

GUIDE

# Social Selling Demystified

The definitive guide for marketers



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## Your sales team needs to be on social

As people increasingly use social media to inform their buying decisions, social has evolved from a branding, awareness, and conversation medium into a powerful sales tool.

Many organizations, particularly in financial services and B2B, are already seeing excellent results when using social media to reach potential buyers beyond the awareness stage of the typical journey from stranger to customer. They are going where their customers are on social to build more meaningful relationships and become trusted advisors and influencers.

This strategy has become known as “social selling.”

Social selling provides a way to generate more leads and drive more sales. When implemented strategically across an organization, it enables marketing and sales to build a “united front” in the battle to win hearts, minds, and dollars through social.

Just as importantly, social selling also helps marketers prove—and improve—social ROI.

If this all sounds a little too “magic unicorn” to be true, read on. You’ll learn what social selling is, why it’s important, how it works, and how marketers can help sales teams succeed on social.

Bottom line: If you want to use social to improve revenue, you need to get your sales team on board.

**According to Forrester Research, companies that have formal and structured social selling programs in place are already seeing results such as 18% greater lead volume and 17% faster lead conversion among reps who use social consistently versus those who do not.<sup>1</sup>**

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# What's in this guide?

## 1. What is social selling?

What social selling is and why marketers need to know about it.

## 2. What's driving the rise of social selling?

Why has social selling evolved into a powerful way to drive social ROI?

## 3. The benefits of social selling

What marketers need to know about the benefits of social selling.

## 4. Marketing's role in social selling

The central role marketing teams play in social selling.

## 5. How to get started

What to do first when considering a social selling program.

## 6. How others do it

Learn how three companies drive business growth through social.

# 1. What is social selling?

Social media no longer only lives in the marketing department.

Social selling is another chapter in the story of how social media has spread from the marketing department to touch every part of an organization—from branding and communications to human resources, sales, and customer service.

## Social selling is:

- **The use of social media to identify and engage prospects and customers at the right time, in order to build and nurture relationships.**

A **more sales-focused definition** in the context of a salesperson's role is:

- **Social selling leverages a salesperson's professional brand to fill their pipeline with the right people, insights, and relationships.**

Social is where your customers learn, seek, discover, and decide. According to Forrester Research, 57% of the buyer's journey is done before a sales rep is involved.<sup>2</sup>

Social selling's huge potential to transform an organization's operations and drive revenue comes from its capacity to influence potential customers at any stage of the buying journey. The earlier a salesperson engages in that journey, the more time and opportunity they have to build sufficient rapport and trust to make a sale.

The sweet spot for social selling to begin in earnest is after the initial awareness stage, i.e., from the launch of a lead generation or other social media campaign to when a salesperson decides the time is right to make a pitch or request a meeting or call. This is when the benefits of marketing and sales teams working closely together to implement a strategic social selling program really kick in.





## What social selling is *not*

Whenever new terminology enters the marketing and social media lexicon, it sometimes helps to stress what it is not as well as what it is. For the avoidance of doubt, here's what social selling is not:

- **Cold-calling type outreach:** Social selling is not about contacting people out of the blue via social media.
- **Asking for the sale:** Social selling does not involve salespeople sales people reaching out to leads and asking for a sale.
- **Click here to buy now:** Social selling is not direct selling via social media using buy buttons and ecommerce links.

Instead, social selling is about educating and engaging with prospects in a way that is personal and authentic, with the aim of driving deeper engagement that results in a sales meeting or call. After all, social media began and grew through connecting people to people, not people to products.

Successful sellers leverage social to listen for the right opportunities to engage. They use their networks on platforms like LinkedIn and Twitter to find, relate to, and engage with potential customers until the time is right to move the sales process forward.

## Why does this matter to marketers?

Social selling is not just the evolution of sales. It's also the evolution of marketing. The story here for you, as a marketer, is not only that social selling can improve your company's bottom line, it's how it can also help you to:

- Leverage your sales team's skills and knowledge
- Build on your brand awareness efforts and deliver more value
- Create a solid case for more budget and more resources to help you generate even more ROI through social

Social selling is the quickest and most cost-effective way to extend your current social activities. It lets you expand your marketing team through the addition of a social selling program that includes your salespeople as fully engaged partners and 'mini-marketers.'

While social selling needs the sales team on board to be successful, it's invariably the marketing team that has the social media skills, and budget, to plan for a cohesive and robust social selling program.

The rest of this guide lays out the main benefits of social selling in more detail and provides pointers to help you begin the process of getting buy-in.



## 2. What's driving the rise of social selling?

Social selling is an inevitable consequence of social buying.

### The customer journey is changing

Over the past decade, your customers have become digitally empowered, highly informed decision makers. Consumers and B2B purchasers alike have been leveraging social media to find deals, research products, and make recommendations.

The upshot is that sales teams depend on marketers to create leads, generate content, and help them build rapport more than ever before.

### Social business is changing

In response to how people use social media, the whole practice of social business is evolving. Social is spreading into so many other business functions that the marketing and social team can no longer operate as a silo.

According to Altimeter, siloed departments make it difficult to create a seamless buying experience for customers.<sup>7</sup> Marketing, sales, and customer support teams need to work together. Implementing a social selling program is the perfect way to get marketing and sales teams working closer together for mutual success.

### 74% of B2B buyers

conduct more than half of their research online before talking to a sales person.<sup>3</sup>

### 57% of the buyer's journey

is done before a sales rep is involved.<sup>4</sup>

### 90% of prospects

hit the delete button when receiving an email from someone they do not know.<sup>5</sup>

### 95% of B2B buyers

chose the vendor that supplied relevant content throughout the sales process.<sup>6</sup>

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## 40% more qualified leads

are generated through social selling than cold calling. (Source: *Customer Think*)

## 72% greater likelihood

of exceeding quotas for B2B sellers who embrace social selling than their peers who don't.<sup>8</sup>

## 79% of advisors

have gained new clients via social media.<sup>9</sup>

## 7 in 10 financial advisors

are already using social media as a key wealth and trust-building tool. (Source: *Forbes*)

### Social selling works

Using social media for brand awareness is by now a mature strategy within most organizations. Social selling has yet to reach that level of cross-organizational buy-in and adoption. People are doing it, but often at an individual salesperson level rather than in an organized way.

However, as companies' social selling programs mature, the case for doing so is becoming clear.

Social selling is proving to be a huge opportunity for financial services companies in particular, which traditionally rely on sales agents and face-to-face or telephone communications to build trust and generate business. However, most B2B and consumer businesses with sales teams can benefit from a social selling program.

### Don't get left behind

Social selling is definitely a priority for North American social teams in 2017, with 38% identifying social sales program development as a top five objective.<sup>10</sup>

Forrester Research says, "Social selling has typically lagged behind social marketing initiatives. As gaining access to buyers becomes increasingly difficult, B2B sellers will need to fully embrace this channel. For B2B marketers who support sales, social efforts must integrate with their broader social marketing strategy."<sup>11</sup>



## 3. The benefits of social selling

Social selling is a clear opportunity to deliver social ROI, and connect social back to business goals.

### Increase social ROI

According to Forrester Research, social selling paves the way for more meaningful connections.<sup>12</sup> It moves social from being mostly about mass awareness campaigns to setting up the one-to-one communications sales teams need to close deals. In this way, social selling helps organizations tie social programs to revenue generating activities. As marketing departments are increasingly asked to prove social ROI, social selling provides a way to do this.

### Break down silos

The process of setting up and implementing a social selling program has the potential to bring marketing and sales teams closer together than ever before.

Altimeter highlights the need to align marketing and sales and create a unified social selling process as a key driver of success. A third of a sales rep's time is spent searching for or creating content, time that could have been spent engaging in sales conversations if marketing was involved.<sup>13</sup> Marketing teams can then benefit from the deep and real-time knowledge of customers that sales teams gain from these social conversations.

### Enhance the customer journey

Customers enjoy a more seamless experience when the messages they receive across social networks are consistent in their tone, messaging, quality, and relevance. Their perception of and trust in that company is more likely to be positive as a result, which is a primary aim of social selling.

In a Qvidian report<sup>14</sup>, nearly 70% of customers indicated the "consistent and relevant communication provided by both the sales and marketing organizations" was key in choosing that firm as their vendor.

### Extend the reach of your content

You pour a lot of time, resources, and money into developing content designed to resonate with your audience and make them aware of your brand. Social selling programs can extend the reach of that content, and help you get more from your budget, by laser-targeting your content to people you know have already embarked on a buying journey. Partnering with your sales teams to develop a social selling program is the best way to accomplish this.

## Gaining buy-in

One of the main challenges for marketers is gaining buy-in from executives and sales teams. It's important to clearly lay out the benefits to sales teams in a way that resonates with them. Social selling can help sales teams do the following:

- **Uncover more leads**

With more ears to the ground and content being amplified through sales networks, fewer sales opportunities will be missed.

- **Increase LTV and deal sizes**

The rapport and trust built up through social media builds better relationships and leads to more sales.

- **Convert more leads**

Social selling lets salespeople discover buying signals to know when to engage with prospects, enabling them to offer the right solutions at the right times.

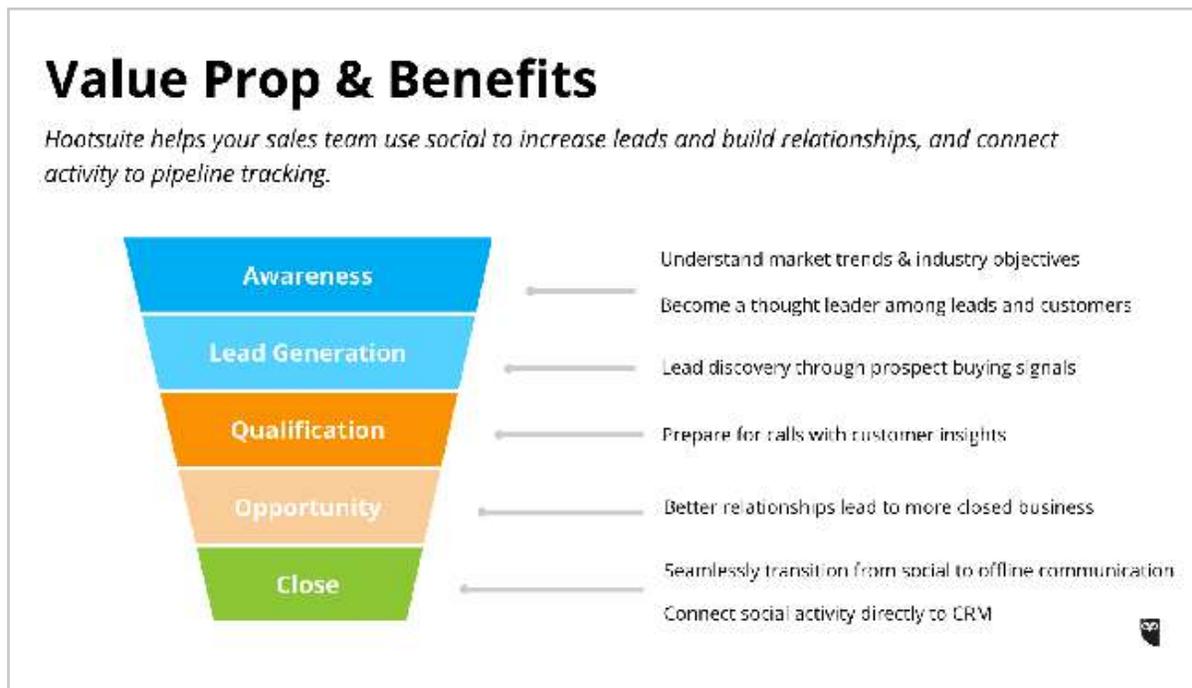
- **Improve win-rates**

Salespeople can engage customers throughout the sales cycle in a non-intrusive and authentic way. They can prepare for calls with up-to-the-minute customer insights.

- **Build personal brand**

Salespeople are increasingly aware that the demonstrable strength of their social networks helps their career in their current position, and in future. Success in sales is all about having the skills to build strong networks, which now includes social media networks. Sales managers increasingly look for social selling skills.

Here's a snapshot of how social selling can benefit your sales team and organization at every stage of the buyer journey:





## 4. Marketing's role in social selling

You can help your sales team find and nurture quality leads, gain insights about prospects, and drive revenue through social.

When a sales team has the right people, insights, and relationships in their pipeline, they'll find it much easier to build meaningful relationships and convert prospects into sales.

Marketing's role has traditionally been to feed leads to the sales team, who then try to make a sale. With social selling, salespeople get involved at a much earlier stage. Your role evolves to include equipping the sales team with everything they need to build strong relationships

along the buyer journey. This successful alignment of marketing and sales is the most important thing to get right.

### The three stages of social selling

A successful social selling program includes three main stages. Marketing can help meet the specific needs of salespeople at every stage by providing training, processes, content, analytics, and tools.



#### Stage 1: Build social presence

Sales need: **Build individual brand**

*"I need to maintain my presence on LinkedIn and be seen as an online influencer. But I don't want to take time away from making sales. I would like to be able to share content to my networks via mobile as I'm often out of the office."*

Marketing can help salespeople to:

- Level up their social media skills
- Share approved content and industry news through social channels
- Build connections online



### Stage 2: Nurture relationships

Sales need: **Monitoring buying signals**

*"I want the ability to listen and track conversations that are relevant to my business. Staying up-to-date with my customers and industry news ensures I'm speaking their language and know what they care about. When important news breaks, I want to be able to quickly inform my network of customers how it's going to impact them."*

#### Marketing can help salespeople to:

- Listen to key contacts
- Monitor social channels
- Keep tabs on the competition and industry



### Stage 3: Engage and drive leads

Sales need: **Engaging contacts**

*"I want to easily find opportunities to engage with new and existing contacts to build relationships. Responding and amplifying their posts shows I respect their voice. I want to have back and forth conversations with my customers throughout the buyer's journey and be the first person they come to for solutions."*

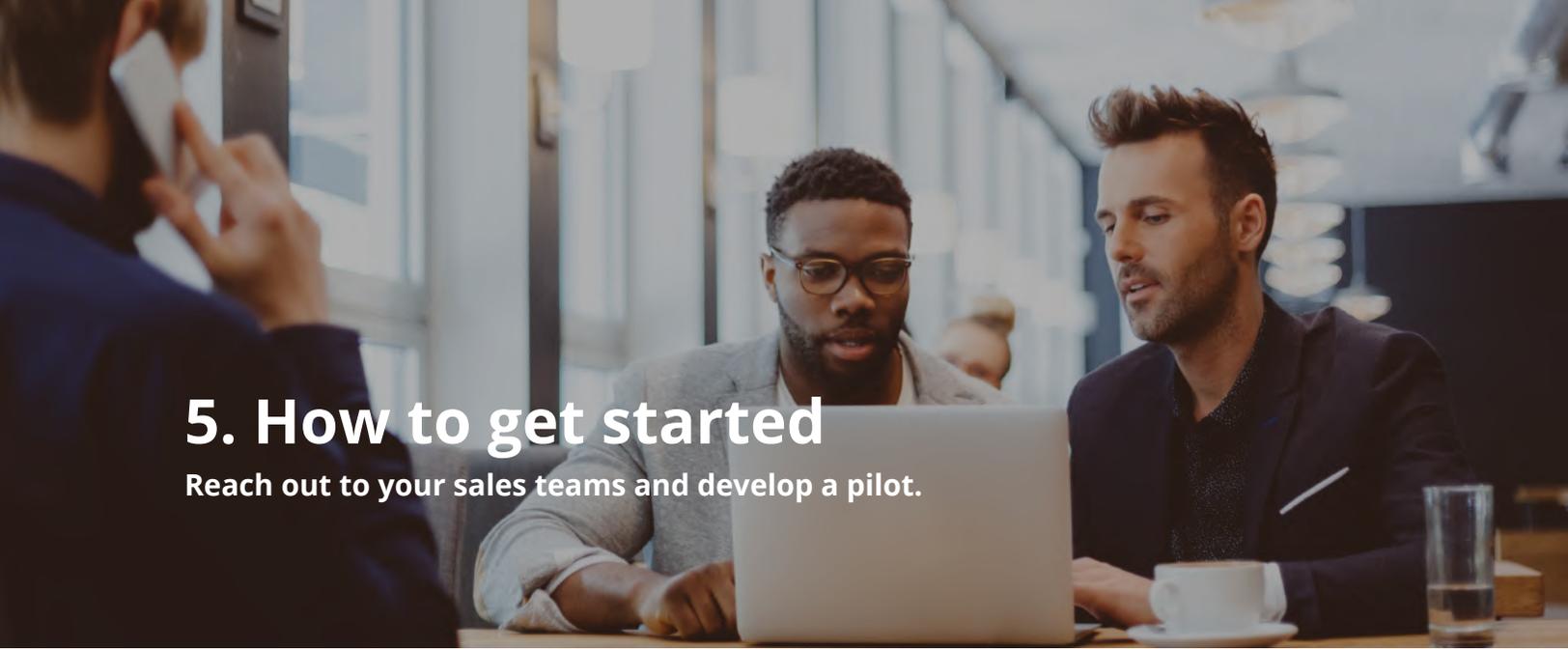
#### Marketing can help salespeople to:

- Regularly engage with key contacts
- Pick up on and reply to buying signals
- Stay connected throughout the sales cycle

## How to prove social ROI

As a marketer you're already aware of the importance of constant tracking and measuring. As your social selling program matures, it pays to keep a close eye on the following:

- **Are salespeople using social media effectively?** Measure things like post volume and tone of voice, network growth, and profile completeness and adherence to best practices.
- **Are salespeople sharing the most effective content?** Measure things like link clicks, web traffic and conversion metrics, and volume of leads generated.
- **Are social activities impacting the bottom line?** Measure things like leads, pipeline, conversion, and social influence in CRM and marketing automation tools.



## 5. How to get started

Reach out to your sales teams and develop a pilot.

Rather than get into too much detail about specific social selling tactics, this guide is more about the concept of social selling and how it can bring marketing and sales teams closer together to drive social ROI. Here are a few things to start thinking about.

### Build your case

Use this guide and other sources of information on social selling to build a compelling story tailored to your organization's needs. Look at including the following:

- What social selling is and how it has evolved
- Why the time to start building a social selling program is now
- How social selling can benefit customers and the business, as well as marketing and sales teams
- What tools are available
- What needs to happen first to start the process

Ideally, you need to build a case with your sales team already on board. A joint pitch to management will always carry more weight. That in itself demonstrates the capacity of social selling to bring marketing and sales teams closer together.

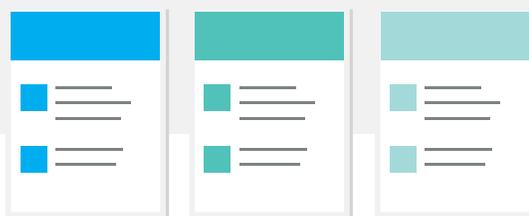
You may meet some resistance, especially in these areas:

- Skepticism about social media as a sales tool, or even in general
- The idea that social media takes salespeople away from being out in the field or making calls
- A belief that their audience doesn't use social media

One example you can quote is NFU Mutual in the UK, which has had a lot of success with their social selling program. What's interesting about this organization is the fact that it's a very traditional business, with traditional salespeople and often very traditional customers. This makes it a great example to use if you encounter scepticism about the potential of social selling from salespeople who are not digital natives. Read NFU Mutual's social selling story in section six of this guide.

### Create a pilot

A pilot program is a good way to demonstrate the success of social selling and define how it will work. Start by identifying any salespeople within your organization who might already be doing social selling on their own.



Koka Sexton, global industry principal of social selling at Hootsuite and former head of social media at LinkedIn, has experience with social selling as part of both marketing and sales teams.

“At every company I've ever been a part of, or been brought into, there's always at least one salesperson who's already doing social selling and doing it fairly well. They've usually taught themselves through blogs, videos, and other sources,” says Sexton.

“Marketers should identify who those individuals are and build the internal championing of social selling around that.”

When identifying pilot participants, don't forget non-digital natives—older salespeople who may not have grown up with digital tools.<sup>15</sup>

While digital natives within your sales team who have grown up using digital will immediately understand what you are trying to do, non-digital natives can bring huge sales experience and customer knowledge to the pilot program. It's important to get representatives from both these groups on board at the same time.

## Develop a playbook

You should aim to develop a playbook for everyone involved in the social selling program. This contains what works and what doesn't, policies and guidelines, roles and responsibilities, and common definitions for things such as what a qualified lead looks like.

During the pilot program, encourage participants to take screen shots of things like LinkedIn InMails, customer email exchanges, social media posts, and other communications that detail the conversations

salespeople have. This tells the story of how a salesperson communicated with a prospect individual and ultimately either scheduled a meeting or closed a deal. It can help you formulate social selling best practices for your organization by leveraging the successful patterns of top salespeople

## Identify how you can help sales teams

When it comes to aligning marketing and sales teams more closely, Altimeter's report into social selling<sup>16</sup> identified the following key things to get right:

- Shift the mindset from selling to relationship building
- Focus training on specific skill development
- Spread stories of quick wins to establish new habits
- Ensure leadership engagement, especially in Sales

As well as taking a lead in the adoption of social selling, marketing can help in several practical ways, some of which we touched on in the previous section of this guide. They include:

- Social media training and insights
- Content creation, management, and distribution
- Social media policies and guidelines
- Tracking and analytics

Another important role of the marketing team is to research and purchase the right tools, and deliver proper training to ensure adoption. Ideally you should do this at an early stage so you can incorporate them into your pilot program.

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## How Hootsuite helps



### Measure social selling ROI

Forget vanity metrics. LiftMetrix by Hootsuite lets you measure the full social conversion funnel, providing end-to-end ROI measurement of true business metrics, such as purchases, sign-ups, email acquisition, and more. LiftMetrix explains the “why” behind each metric in easy-to-understand language to enable you to easily refine your content strategy.

[Learn more](#)



### Share the right content

Providing the right content is one of the main ways marketing can help sales. Hootsuite Amplify makes it easy for salespeople to safely share your content to extend your social reach and help them forge deeper connections within their networks. It helps you ensure that sales teams only share approved content with a consistent voice, resulting in a more seamless customer experience.

[Learn more](#)



### Provide training and insights

Help salespeople connect with prospects on social media more effectively and efficiently so they can fill their pipeline with prospects. Hootsuite Academy offers an industry-recognized Social Selling Certification course designed to equip salespeople with the skills they need to boost sales results with social media.

[Learn more](#)



### Monitor industry conversations

Help salespeople establish themselves as trusted experts and influencers within their social networks. Hootsuite Insights uses advanced social media analytics to better understand customers, measure campaigns, spot opportunities, and get a 360-degree view of how social media is influencing sales.

[Learn more](#)



## 6. How others do it

Learn how companies drive business growth through social.

### **Penn Mutual: Compliant content sharing**

The Penn Mutual Life Insurance Company offers life insurance and annuities through a large national network of advisers. Among other objectives, the company wanted to educate advisers on social selling and provide them with the tools they needed to leverage social to drive business. Penn Mutual adopted Hootsuite to enable their advisers to easily share compliant social content from an extensive content library. In addition, Hootsuite's mobile apps fit well with the company's mobile-first philosophy.

Education around social selling and building social networks is a major factor in the successful adoption of social selling among Penn Mutual's advisers. Hootsuite has been instrumental in partnering with Penn Mutual to deliver a comprehensive program.

### **Canaccord Genuity Wealth Management: Empowering advisors**

Canaccord Genuity Wealth Management is a premier global, boutique wealth management firm. The company wanted to empower investment advisers to better connect, engage, and listen to learn from their existing and prospective clients.

Similar to Penn Mutual, the main challenge was how to connect and engage with their audience in a timely and relevant manner—while meeting regulatory requirements. Canaccord Genuity Wealth Management rolled out Hootsuite to its investment advisers, providing them with training and tools they need to listen and engage with prospective or current clients in a compliant manner.

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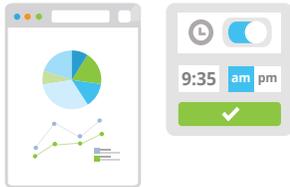
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## Social Marketing



## Social Selling



## Employee Advocacy



## Social Customer Service



Hootsuite is the most widely used platform for managing social media, loved by over 10 million people around the globe and trusted by more than 800 of the Fortune 1000. Hootsuite Enterprise empowers organizations to execute business strategies for the social media era and scale social media activities across multiple teams, departments, and regions. Our versatile platform supports a thriving ecosystem of social networks complemented by 200+ business applications and integrations, allowing organizations to extend social media into existing systems and programs.

Along with our channel and agency partners, we help organizations build deeper relationships with customers, stay connected to the needs of the market, grow revenue, and draw meaningful insights from social media data. Innovating since day one, we continue to help organizations pioneer the social media landscape and accelerate their success through product training, group training and tailored organizational training, as well as security and compliance services.

Request a custom demo today by visiting [enterprise.hootsuite.com](http://enterprise.hootsuite.com)

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