unique way to keep in touch! How often (as a minimum) that we tap or touch someone will be governed by which classification we have assigned to them.

Define engagement procedures

Engagements must be personalized, targeted, and progressive. One of the things that you have to think about is where (which social networks) are these engagements available to us and that we do want to act appropriately on each platform. I would find an unsolicited request to friend me on Facebook from someone who I do not know, to be inappropriate. A template invitation from that same person on LinkedIn, maybe not so much but, no less ineffective. A personalized invitation with an introduction and a reason for me to connect ... that is quite different!

If you were to discover that a company was downsizing and that is a trigger for an opportunity for your services, would you say ...

- "*I saw on Facebook that you are downsizing and I would like to talk to you about that*" or ...
- Would you take this info and use a statement like ... "*Many companies today are wrestling with staff levels. I don't know if you would be one of them but, if you are, we help companies like yours with that process. Would that be something worth meeting to discuss?*"

Like night and day. Follow the kindergarten rules for stepping into any conversation. Do you have something to contribute and when is the right time to do so? Never ask for anything until you have earned that right by building that relationship first.

You might start with a casual conversation on Twitter, follow up with a request to connect on LinkedIn after first asking if that would be o.k. via a Twitter DM, connect and engage on LinkedIn, follow up with an email, then a phone call, and finish up with a video chat or ... an in-person meeting. This same type of progressive engagement can be done in social network groups.

Ultimately, your engagement goal, and process, is absolutely no different than it would be in real-life and, guess what? This is real-life and we want to move our relationships to this location! The foundation of any business is relationships and the goal of your engagements is to build those relationships that put you in the place of asking for business when appropriate or capitalizing on those opportunities when they present themselves. It really is that simple. If you have not built any kind of a relationship with a potential customer, and you uncover an opportunity, are your chances better or worse than if you have previously established a relationship?

Classifications & touch reminders

The A, B, C classification system has been around forever because ... it works! Your best customers are your "A" customers, "B" are second best, and "C" are probably too early to tell. There is also "D" and that stands for "Delete". Each has a schedule for recurring touches. You will need to be able to classify each of your contacts and then establish that touch schedule. Of your total number of accounts, "A" might be 15%, "B" 30%, and "C" 55%.

This mix might also be determined by your choice of recurring schedules. Examples of touch schedules might be "A" = weekly, "B" = monthly, and "C" = quarterly.

If you decide that "A" accounts need to be touched weekly, how many of those quality touches can you make in a week? 15% of 360 is 54 people. Can you make an average of 11 quality touches per day? You will need to decide this for yourself based on your specific business. Mind you, these are minimum touch schedules and are by no means indicative of the actual touches you will, or should, be making.

Who are your "A" accounts? Certainly your best recurring customers qualify for this status but, I would encourage you to think beyond who presently spends the most money with you directly. This might include heavily coveted target accounts as well as those who consistently refer business to you. Your "B" accounts likely buy from you but, not with the consistency and at the level that you would like. Still, they do have the potential to move up. "C" accounts, and expect a lot of churn in this classification, are new and interesting opportunities that must be qualified. They will either move up or out and, if out, they will be replaced by new "C" accounts.

Your buyer persona, something that we develop later, will further help you to make these decisions regarding both your selected accounts as well as their classification. Do not be surprised to find out, following a close examination, that some of what you feel are your best accounts, might not actually be so.

While it would be very simple to look at sales to accounts over the past 6 months and choose your top accounts from there, I don't much care about what they have spent with me. I want to know how much they will spend with me. This is sometimes referred to at LTCV (life-time client value).

How will I track activities and results?

I don't know about you but, I don't want to keep all of this on post-it notes even if they are in manila folders! I think that you are going to need some sort of a CRM (Customer Relationship Management) program.

At the minimum, your system (CRM or Social CRM) will need to include the following …

- Contact and company records with pertinent information including notes
- A task and reminders feature including recurring reminders
- Fields for social profile and website URLs
- A record of exchanged communications

- A tagging system or another way to organize your contact records
- Search and advanced search of records
- Opportunity tracking

Beware of "App Creep"!

You will be enticed to use other tools to assist you in selling. There are a ton of sales-specific programs to choose from but, be cautious. *App creep* is a lot like a hamburger. Ask for a burger and the waiter replies ... "*Add cheese? Two patties? Bacon? Fries? Supersize?*" "*Yes, yes, yes, yes, and ohhh yes!*"

How can we evaluate, let alone use, them all? The simple answer is that we can't. I believe that minimal tools, worked consistently, is the better solution. This system embraces and leverages this philosophy.

Schedule daily, weekly, and monthly routines

This program requires consistent interaction and regular re-evaluations. You simply must have a plan and be prepared to stick to it! Practice becomes permanent and soon it will become reflex. You will be able to work it in a time-effective manner due to the fact that your focus will be directed toward a select group of target accounts.

CHAPTER 3: GET YOUR SOCIAL HOUSES IN ORDER

If you are going to use social networking as a part of your sales efforts, you had better get your social houses in order first. Social media is a two-edged sword. If you are good at what you do, social makes you better. If you suck at what you do, social will also amplify that to the rest of the world. This, combined with the old adage that "you get only one chance to make a good first impression", makes it imperative to ensure that everything is looking good before you venture out.

This means that your profiles and pages on the social networks that you will be frequenting must be accurate and complete. When somebody requests to connect with me on a service, or if I am considering extending a request to connect, the absolute first thing I do is to take a close look at their social presence including their company pages. Particularly, if I don't know this person or don't know them very well, what I find may be the most important determining factor as to whether we will connect or not.

Belonging to some good industry related groups is also a huge plus on a number of different levels. You are increasing your chances of connecting with some really great people and those people will have a better chance of getting to know you.

You will want to direct people to your website. How does it look? Is it easy to navigate? Do you have a maintained and updated blog? Does your site make it easy for others to contact you including connectors to your social pages and profiles? Assuming you have a blog, are those articles configured to be easily shared via social sharing buttons?

Blogging is a great way to demonstrate your expertise, create valuable educational content, and to attract others to you and to you and to your website. If you your company does not have a blog and you want those same benefits, all hope is not lost! Use LinkedIn Publisher. LinkedIn happens to be my business hot-spot so, whenever I publish on LinkedIn, I am doing so directly to my target audience.

Your brand messaging is just as important! Early on, I shared and wrote about a lot of different things relating to social business. A few years ago I signed up for a brand messaging assessment that matched my sharing against my identified area of specialty which is selling. Of the six areas that the assessment graded, I got five "F's" and one "D". Wake up call! I immediately adjusted my focus to my area of expertise (my brand) and the results were nothing short of amazing!

Understand each social network

Each network has their pros and cons but, always remember ... where are your customers?? If your customers are not there, why are you? Conversely, if your customers are there, why aren't you?

It is also important to be aware of the rules of engagement on each. Now, you can say almost anything on Twitter. Facebook is very personal and any talk of business should be kept to an absolute minimum. B2C tends to play better with Facebook than does B2B. LinkedIn is "business" so baby pictures that work well on Facebook, or even on Twitter, do not belong there. If you can remember this one paragraph, you will excel!

While each network may have their individual strengths, when combined strategically, they can be very effective!

CHAPTER 4: CREATE YOUR BUYER PERSONA

Soon you will be encouraged to cull your contact database in order to a select few hundred of these folks. You will then be able to focus your efforts on these people in order to create and develop the kind of relationships that will lead to continuous repeat and referral business.

You will first need to create a buyer (or target) persona in order to determine who you want to sell to and what these people look like. How will you choose these select few? You must define your criteria.

After selecting your criteria, I would suggest for you to utilize a scoring system that assigns a point value for each match. In fact, I would also say that certain criteria should carry a higher point weight than others.

Start with a sampling of your best customers

We seek to replicate proven success, therefore, think of your best customers. What makes them that? What might they have in common? Can we clone them? Our goal is to discover who has the best chance of actually doing business with me or referring business to me or who do I want to learn from? Who do I want to work with and who am I capable of handling?

Next, interview these customers in order to discover why they buy from you and your company. The list below will assist you in this discovery and should be applied to both your existing and potential clients. This list is by no means all encompassing. Please feel free to add your own criteria as you see fit.

Develop your buyer persona

As you are developing your persona, think about the five types of “customers” who I feel should be included in your list …

1. Existing customers who have the potential to keep on buying and, in fact, purchase at a higher level.
2. Former customers who you would still want and where you have a chance of bringing them back into the fold. Statistics show that ⅔ of these customers probably left because they felt ignored.
3. Exciting potential prospects.
4. People who will refer you to other business.
5. Influencers (mentors and educators) who assist you in other ways.

Next assess, and really consider, the value of each of these segments. If one or more of these areas is not important to you … discard them. Remember, you are attempting to map your ideal customer and your ideal opportunity!

- **Location** - Do you wish to provide your products or services locally, regionally, nationally, or internationally? Where will you not go?

- **Previous engagements and relationships** are a huge plus providing that they have been positive.

- **Influence and reputation** - A high level of influence will be beneficial providing that this person is willing to share their knowledge, and their connections, with you. Think *introductions* and *referrals*.

- **Type of business** - Your product or service may be industry specific. If it is not, what industries best match your buyer profiles? Your services may fit better in a B2B environment rather that B2C or … you might reverse that order.

- **Company size** - Size can be defined by: employees, revenues, locations, and many other factors. What sized company is most likely to invest in your services?

- **Titles** - My ideal candidates, based on company size, will have one of the following titles: Sales Manager or Sales Director or V.P. Sales or President or Owner or G.M..

- **Business potential** - If this is an existing customer, this is not necessarily what they have spent in the past but rather what they will be will to invest going forward. You will need to gauge this potential for your prospective customers.

- **A willingness to refer** - Your existing customers should be your best source for referrals. Are they? If not … why? Have you ever even asked them for referrals? Good referrals are like sales gold but, if you think for one minute that your customers spend any time at all thinking about sending you referrals, particularly when you are not visible … wake up! This is just one more reason why consistent touches are so important! Don't forget about your influencers and collaborators. How about power partners? Power partners are non-competing business who call upon your same target personnel. This can be a win-win for both of you!

- **Keywords in their social profiles** - Can you identify and discover commonalities that fit your persona? Start with your existing customer sampling.

- **Their specific areas of need that you are able to satisfy** - No pain = no sale. No need = no sale.

- **Existing status with a competitor** - Will you be able to unhook that relationship? What value can you offer that would entice a switch? Are their chinks in their armor?

You will also likely want to mark certain criteria as being non-negotiables. These are the areas that will kill any opportunity regardless of what everything else tells you and … you are going to have to be ruthless in enforcing this. Greed will likely rear its ugly head and you will lust after that which you have little chance of securing or that which you will wish that you had not secured. Either way, time and effort will have been wasted.

A tighter set of qualifications can only lead to increased success. If your final list is embarrassingly small, this only means that you need to go out and find new, and better, prospects. I have spoken with many businesses who lament that "I don't like my customers." What they are actually stating is that their current customer base is not delivering recurring quality business. We will look to correct this but, you can start by looking in the mirror.

Now, what will you do if you have a good but, not perfect, match? For example, you set 90 points as your minimum and they have 85? I think that the answer to this is … it depends. We all have to make judgment calls like this every day. By the end of your implementation of this task, you will be in a better position to make those determinations.

CHAPTER 5: CULLING YOUR SOCIAL NETWORK

Now the real work begins and it starts with culling your social network(s) down to a manageable size. It is critical that you identify and start with your social honey-pot and here is why ...

As I was thinking about this process, and looking at the sheer numbers of connections on my social networks, particularly with Twitter, this at first appeared to be a hopeless task. How could I possibly pare 7,500+ Twitter followers down to 360 or so connections? Then it struck me. I could easily reduce LinkedIn (my honey-pot) down to this number and then discover the Twitter, Facebook, and Google+ profiles for those folks only.

Considerations

Before we get started, we should take a look ahead ...

- While my focus is on LinkedIn, I will reserve space for folks found on the other networks who might meet my buyer persona. The same can be said for folks who do not do social networking at all.

- Your initial list will be just that ... your initial list. You will likely have to repeat this process several times in order to arrive at a final working point.

Start your search!

Since LinkedIn is where my customers are found, I will start there and identify and connect (as needed and at the appropriate time) with up to 360 people that meet my specific buyer persona.

You will need to use LinkedIn advanced search to start to whittle down your connections. I would try to use search first based on your non-negotiables and then look at each profile separately that meets those criteria.

For efficiency. try to make your searches as discriminating as is possible. Remember too that you are able to save up to three searches with any LinkedIn account, that you can call up at any time, and LinkedIn will monitor your network's activities and will alert you of any new members (or members who have changed their details) who now meet your search criteria.

Start with your own connections, then groups, then shared 2nd degree connections, and finally 3rd degree and others. People with a shared connection and who you share a group with get bonus points since somebody can probably introduce you (extra bonus if you share this connection with more than one person as you are increasing your odds for a good introduction) and for groups since you can introduce yourself and with whom you already have something in common.

Your initial list will be composed of people that you are already connected to as well as people that you want to connect with. If this is a potential new connection, who do you know that can introduce you?

Progress check

Now, how many are on your list? Are you over or under your desired number? If you are sitting above your number, it's time for round two of the selection process. If under, you will need to expand your search. You will naturally attract new connections based on your activities but, ideally they are going to be targeted connections. Like everybody else, **these will be used to improve the stock of the herd. Keep to your best 360**. You only have so many acres on which to graze. This does not mean that you cannot have more than 360 connections. It does mean that you will focus on those 360 only.

CHAPTER 6: OPTIMIZING YOUR CONTACT RECORDS

You should now be in a position to assign an A, B, C classification (based on your buyer persona and point system), along with the recurring touch schedule, to each of your 360 contacts. Let's get started!

Away we go!

This is going to be tedious but, this is also not a race. You only have to do this one time so please take the time to do it right! You have your 360 contacts that you gleaned from search and other methodologies so maybe you do 15 a day and spend 10 minutes on each. Take this group and apply each one's qualifications against your buyer persona in order to determine their A, B, C classification.

You should have also imported your email contact lists (or a selected subset) to LinkedIn. LinkedIn will allow you to manage these contacts from within your connections list and this includes your contacts even if you are not connected to them and even if they are not on LinkedIn.

While in LinkedIn, review their profiles and take notes while paying special attention to things that you may have in common. As you are doing this, you will be assigning tags. Tag each as customer, suspect, prospect, or colleague (or influencer, whatever you like) and then assign an additional tag for their A, B, C classification. Finally, set their recurring reminders based on their classification. All of this can all be done directly within their LinkedIn profile under "Relationship".

Make sure that each person is added to your CRM with their appropriate tags, initial notes, and recurring reminders (yes, we are creating a backup system and we are also positioning ourselves for potential future LinkedIn service offerings).

If you are thinking that you can export your LinkedIn records and then import those to your CRM, be aware that when you export LinkedIn contacts, you don't get to export tags, notes, or reminders on those records and you will be exporting all of your 1st degree connections and only your 1st degree connections. You will, however, export email addresses.

Flushing out contact profiles

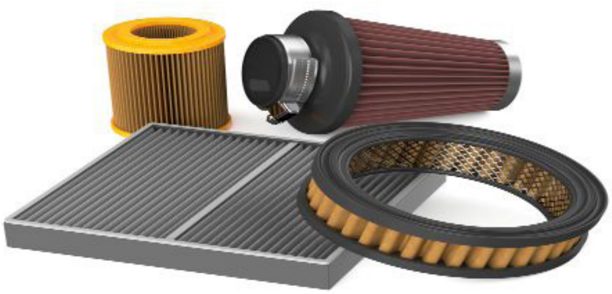
Start with discovering the additional social profiles (Twitter, Facebook, Google+, or other) for your identified 360 (those matching your buyer persona) only.

One thing that many people will either forget or neglect is that a simple Google search for a person's name (add a location if known), will yield most, if not all, of that individual's social profiles. Finally, you will want to ensure that these social profiles are connected to the appropriate CRM contact record.

What if they are not on LinkedIn or if you are not even sure if they are accessible on social? You can look at the Falcon.io or Discoverly chrome extensions which, incidentally, you can also run in line with LinkedIn's own Rapportive. These are primarily Gmail/Google Apps and/or Chrome apps.

CHAPTER 7: FILTER YOUR SOCIAL NEWS FEEDS

Optimize your news feeds



Being able to filter your news feeds is a critical key element of this program. You simply must have the ability to cut out the noise (updates from people who do not fit your buyer persona) so that you will be able to focus on those who do!

Create your lists

We will be closely monitoring the social updates from our 360 and each network has its own ways, and in some cases limitations, for doing so. One nice thing about most major social networks is that people can be on more than one list (circles in Google+). This means that you could have one list for your entire 360 and then separate lists that might show those of your 360 that are customers or prospects or suspects or influencers or referrers. This same rule generally holds true for tagging contacts in your CRM. In my CRM I can call up contacts who are tagged as being both "A" classified as well as "Customers" or any combination of tags and field values.

LinkedIn - LinkedIn is the exception when it comes to lists. It has … nothing. There is simply no easy way to filter updates in your LinkedIn news feed. So, with LinkedIn, we are presented with one of three choices:

1. Disconnect from everybody who is not on your list or you can …
2. You can visit each applicable person's profile regularly in order to review their recent updates (I would suggest weekly) or you can …
3. Hide all updates from those people who are not a part of your list

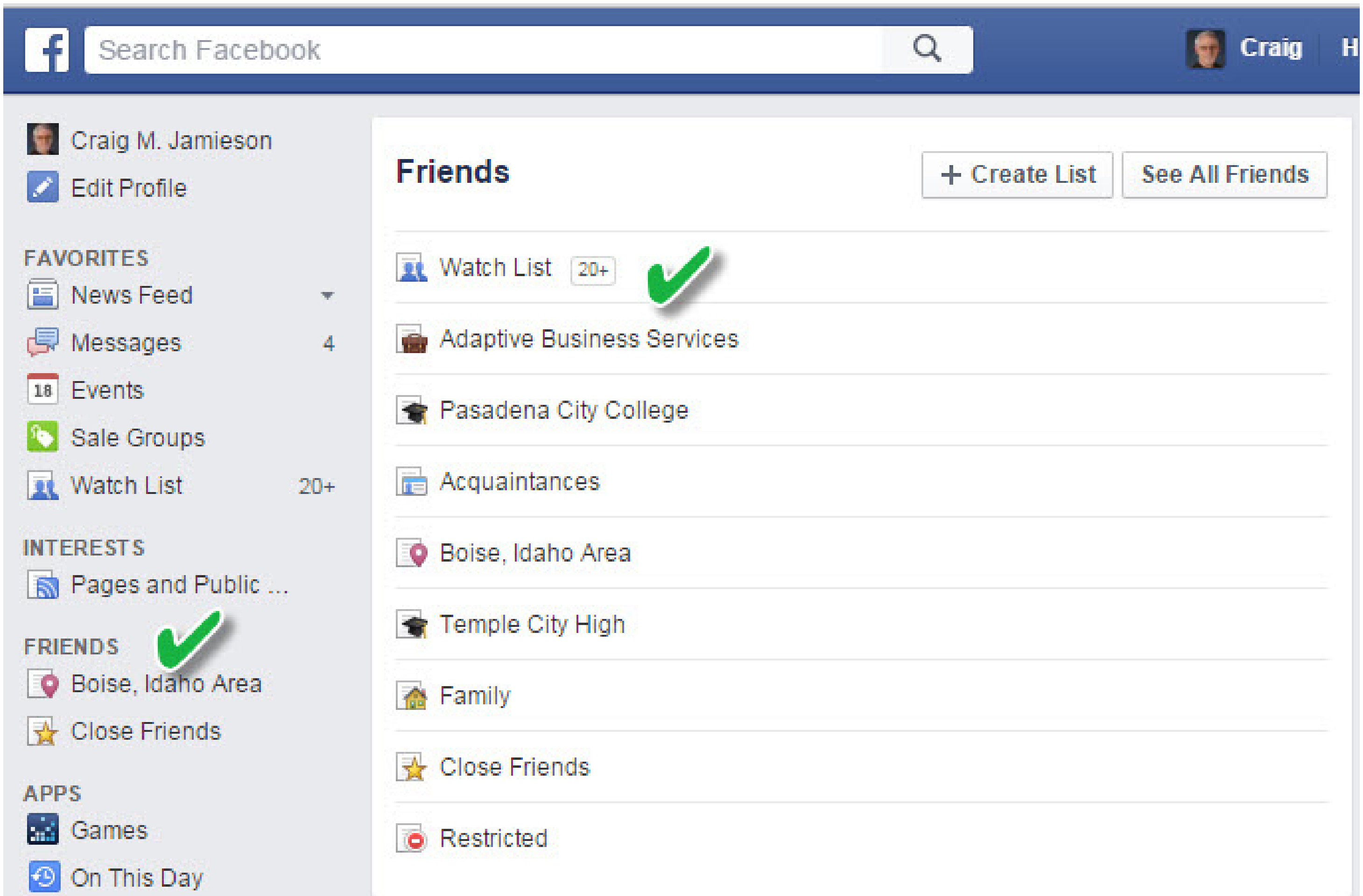
While you do have some options in terms of hiding updates from selected connections, you are exposing yourself to **disastrous consequences** (I've tested them) down the road if, at some point, you should wish to reverse any or all of these actions. Therefore, the only areas that are practical would be a regular review of a specific connection's updates, from their profile page, and then closely monitoring your general news feed.

Next, initiate connections when appropriate (people how you have engaged with previously, who know you, and will accept a connection request at this early time). Connection requests and private messages should be personalized, identify commonalities, and/or cite something specific that you admire about them or their work. Remember WIFM (What's In It For Me?). If you want something from somebody, what's in it for them? Be sure to thank them after they accept. Other connection requests will be made following suitable progressive engagements.

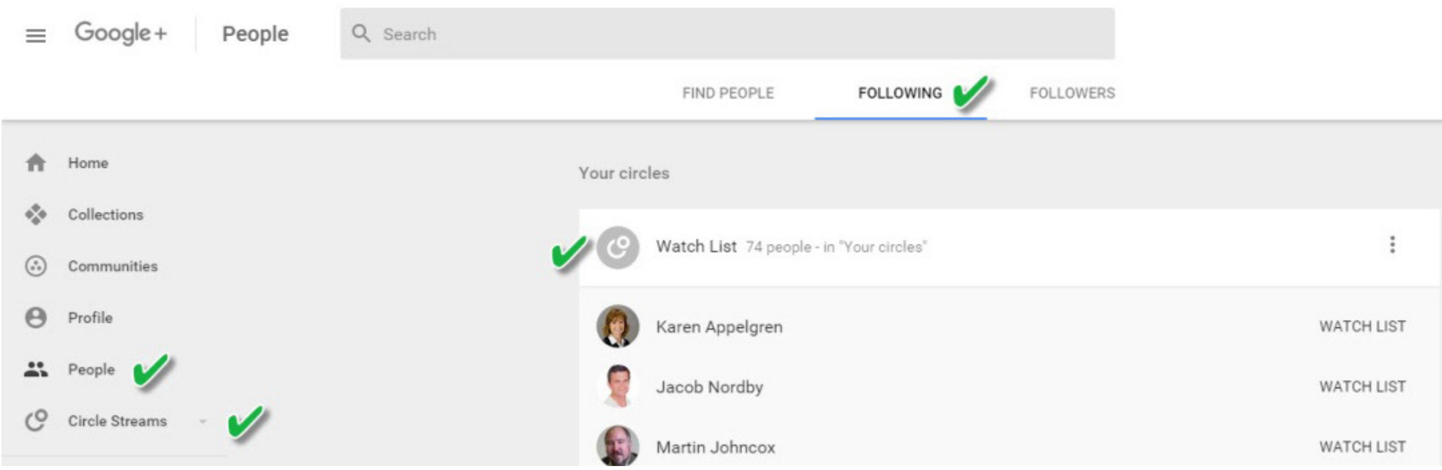
Twitter - There are two types of lists that you can create on Twitter and these are either public or private. Public lists can be viewed and followed by **anybody**. Assuming that the people on your lists are very important to the health and wealth of your business, I would **strongly** suggest that you make these private and for your eyes only. Your top competitors may not be as bright as you are and it is sometimes entertaining to look at their public lists and finding one named "My best customers".

If you already have existing lists on Twitter, you can remove them or leave them based on your preference. You will be creating one or more new **private** lists and you will assign people to their list(s) by visiting each one's profile page.

Facebook - Evaluate your existing lists on Facebook, get rid of those without value, and create new list(s). These lists are automatically private. Facebook also offers something called Interests (private or public lists) that can include pages, topics, and even people who you are not friends with (primarily well known celebrities). In order to create a list on Facebook, just go to your Friends tab and it looks like this ...



Google+ - As opposed to lists, Google+ uses circles. If you have existing circles on Google+, get rid of those without value, and create your new circle(s). In Google+ your circles are private.

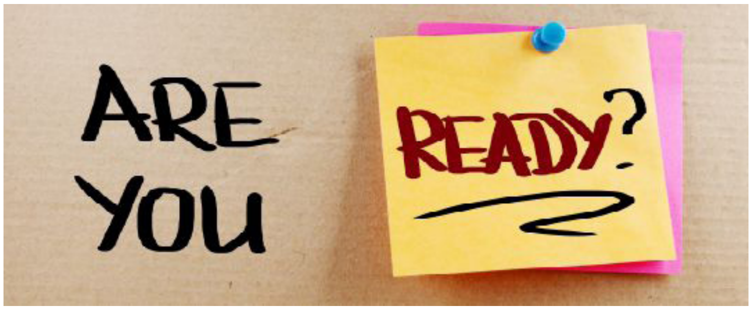


Do the same for any additional pertinent networks (providing that they offer this capability).

What you have now created are very quick and easy ways to go to any of the social networks and only look at those updates that are being shared by your top 360 (with the exception of LinkedIn) and these people represent those who have the highest likelihood of doing business with your company based on meeting your targeted buyer persona criteria. Nice!

CHAPTER 8: PREPARING TO ENGAGE!

Our next step will be to begin to monitor and engage with these selected people by using a progressive engagement strategy. Before we do that, developing some guidelines might be in order.



Goals

Before making any taps or touches, you will want to be thinking about …

- When will it be? - The simple answer to this is when it is appropriate but, no later than your recurring schedule. However, never force a touch when it would not be appropriate!
- What are you hoping to accomplish with these? - Are you looking for some sort of response or for a specific action to take place? Certainly, this would be the case with many touches.
- What will your next engagement be? - We want to be able to provide unique and memorable taps and touches each time so mix it up! Also remember that we are progressively moving these relationships forward toward our stated goals. Just tapping someone for the next year will get you nowhere.

When you begin with the end goal in mind, and you plan your steps accordingly, getting there becomes the natural result.

Review your engagement inventory

Taps basically say … "I'm thinking of you!". On the other hand, a touch will be much more direct.

As we are looking to make taps and touches progressively, we can also envision these as stages which will move the relationship forward toward our ultimate goals. Here are a few examples …

- **Stage 1** - Taps - Like, share forward, RT, endorse
- **Stage 2** - Touches (electronic) - @ Message, direct message (private), comment, recommend, send article, text, email, electronic greeting card, electronic newsletter
- **Stage 3** - Touches (real-life) - Phone, Skype, Hangout, donuts, drop-by, referral, introduction, mailed card, mailed marketing pieces, delivered gifts

One of the really great ways to make unique touches it to share personally selected articles via a reader like Feedly. Set up a folder in Feedly for each of your contacts and, as article sources, add their blog (you will promote them) as well as two or three good sites that talk about those types of things that are important to them such as their industry.

When emailing a link to an article, I would suggest that you might want to personalize this email with something like … "I found this article referring to widget building and I thought you might enjoy it! Thanks for all you do and have a great day!"

If you doing this, and particularly doing so consistently and effectively, I can just guarantee you that you will be the only person who is doing so, This makes this action both unique and extremely powerful!

Recurring reminders

These reminders are your minimum engagement schedule. It will be important that you register these touches manually in your CRM if it does not recognize them automatically.

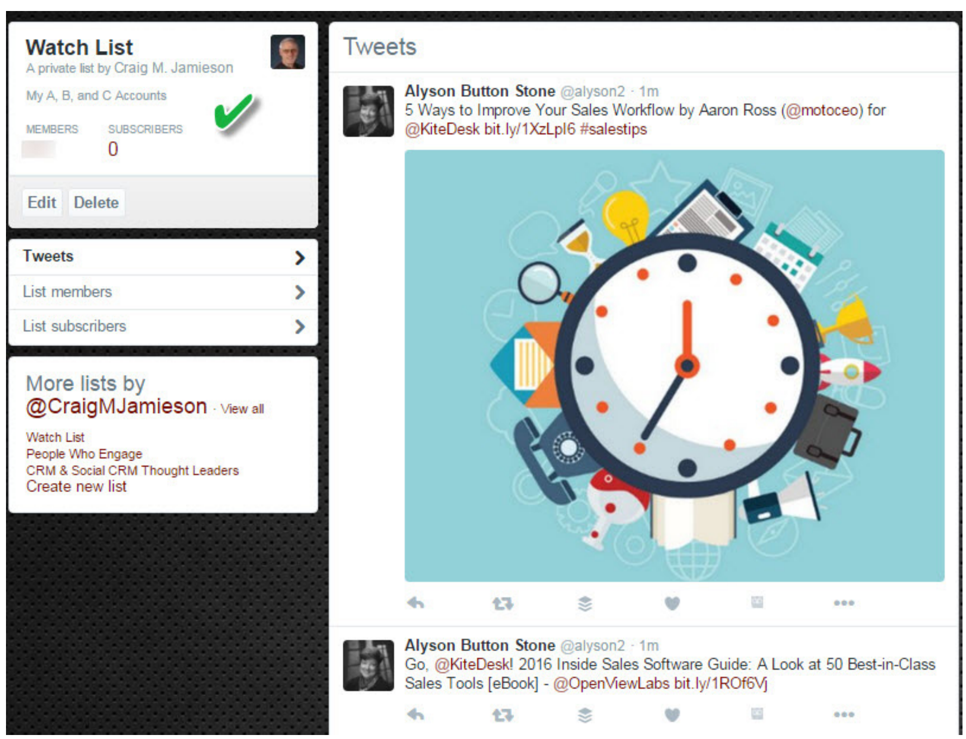
CHAPTER 9: MONITOR AND ENGAGE!

Before you actually engage, review your existing notes and records of previous conversations (social or otherwise). This will place whatever you about to do in the correct context and will also demonstrate to the customer that you can listen!

Monitor daily

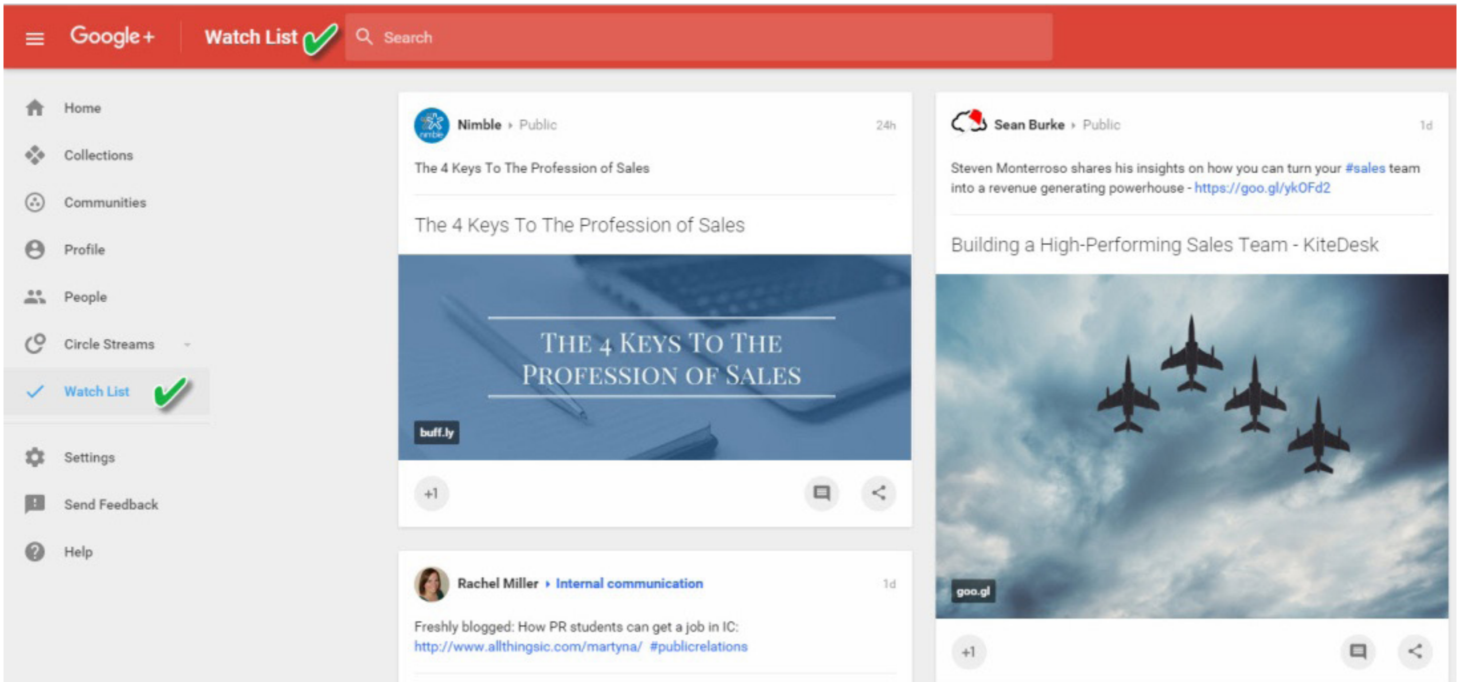
With your news feeds filtered to show updates from your chosen 360, I would expect that, depending on how active your network is with sharing, you should be able to monitor and engage in as little as 30 minutes per day.

Twitter - In order to monitor a filtered news feed from Twitter, from your profile page, select "Lists", "Subscribed to", and then select your list. "Member of" are the lists that other people have you added to. "Subscribed to" lists will include public lists by others that you have subscribed to follow.



Facebook - From your Facebook news feed, select "Friends" and then click on the list name. You will now have a filtered news feed showing updates from that list only.

Google+ - Google makes it even easier as your lists are shown on the left sidebar menu. Note that you will need to go into your Google+ settings and turn on this ability.



You will now be able to quickly and easily monitor updates from these three social networks from those folks who have met your buyer persona. If you wish to view your entire news feed on any platform, just turn the active list off.

LinkedIn - You will need to go to each profile (use your tags in LinkedIn to assist you in identifying these folks) to review their updates individually and on a regular schedule. If you are visiting their profile regularly, you may want to do so anonymously so that you will not be identified as a creeper. You can also choose to monitor your entire news feed. Either way, you will also see who they are talking to (comments, likes, etc.). Might there be potential relationships there for you as well?

Depending on an individual's privacy settings, you may be able to follow someone on LinkedIn and at least see their published shares. Go to their profile, view recent activity, and you will find a "Follow" button. This is a great way to get a feel for someone prior to adding them to your list and/or extending an invitation to connect.

Engage!

Touches and taps should be made based on your recurring schedule or if important. Beware of too many touches in too short of a period. However, it is critical that you engage with your people consistently and that you approach this as a long-haul strategy. If your target account is currently blissfully being serviced by a competitor, breaking in could literally take years. It is your goal that, should an opportunity arise, you should be the first person that they think of and, if you have done this correctly, you will be.

Expecting to make 7 to 10 touches to gauge whether or not an opportunity will ever present itself, is a perfectly reasonable expectation. In terms of your existing accounts, as statistics show that it can be up to 10X more expensive for you to find and bring on a new account than it is to maintain an existing one … why would you not want to do this?!

Engage progressively and remember that your goals should be to …

1. Initiate a relationship.
2. Develop that relationship.
3. Take this relationship to some level of real-life.
4. Earn the right to compete for mutually beneficial business opportunities.
5. Solidify the relationship long-term.
6. Never get lazy and complacent. You have worked hard to get to this point and taking your customer(s), and your potential customer, for granted is the equivalent of buying them a one way ticket to Competitorville.

Don't forget to engage on LinkedIn groups!! You can be part of the 5% cream that floats to the top! Groups, providing that they are occupied by folks who could fit your buyer persona are, if nothing else, your farm league. These are the players who could very well move up to the majors and play or your A, B, or C squads. You should try to belong to groups that are frequented by folks that are on your target list.

Register your engagement in your CRM

You simply must keep good notes and this is one of the major benefits of any CRM. Register each touch (what you did specifically), the results, and your next step. Then, set a reminder (if your CRM does not have a recurring reminder system) for your next tap or touch.

CHAPTER 10: MANAGING YOUR PROGRAM

By now you should have begun your program of progressive engagement, timed by your recurring reminders and/or appropriate opportunities, with your classified contacts. Keep in mind that is your goal with any account is to be viewed as an integral member of their team, a trusted advisor. Trusted advisors are awarded jobs. They don't bid on them.

Of course, you are still expecting to see results! Earlier on you established some benchmarks for comparison. Yes? If not, please go back now and do so now as, without them, it is only going to be your best guess as to if this program is working for you or not. Without expectations, you will never know if they have been met or exceeded.

I might suggest that you review your activities and, more importantly, your results monthly. Evaluate your successes and your shortcomings and plan for your next month from there.

As you manage and refine your program, certain questions will arise ...

How often do I need to reassess my contacts and their classifications?

In a perfect world, C contacts will move up to B, B to A, and A's will stay where they are. However, since no world is perfect, some will move up rather than down while others might be reclassified as being D (delete).

Before you make any of these shifts, you should first take a closer look at what, and why, is going on. You will need to evaluate your own efforts. Look at your number of touches, their quality, frequency, type, and have they been progressive? Have you given them a fair opportunity?

This all being said, I do think that you need to take a closer look at all of your contacts, and their classifications, quarterly. Certainly no later than every six months. Apply your buyer persona and business metrics to each. Your goal is to optimize the health of the herd and, if you need to send a few to the slaughterhouse, that opens up important slots for new, and better performing, contacts.

My classification mix is off-balance.

We talked about a potential mix of 15% A accounts, 30% B, and 55% C. Now you find yourself with a database that is more like 5%, 25%, and 70%. Why? Have all of your A's and B's been moved down to C? Did you never find enough A's or B's? Is it convenient to leave people at C with the hope that someday they will be worth something? Someday rarely comes.

I'm having trouble moving people forward toward a business relationship.

Are your taps and touches being conducted on schedule and are they progressive? Progressive engagements are designed to move people either forward or out. What have you done to move this relationship forward?

What do I do with new opportunities or contacts that are not now on my list?

If your contact list size is at your maximum, you are going to have to bump somebody(s) off of your list. But, before you do that, is this new contact somebody who looks pretty at first glance or is it somebody with a quantifiable substance on paper? Apply your buyer persona before proceeding. You might add these to your B or C lists and then work toward developing them up.

I can't keep up with my schedule!

Maybe you need a smaller total list. Maybe you have too many A accounts who don't really qualify as such and who take too much of your time based on the recurring taps and touches that are required. Then maybe you need to become more efficient or work harder. I really can't answer that for you but, there is selling time (when we can be in front of customers) and non-selling time (typically evenings and weekends). Top salespeople have always recognized that successful selling does not mean 9 to 5 Monday through Friday only.

I can handle more accounts!

The first question is … are you at your agreed to total number (360 or whatever you chose) and how does your mix look? Then … are you making the taps and touches according to your specified schedules? A accounts are to be contacted more than B or C accounts. If you have no A accounts, you will probably have time on your hands and one of the things that we had suggested is that you evaluate your anticipated workload prior to deciding on your number and on your mix.

Therefore, if you can answer yes to both questions, feel free to increase your numbers. If not, get your program in balance.

For those of you who have followed, or are perhaps implementing, this program, thank you and I would love to hear about how it is going for you!

ABOUT CRAIG M. JAMIESON

Craig M. Jamieson is the managing member of Adaptive Business Services in Boise, Idaho.

Craig has been in B2B sales since 1977 and during that time, has served in a variety of positions including sales manager, division sales manager, national sales manager, district manager, and business owner. He has taught salesmanship at the university level and has been self-employed since 2005.

Craig is a Nimble Social CRM Solution Partner, a TTI Performance Systems VAA, and he also provides training and consulting to businesses on how to leverage social selling tools, techniques, strategies, and Social CRM to increase their revenues.

Craig is the author of "The Small Business' Guide to Social CRM", writes a monthly column on social selling at Maximize Social Business, and has been named as a Top 100 Influencer in Social Sales and his blog has been recognized as both one of the 44 Best Sales Blogs in 2016 as well as providing one of the Best 20 Blogs for B2B Sales.

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