GUIDE

Creating a Social Selling Action Plan

How marketers can help sales teams succeed
Creating a Social Selling Action Plan

How marketers can help sales teams succeed

Contents

1. The evolution of sales ............................................................................................................................... 3
2. Define marketing's role .......................................................................................................................... 4
3. Get buy-in ................................................................................................................................................... 5
4. Perform an audit ........................................................................................................................................ 7
5. Build your strategy .................................................................................................................................... 9
6. Roll out a pilot ............................................................................................................................................ 11
7. Scale your strategy ............................................................................................................................... 12
8. Success stories ......................................................................................................................................... 13
The evolution of sales

Social media is transforming the sales process. Social is now where your customers discover what you offer, research your products and services, and decide whether to buy from you. Social selling empowers your sales team to join the conversation on social to generate more leads and drive more sales.

A successful social selling program brings marketing and sales teams together. Salespeople learn to identify and engage prospects or customers on social at the right time to build and nurture relationships. Social selling amplifies a salesperson's professional brand, helping them fill their pipeline with the right people, insights, and relationships.

Social selling is not asking for a sale, making a pitch, or cold calling through social channels. Instead, it's about educating and engaging with prospects at every stage of the buying journey in a personal and authentic way. The goal is to drive deeper engagement that results in more sales meetings and calls—and ultimately more sales.

Working together is key. For social selling to work, the marketing team needs to provide salespeople with everything they need—from training to processes and content. And sales teams need to bring their deep customer and sales knowledge to the table. Together, you can make great things happen.

Why social selling?

- Increase social ROI
- Extend the reach of your content
- Generate more leads and sales
- Increase customer lifetime value
- Build more meaningful relationships
- Break down internal silos

This guide builds on the information in Social Selling Demystified, which is a more general introduction to social selling. Each section contains practical next steps to help you champion social selling internally and start building an action plan for your organization.

---

40% more qualified leads
than through cold calling.
(Source: Customer Think)

79% of advisors
have gained new clients via social media.
(Source: Putnam Investments)

72% greater likelihood
of exceeding quotas.
(Source: Forrester Research)

7 in 10 financial advisors
are already using social selling.
(Source: Forbes)
Define marketing’s role

Marketing is key to the success of social selling. Don't focus on the word “selling”—think about how you can help your sales team build meaningful relationships on social, in turn increasing their chances of making a sale. For that to happen successfully, marketing needs to equip salespeople with the right social tools, skills, content, and best practices.

“The key thing to make it [social selling] a success is support from the marketing team.”
- Ryan Vince, head of social at NFU Mutual.

1. Champion social selling
Marketing usually owns social media strategy. That means you are best placed to champion social selling across the organization and educate teams on how best to social.

2. Provide training and insights
Marketing should have the social media skills and budget to plan for a complete and effective social selling program. This includes sourcing, advising on, and buying the right tools and technologies, as well as delivering appropriate training. You can also take the lead in developing and communicating social selling best practices.

3. Create and manage content
Content fuels social media, and a steady stream of high-quality content is crucial to the success of any social media program or campaign. Marketing can take the lead in creating and managing content, and help salespeople share the right content at the right times.

4. Drive awareness and leads
Social selling involves salespeople engaging with customers and prospects at an early stage of the buying journey. Marketing plays an important role in generating leads through broader campaigns that target audience groups, helping salespeople connect with individual prospects as early as possible.

5. Prove social ROI
Social media marketing is much more than building awareness and generating conversation—you need to prove that social media is delivering tangible business returns. This means taking responsibility for tracking, analyzing, and reporting on social campaigns so salespeople can act quickly on insights.

8 ways the marketing team can help

- Drive the overall strategy
- Source and buy tools
- Roll out the strategy
- Set up analytics and reporting
- Communicate ongoing campaigns
- Develop best practices and processes
- Provide quality content
- Provide social media training and insights

How Hootsuite helps

Stay on brand
One of the key roles of the marketing team is to create and manage the content that fuels your social selling program. Salespeople can use Hootsuite to nurture prospects with approved content that:

- Positions your sales reps as experts
- Helps them stay on brand and compliant
- Enables them to identify buying signals
According to McKinsey, enterprises that operationalize social deliver on average 20 percent more revenue and 60 percent higher profit growth. Executive buy-in is extremely important. It increases the adoption and impact of social across an organization, helps things happen faster, and makes it easier to get more resources or budget.

1. Get your sales team onboard
One of the benefits of social selling is that it aligns marketing and sales teams more closely. This alignment improves results and creates a more seamless customer experience on social. Executive buy-in is critical to break down silos within your organization—a joint marketing and sales pitch to the C-suite will carry much more weight. The first step is to convince sales managers that social selling is the way forward so your teams can present a united front.

2. Tailor your case
Our guide Social Selling Demystified includes a wealth of insights, statistics, case studies, and other information you can use to help stakeholders understand social selling and its benefits. However, it's important to present a case tailored to your organization’s objectives, needs, and overall social strategy. This includes looking at what competitors are doing and finding specific opportunities relevant to your industry.

A number of industries are ahead of the curve when it comes to social selling, including financial services and real estate. Even if you can’t find any examples of direct competitors in your industry, share some other case studies to illustrate the potential of social selling and help bring it to life for executives. Show how you can use these proven tactics in your industry.

74% of B2B buyers
conduct more than half of their research online before talking to a salesperson.
(Source: Forrester Research)

95% of B2B buyers
chose the vendor that supplied relevant content throughout the sales process.
(Source: Ovidian)
3. Be clear about the benefits
Clearly illustrate to executives how social selling can deliver a range of benefits across the organization. You could separate benefits into marketing, sales and organization-wide. And don't forget about the benefits to the customer. Here's a snapshot of some of the main benefits of social selling:

<table>
<thead>
<tr>
<th>Marketing</th>
<th>Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Improve social ROI</td>
<td>• Break down silos</td>
</tr>
<tr>
<td>• Amplify your content</td>
<td>• Generate more revenue</td>
</tr>
<tr>
<td>• Leverage sales teams</td>
<td>• Improve customer experience</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sales</th>
<th>Customers</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Find and convert more leads</td>
<td>• Enjoy a consistent experience</td>
</tr>
<tr>
<td>• Increase LTV rates and deal sizes</td>
<td>• Make informed buying decisions</td>
</tr>
<tr>
<td>• Shorten the sales cycle</td>
<td>• Get the right solution</td>
</tr>
</tbody>
</table>

How Hootsuite helps

**Increase sales team adoption**

When it comes to getting buy-in on tools and technologies to help you manage your social selling program, you need to present a solution salespeople will actually use. Hootsuite’s range of products helps your sales team:

- Get started immediately with an easy-to-use dashboard and specialized training
- Build new social selling skills with training and resources
- Find social leads in real time based on sales territory
A key step in developing your social selling action plan is to discover how your sales team currently uses social (if at all). An audit will uncover this information. It’s also a great way to start working with the sales team on a social selling strategy, and to find candidates for a pilot rollout.

1. Audit your sales team’s social accounts and activity

Create a spreadsheet that lists all the work-focused social accounts for your sales team. You can ask them to list the accounts they use on different social networks, but it is also a good idea to do your own research to see how “findable” salespeople are on social. The aim here is to get a snapshot of your sales team’s social presence and to start assessing how they are using it—and how successfully. Capture information such as:

- Profile completeness (E.g., a good summary and a picture in LinkedIn)
- Profile effectiveness (E.g., is their LinkedIn profile just their resume or more of a content hub?)
- Brand messaging and tone alignment
- Number of friends, followers, etc.
- Brands and organizations they follow
- How active they are (E.g., average number of posts per week)
- How socially “mature” they are (E.g., do they use hashtags or follow best practices?)

2. Find salespeople doing social selling

While auditing your sales team on social, start looking for “social selling stars.” There’s a good chance one or more salespeople within your organization are already doing social selling on their own—possibly with some success. Ask for volunteers to participate in a social selling pilot, including social media training. This will help draw out salespeople already using social, as well as those interested in learning more. (Read more about rolling out a pilot later in this guide.)
3. Capture how social media is being used

The next step is to assess how salespeople are using social media. Again, you can use your social expertise to do your own review. However, you should also consider surveying salespeople to dig deeper into how they use social media on a day-to-day basis. Be clear about why you are doing the survey and how it will benefit the sales team.

**Key questions to ask include:**
- What social channels do you use?
- How much time do you spend on each social channel?
- Do you use social on mobile?
- Are your accounts personal, work-focused, or both?
- What content do you share?
- How often do you post or join conversations?
- Do you use social to research customers before meetings?
- Do you use social to find and connect with prospects?
- Do you use social to ask for referrals?
- Do you use social to research competitors?
- Do you use social to help you do your job in any other ways?
- Do you track the interactions you have with people on social?
- What tools would help you do more with social?
- How could marketing help you do more with social?

4. Audit your content

Creating and managing content is a primary role of the marketing department. During your audit, identify the types of content shared by your salespeople and look for content that gets retweeted and shared by their networks. Pay special attention to content or posts that generate conversation or engagement between a salesperson and a customer or prospect. This will help you understand the content needs of your sales team and gain insight into what is already working.

5. Audit your competitors

Don't forget your competitors. Who is the leader in this space? How active are their salespeople on social? Does it look like they have a social selling program or are individual salespeople just taking the initiative? How do their salespeople's social profiles compare to yours? What content do they share? Look for opportunities you can highlight when building your case to present to executives.
For social selling to work well, it needs to be rolled out and managed in an organized way. Your social selling action plan must align with the overall social strategy, as well as addressing its own challenges, opportunities and KPIs. It must also be scalable so new goals and tactics can be added as the program matures.

1. Define roles
Remember, social selling is a partnership between marketing and sales. Get together early in the planning process to agree who is responsible for what. For example: Who owns the strategy? Who organizes training? Whose budget do technology and social media tools come out of? Who oversees updating the CRM with social information?

2. Set goals
With roles defined, the next step is to establish objectives and set goals. As with any strategy, use the SMART framework: specific, measurable, attainable, relevant, and time-bound. As well as standard metrics such as leads generated and sales closed, additional goals for a new social selling strategy could include:

- Deliver training to [number] salespeople by [date]
- Roll out a pilot by [date]
- [Percentage] increase in sales meetings/calls by [date]

“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.”
(Source: Forrester Research)
3. Know your audience

More specifically, know your audience on social media. That means documenting which social networks they use for which purposes. In the B2B world, for example, LinkedIn is often an important channel. B2C may be more about Facebook and Twitter. Understanding how your customers use social will let you create a strategy for salespeople to contact them through the right social network at the right time.

4. Measure performance

You need to measure your social selling program to be able to improve it over time and prove social ROI. As your social selling program matures, you can look for specific things at each stage. For example, at the start you can measure overall program adoption and whether or not salespeople are gaining new followers. When the program has matured, you can track individual sales rep performance, looking at how many deals are being closed and identifying top performers.

5. Develop processes and guidelines

Your social strategy should include best practices, which will evolve as the program matures. For example, you may need different tone of voice guidelines for content to be shared at different stages of the buying journey. You will also need reporting processes and specific guidelines for salespeople using social media. Ideally, you should aim to create a playbook that documents what should happen at every stage of the social selling process. A pilot can help you develop a playbook of best practices.

How Hootsuite helps

Prove social ROI
Hootsuite’s analytics products help you prove the ROI of your social selling strategy. You can:
- Track social as a lead source
- Measure the success of individual sales reps
- Prove the effectiveness of social selling

Manage risk
Whenever you expand your social media strategy beyond the marketing department, it’s vital to ensure you take steps to protect your brand, manage risk and stay compliant. Hootsuite can help you:
- Manage platform access for sales reps
- Set publishing permissions
- Build publishing approval processes and content libraries
Roll out a pilot

A pilot program is a good way to demonstrate the success of social selling, test important elements such as training and content, and refine your final strategy before rolling it out to the full sales team. Your pilot needs a defined audience, specific objectives and goals, and a test group of participants.

1. Identify participants
Use your audit to identify any salespeople who might already be doing social selling on their own. Look for a mix of participants including non-digital natives (i.e., older salespeople who may not have grown up with digital tools) as well as people who are already comfortable with social media. The process of recruiting volunteers for your pilot is a good first step toward engaging the broader sales team in a social selling program.

2. Create a training plan
Social media training is key to the success of your social selling program, and is usually part of marketing’s remit. The minimum aim of the training is to ensure that all salespeople have the same basic level of social media skills. However, you should ideally offer a range of courses from basic social media skills to advanced social selling. Your pilot can help you refine your training strategy.

3. Develop a playbook
You should aim to develop a social selling playbook that your sales team can look to as a source of best practices. During the pilot program, encourage participants to take screenshots of LinkedIn InMails, customer email exchanges, social media posts, and other communications that detail the conversations salespeople have. This can help you formulate social selling best practices by leveraging the successful patterns of top salespeople.

4. Assess performance
Measure what worked in the pilot and what didn’t to identify areas that can be improved. As well as looking at specific performance metrics, survey participants (anonymously if necessary) to get honest feedback on processes, training and overall collaboration between marketing and sales. Record and analyze your successes and failures, and then adjust your social selling strategy in response.

How Hootsuite helps
Deliver targeted training
Get your people working smarter with Hootsuite Academy, our online education hub that offers courses and certifications created with industry experts. You can tap into our social media expertise to improve overall social media skills across the organization and enroll your team in courses specific to social selling. Because every organization is different, this includes:

- Targeted, on-site, in-person training
- Live, web-based training
- Self-guided online training
Scaling your plan takes the kind of budget and cross-departmental cooperation that can usually only come with C-suite backing. However, the Altimeter Group found that “only 52% of companies say that executives are informed, engaged, and aligned with their company’s social strategy.” This reinforces how important it is to get the executive buy-in we covered earlier in this guide.

1. **Align your plan to business goals**
   Identify the organization's key business goals and pick the top few to focus on from a social selling perspective. This will help you demonstrate value of social selling and gain the ongoing executive buy-in you need to adopt social selling across the organization.

2. **Develop further training**
   Your pilot will help you identify social media knowledge and skills gaps within your sales team. Refine your training materials and playbook and update them to address the training needs of salespeople with different skill levels and experience using social media. Actively promote the benefits of training to encourage participation. Social selling is a growing area that all salespeople can benefit from mastering to help them in their current role—and their future career.

3. **Adopt scalable technologies**
   Part of marketing’s role is to source and purchase social media tools and technologies to help streamline processes, analyze performance, ensure compliance, and much more. Social selling requires an integrated technology solution that integrates with your CRM platform and other systems.

   “Hootsuite gives us the confidence to empower our advisors to be active on social media knowing that the software takes care of any compliance and regulatory concerns.”
   - Stuart Raftus, president of Canaccord Genuity Wealth Management Canada

4. **Communicate successes**
   Don’t just send an automated report every so often showing key metrics. Seek out and share stories that show social selling in action within your organization. Demonstrating the benefits to customers, salespeople, and the organization will help you increase adoption and engagement—and get more budget to expand and improve your social selling program.

---

**How Hootsuite helps**

**Integrate social with tools you already use**
Hootsuite’s open ecosystem features over 250 business applications and integrations, which means your sales team can easily integrate social with existing CRM systems like Salesforce, SugarCRM, Nimble, LeadSift, and more.
Success stories

NFU Mutual: Moving social beyond the marketing department

UK financial services company NFU Mutual enabled individual salespeople to reach new leads, build trust and relationships with their audience—and convert them into customers. After choosing Hootsuite as their organization-wide social selling solution, the company empowered their individual branches and identified influencers and branch champions to deliver a consistent approach to training, service, and tone of voice.

NFU Mutual’s success already depended on trust and strong relationships. By embracing social as a whole, they have been able to continue with that same ethos online, forging new relationships with customers that they may not have been able to reach otherwise.

Purdue University: Raising $13m in one day

Purdue University’s challenge was to expand into new, younger markets to engage a future generation of donors. The university launched “Purdue Day of Giving” with two branded campaign hashtags (#IGave and #PurdueDayofGiving). They then leveraged real-time data from Hootsuite Insights to engage, source content, pull sentiment analysis, and create geo-targeted reports.

In parallel with on-campus events, their aim was to activate a community of young alumni on social and use data to understand how to reach them. The campaign raised $13M in a single day with the help of social.

Avidia Bank: Increasing mobile account sign ups

Avidia Bank turned to social media as a key part of their innovative launch strategy for their new mobile banking app, Cardless Cash—generating early excitement and downloads. By combining Periscope, influencer marketing, and their own employee advocacy program, Avidia drove a 13% boost in app enrollments.

With the help of Hootsuite, the Avidia team identified and engaged with social media influencers in financial services, monitored campaign hashtag #CardlessCash, and engaged in relevant conversations with customers. Hootsuite Academy trained their internal employee advocates to pull on-brand content from a central content library and share on their personal channels.
Hootsuite is the most widely used platform for managing social media, loved by over 15 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 250+ 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.

Speak to an expert today by visiting enterprise.hootsuite.com