LinkedIn Sales Solutions

# 6 Steps to Accelerate Social Media Success

# Introduction

Collectively, today's B2B decision makers own the majority of the buying journey. Buyers show strong preferences for online education, and brands cater to these preferences by providing helpful content and interaction opportunities on websites, blogs, and social media channels.

High-performing organizations have identified this as a growing trend. With less direct influence in the buyer's decision making process, it's important to be ever-present in their journey.

Social media practices allow financial organizations to have an always-on strategy. Twice as many B2B customers use LinkedIn to *research purchasing decisions* than any other social network. Revenue producers, agents and advisors who successfully adopt social media tools have been shown to earn 45% more opportunities per quarter and are 51% more likely to make quota.

This 6-step social media success kit will help members of the organization understand how they can build a rock-solid model in six steps that will lead to social media success in the coming year.

**In this eBook, we highlight:**

- How to Set up a Social Media Foundation
- 4 Pillars of Social Media
- Measurement and Optimization

## Revenue Producers

**Revenue producers use LinkedIn for three reasons:**

- To establish credibility
- To maintain relationships with their network
- To build connections with potential customers

## Department Leaders

**Department leaders use LinkedIn for three reasons:**

- To evaluate how individual revenue producers are reaching out to potential clients
- To amplify their team's performance by urging adoption of best practices
- To position their producers and

## Marketers

**Marketers can support social media strategy on LinkedIn by**

- Understanding the team's social media process
- Distributing content to active user groups
- Qualifying leads with personalized messaging

6 Steps to Accelerate Social Media Success in 2015

# Revenue Producers

## STEP 1

# Set Up Your Foundation

A solid LinkedIn foundation begins with your profile. Research has found that ***49% of potential clients research producers, agents and advisors*** through their LinkedIn profile, and ***50% will avoid professionals*** with incomplete profiles.

### LinkedIn Profile

The key to a successful LinkedIn profile is to immediately make a positive impression. Does your profile scream "Me, me, me!" like a resume, or does it convey the advantages one might receive when working with you?

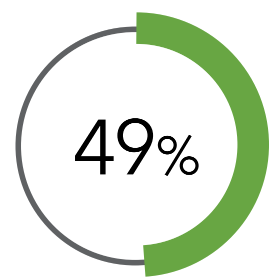
**Get started by completing the following LinkedIn profile essentials:**

- Profile Picture: Add a photo to your profile. Our research shows that a friendly and professional profile picture helps social revenue producers achieve a 40% higher InMail response rate.
- Headline: Write a descriptive headline that includes relevant topics and keywords. Stay focused on your areas of expertise and the benefits you can bring to potential customers. Keep in mind, you have 120 characters.
- Custom URL: Customizing your URL makes it easier for prospects to find you and reinforces your personal brand.
- Summary: Keep it short, engaging, and focused on successes you have achieved, both with customers and personally in your professional roles.
- Experience: Add the key positions you have held throughout your career. Briefly explain your responsibilities and results you helped the organization -- or customers -- achieve within each.

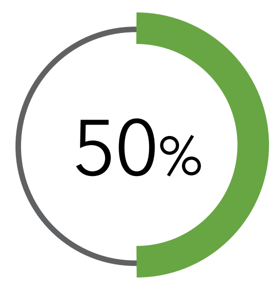
While this is a good start, continue to reach for "All-Star" profile status by joining groups, adding skills, asking for recommendations, and adding projects or documents.

*Quick Tip:*
*Turn off notifications when making major changes to your profile to avoid overwhelming your network with updates.*

49% of buyers research vendors through their LinkedIn profile




50% will avoid producers with incomplete profiles



## STEP 1

# Set Up Your Foundation

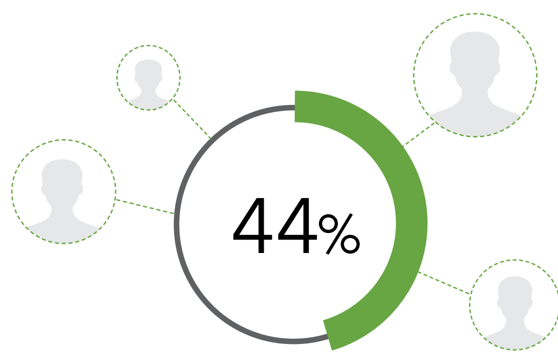
### Build Your Network

Once your profile communicates the value you bring to buyers, it's time to start building your professional network. It's no secret that a big network helps when trying to connect with prospects. In fact, 44% of social buyers use shared connections on LinkedIn to find potential vendors.

**Form your network by:**

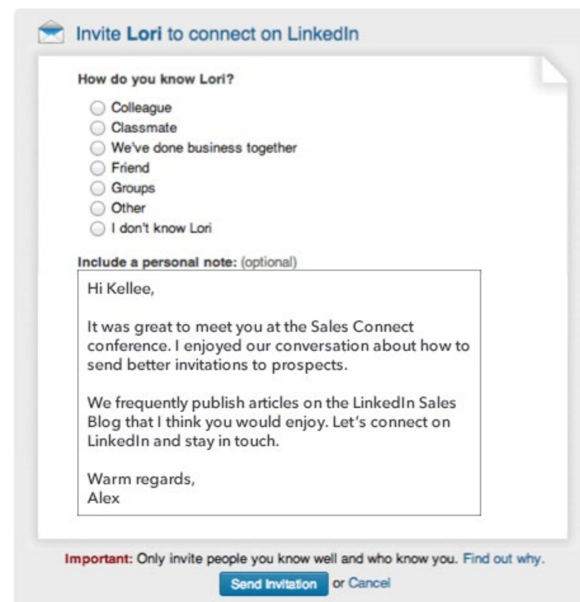
- Building Your Base with Co-Workers and Friends
  Personal and workplace connections are the perfect foundation for your LinkedIn network. Your co-workers can help you establish credibility through recommendations, and your personal connections may be a link to high-value prospects. To invite people you know well to connect, visit the Add Connections page and link your email account to LinkedIn. You'll be able to see the people you know who already have a profile and easily send them an invitation.

- Adding Clients and Potential Clients
  While you will see the profiles of clients and potential clients in the Add Connection tool, we recommend personalizing invitations to high-value connections. Think of your invitation as a way to advance your relationship with this client or potential client.




of social clients use shared connections on LinkedIn to find potential vendors

*Quick Tip:*
*Encourage others to connect with you by adding your LinkedIn profile URL to your email signature.*



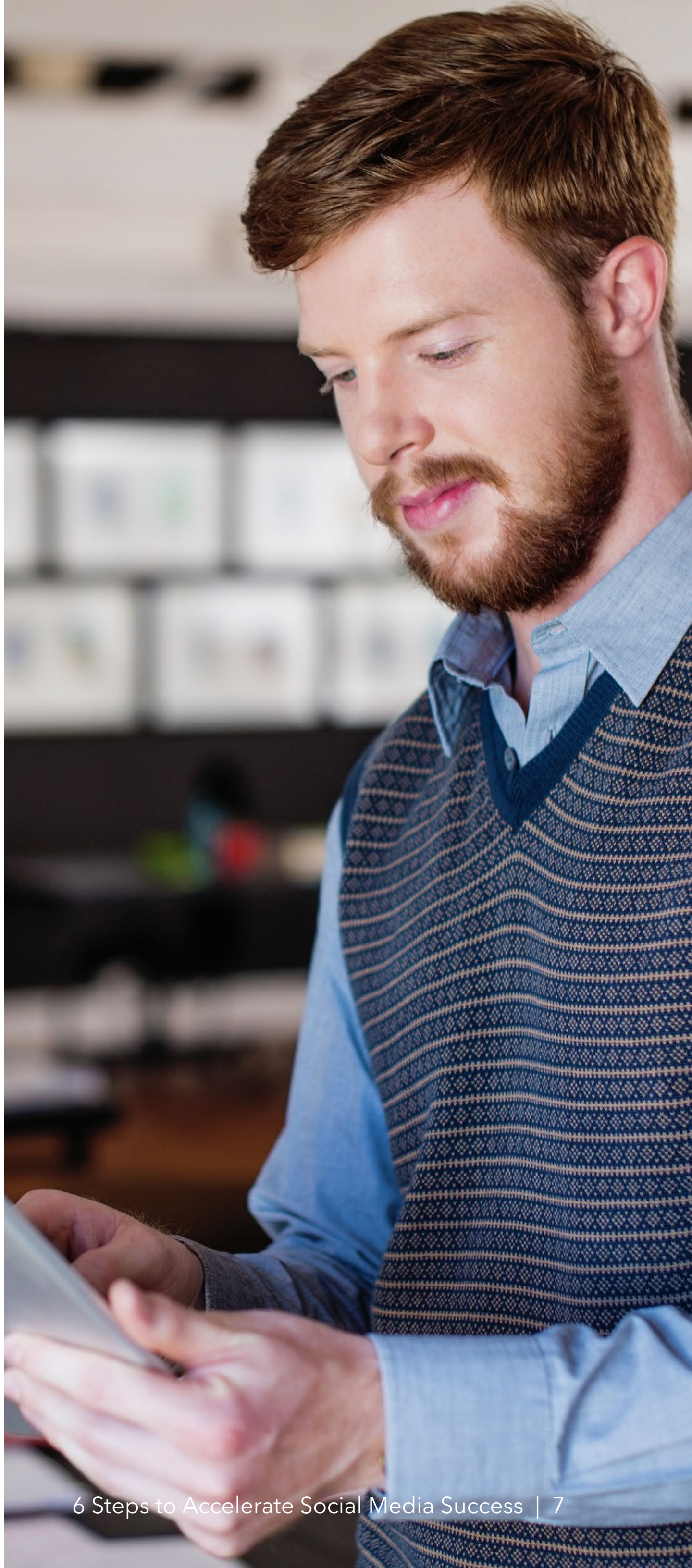
**STEP 1**

# Set Up Your Foundation

## Get Familiar with LinkedIn

After establishing a network, it is important to keep yourself top of mind with your prospects and clients. That doesn't mean a continuous correspondence of emails, but to stay active on the LinkedIn platform. Some key LinkedIn features that will help you with this include:

- LinkedIn Pulse features recent and top articles posted on the LinkedIn publishing platform. You can see articles posted by your network as well as posts in categories ranging from Social Media Strategies to Leadership & Management.
- LinkedIn Groups are online forums for professionals with similar interests to share content, find answers to their questions, and make business connections. Find Groups to join by looking on your prospects' profiles to see the Groups they participate in or by using the search bar at the top of your homepage. LinkedIn will also suggest Groups that may fit your interests.
- LinkedIn Publishing Platform gives you the ability to publish long-form posts about your expertise and interests. Posts published on this platform lead to professional credibility since they are featured on your profile. Articles may also appear on LinkedIn Pulse.
- "People You May Know" suggests LinkedIn members you may want to connect with based on common connections or similar profile information (such as educational background, company or industry).
- "Who's Viewed Your Profile" gives you insights about the LinkedIn members who have viewed your profile in the last 90 days.



## STEP 2

# Create a Professional Brand

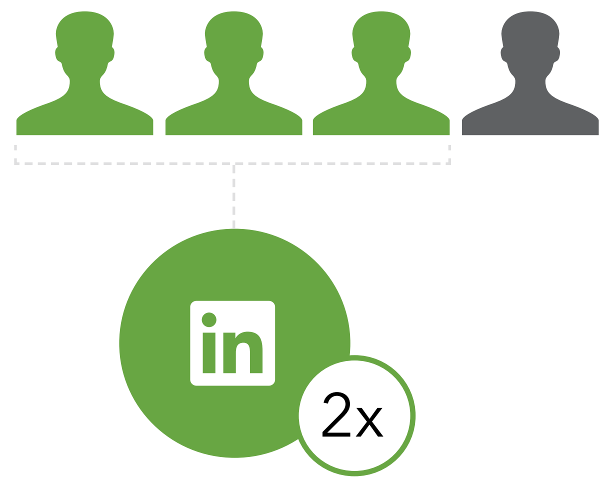
Now that you've established the foundation of your LinkedIn presence, focus on finding opportunities to showcase the value you can provide to prospects and customers. This is important because three-fourths of B2B buyers now use social media to research purchasing decisions, with twice as many using LinkedIn as any other social network.

**Here's how to demonstrate your expertise on your LinkedIn profile:**

- LinkedIn lets you Add Links and Upload Files in your Experience section. Help your prospects make buying decisions by featuring case studies, white papers, rich media (such as the video your marketing department created based on a recent customer success), and top-notch, educational blog posts.
- Ask current and past clients for Recommendations should your role allow it under SEC regulations. A good recommendation describes how you worked together and gives specific examples of how a client benefited from working with you. Make sure to write a personal message in addition to the official recommendation request.

3/4

Three-fourths of B2B buyers now use social media to research purchasing decisions.




Twice as many B2B buyers are using LinkedIn as any other social network.

## STEP 2

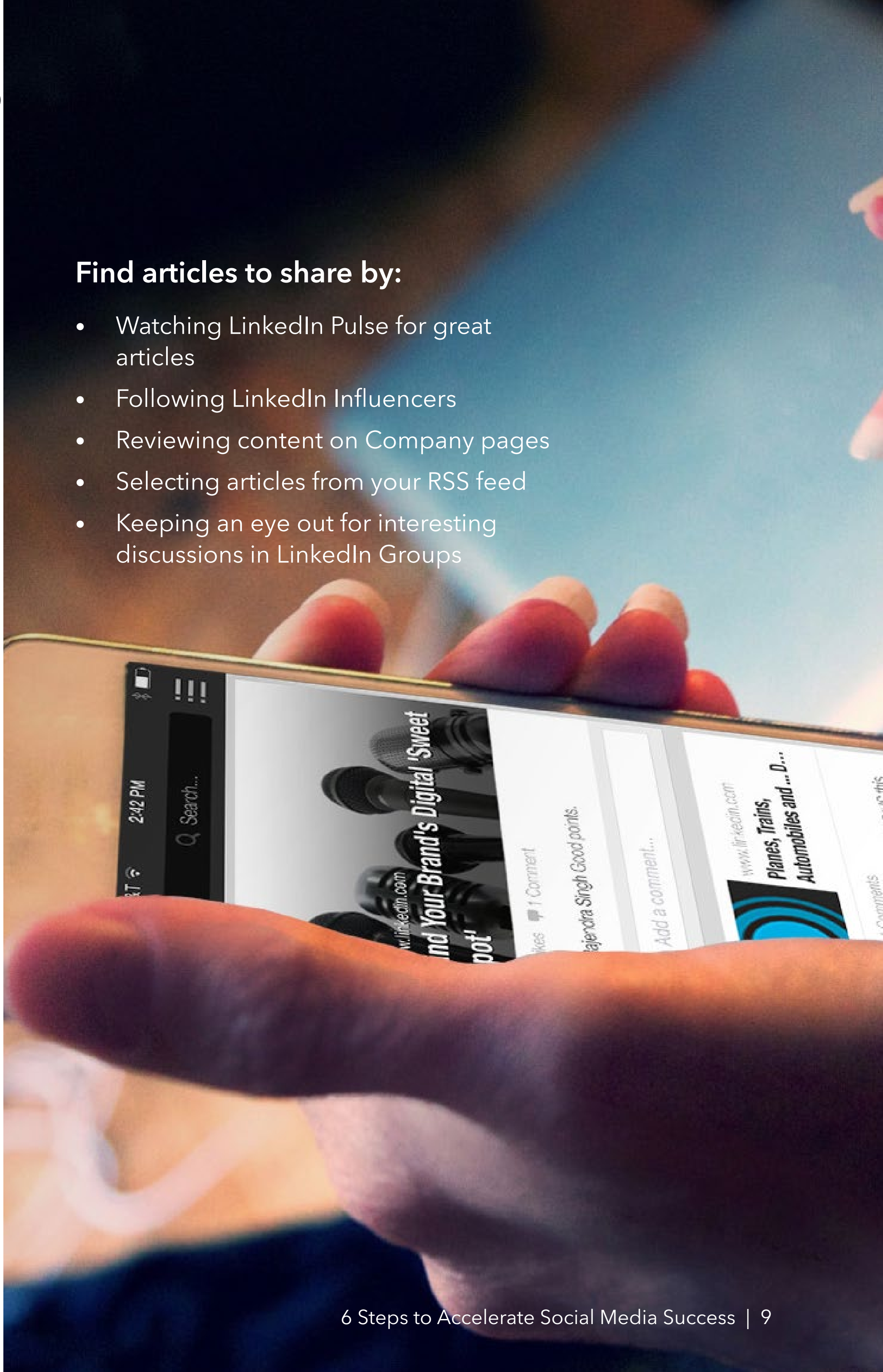
# Create a Professional Brand

### Attract Prospects

Once your profile is optimized, you'll want to give your prospects and clients a reason to visit.

Leverage LinkedIn's Feed to enhance your professional brand by sharing content that your industry (especially prospects) will find interesting. This not only demonstrates that you stay current with industry news, it enhances your visibility on LinkedIn.

To have the articles you share appear on your contacts'LinkedIn Feed, go to your **Home** page and post the URL in the "Share an update" field.  Make sure to write a sentence or two about why your contacts should read it. This not only helps your prospects determine if the article will help them with their buying decisions, it demonstrates your knowledge of the field.



**Find articles to share by:**

- Watching LinkedIn Pulse for great articles
- Following LinkedIn Influencers
- Reviewing content on Company pages
- Selecting articles from your RSS feed
- Keeping an eye out for interesting discussions in LinkedIn Groups

## STEP 3

# Find the Right People

Use Search on LinkedIn to find professionals within your target market.

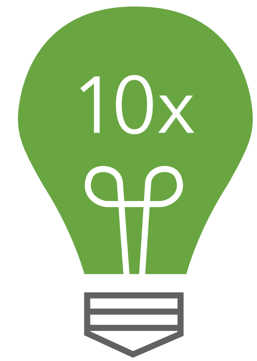
**You can identify these professionals in three ways:**

- By Industry–Since these are fairly generic classifications, see what industry classification your clients put on their profiles.
- By Company–You can search by keyword, but company names will also be indexed if they have created a Company Page.
- By Location–LinkedIn has defined locations that can be indexed for easy search filtering.

**If you have a Premium account, you can also:**

- Set up additional filters through Premium Search to identify the best prospects.
- Get customized recommendations based on your past searches through Lead Builder.
- View the profiles of third degree connections through Extended Network Visibility.

Consider also monitoring your connections for "trigger events" to help you identify new sales prospects who are currently in the market for your product or service. Examples of trigger events may include changes at your prospects' company, product launches, or when a connection gets a promotion or new job. These are all specific times when prospects are more open to hearing from producers, agents and advisors.




*Look for recent additions to your target companies. Newly hired decision makers are up to 10 times more likely to make a purchase than established ones.*

## STEP 4

# Engage Prospects with Insights

Nearly 64% of B2B buyers report that they appreciate hearing from a vendor who provides knowledge or insight about their business. Take advantage of this to get your foot in the door with new prospects, and to develop relationships with existing LinkedIn connections.

When you look for content to share with your prospects, focus on providing insights that will help them make more informed decisions about the challenges they face in their industry.

The content you share should include:

### Relevant Industry News

Help your prospects stay up-to-date on their industry by sharing reports and relevant statistics.

**Leverage industry data and news on LinkedIn by:**

- Sharing links to interesting industry reports in your Status Updates.
- Including data and statistics when commenting on prospects' Status Updates or in LinkedIn Group discussions.
- If you have a Premium account, leverage industry insights when you reach out to new prospects with InMails.

### Timely Content

To find opportunities on LinkedIn to reach out to your prospects with timely insights, watch your LinkedIn Feed to see when your connections change jobs, announce company news, or post Status Updates that indicate they have started researching buyers.

**Before you reach out to each prospect, view their LinkedIn profile and ask these questions:**

- How do they talk about their job and responsibilities?
- What kind of content do they share or publish about?
- What kind of groups do they belong to?
- What discussions do they engage in?

## STEP 5

# Build Strong Relationships

**There are two key aspects to building a relationship with prospects:**

- Staying up-to-date with important contacts and companies
- Focusing on providing pleasant experiences that help those you work with meet their goals

**The most effective social media users use the following tactics to strengthen relationships with their prospects:**

- Engaging in Discussions in LinkedIn Groups and offering to be a resource for the person asking the question.
- Sharing resources that help prospects solve a pain point or gain the information they need to make an informed decision
- Helping prospects by sharing their Updates or posts they've published
- Introducing two connections who can mutually benefit from meeting each other

By using these proactive tactics, you may not need to wait for trigger events. Your activity will encourage your prospects to keep your services top-of-mind during their decision making process.

> *"Have a more focused sales strategy—who am I selling what to whom—with the right measurements to know if we're on track."*
>
> *—Michael Morgan, Intergen*

## STEP 6

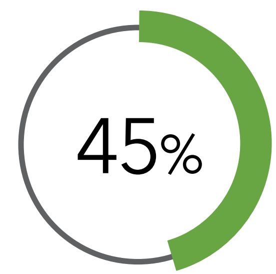
# Measure and Optimize Your Social Selling on LinkedIn

Top social media strategists on LinkedIn can increase revenue producing opportunities by up to 45% and are more likely to attain their goals than other producers. But success doesn't happen overnight.

When you start your social media strategy on LinkedIn, stay motivated by tracking your effort and results.

The following metrics can help you see how your actions lead to a better, more engaged network:

- Who's Viewed Your Profile, which reveals:
  - Profile views–The number of people who have viewed your LinkedIn profile in the last 90 days.
  - Search results–The number of people who found your LinkedIn profile via search (LinkedIn and Google) in the last 90 days.
- The number of Connections you have.
- Your Social Selling Index (SSI), which is a score from 1–100 that rates your social media effectiveness. (Only for social media users at companies of over 100 employees.)
- With a Premium account, you can also track:
  - Current contact count–The number of 1st-level, 2nd-level and 3rd-level LinkedIn connections you have today.
  - Average message and update views–The average number of people who view your updates. You can access total views for your last 14 updates.
  - Average connection requests–The number of connection requests you receive over a specific period of time.




Top social vendors on LinkedIn can increase opportunities by up to 45%

## STEP 6

# Measure and Optimize Your Social Selling on LinkedIn

In addition to the metrics on the previous page, consider also tracking how you use LinkedIn. This will help see the relationship between your social media efforts and results.

**Pay attention to:**

- How many new connections are you making daily/weekly?
- How much content are you sharing daily/weekly?
- How much time is spent prospecting on LinkedIn?
- How often are you reaching out to clients/referrers?
- How often are you communicating with each prospect?

Once you start tracking how you use LinkedIn, you can experiment to see what works best to engage prospects in your industry.

Make sure you commit to an experiment long enough to see results.
For example, if "Who's Viewed Your Profile?" is one of the metrics you use, commit to an action for at least a week to see the percentage change in profile views from the previous week.

**Questions you can investigate include:**

- How does the amount of content you share correspond to the number of people viewing your profile?
- How many referrals turn into new connections and leads?
- What are the most effective ways of reaching out to new prospects? Or to existing connections?

*Quick Tip:*
*Track your efforts and results to see how your actions lead to a better, more engaged network*

6 Steps to Accelerate Social Media Success in 2015

# Department Leaders

## STEP 1

# Set Up Your Foundation

The rise of social media has changed the role of department leaders. The most successful social media users share resources and contacts, and prioritize achieving organizational goals over individual ones.

**When teams work together, they magnify their effort. Individual revenue producers:**

- Have access to a wider network.
- Benefit from the increased visibility of the brand.
- Collectively create more resources to share with their prospects.

As a department leader, your challenge is to guide and motivate your team as they become savvy social media users. The first step is to model best practices. If you are new to LinkedIn, read through the Sales Rep Profile Development process earlier in this eBook. Your team will look to your social presence as a guide, so make sure you have an All -Star profile.

The next step is to identify all the potential pain points that might prevent teams from throwing themselves into social media strategy on LinkedIn.

**Questions to identify factors that might stand in the way of adoption by your revenue producers:**

- What pressures are producers under already?
- Are their prospects active on social media?
- Will your producers face a technology barrier or social media learning curve?

**You will also want to investigate:**

- Does your company already have branded content to leverage on social?
- Do you have  social guidelines in place?

**Best-in-Class Profile Checklist:**

- ☑ Does your profile read more like a case for your product and service than a resume?
- ☑ Is your profile optimized and specific to the industry you serve?
- ☑ Do you use keywords specific to your industry within your profile so potential customers and partners can find you through search?

## STEP 1
# Set Up Your Foundation

After identifying organizational barriers, it's important to figure out how to encourage your revenue producers to invest in social media.

## Rethink Benchmarks

If your team continues to be evaluated on the same benchmarks as before, they will initially resist any new initiatives that pull them away from their normal activities. But just like any revenue producing activity, social media strategy takes time to gain momentum.

**Jump-start your team's social media initiative by setting benchmarks:**

- How much time should they invest in social versus traditional outreach ?
- How many InMails should they send? How should it compare to emails?
- New Connections vs. leads obtained?
- How many introductions and recommendations should they ask for?
- How much content should they share each week?

## Sell Social Media to the Team

The next step is to introduce social media to your producers, agents and advisors. By communicating the value of social media to your team and helping them get started, you will get more buy-in than if you just tell them to use LinkedIn.

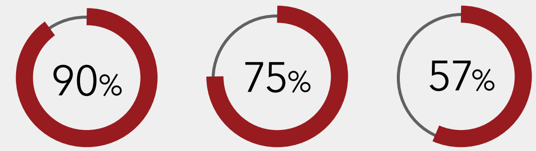
**Questions to answer:**

- How will social media help the team achieve their goals?
- How will social media benefit the entire team?
- How should producers get started with social media strategy on LinkedIn?
- What support will the team  receive as they start social media strategy?

Think through how you will present social media use to the team. The key is to present it as an activity that will help them improve..

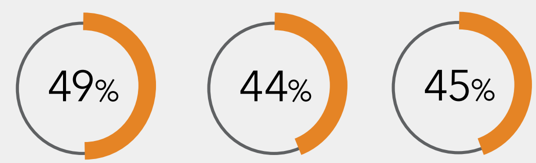
## Social Media Value Proposition

Why Social Media?




- 90% of decision makers never answer a cold call.
- 75% of B2B buyers use social media in their decision process.
- B2B buyers are typically 57% of the way though their buying decision before they reach out to sales reps.

Why LinkedIn?




- 49% of buyers research vendors through their LinkedIn profiles.
- 44% of buyers find potential venders through shared LinkedIn connections.
- Top social sellers have 45% more opportunities per quarter and are 51% more likely to make quota than sales reps who do not effectively leverage LinkedIn.

## STEP 2

# Create a Professional Brand

LinkedIn's research reveals that 92% of B2B buyers will engage with revenue producers who are known industry thought leaders. That's over 5 times more effective than when a producer reaches out cold.

6 Steps to Accelerate Social Media Success in 2015 for Revenue Producers covered the basics of setting up a professional brand on LinkedIn. Help your producers fill out their profile by providing marketing-approved resources such as case studies or white papers that they can upload to their profile, as well as encouraging them to ask their clients for recommendations.

**The next step is to create thought leaders on your team. All producers should:**

- Comment in LinkedIn Group Discussions.
- Share important Industry news on their LinkedIn profile.
- Ask their clients for recommendations.

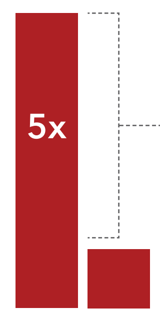
In order to have a truly successful social media team, however, producers, agents and advisors need to publish expert content. Thought leaders open doors for the entire team. They form connections with senior decision makers, create resources the entire team can send to prospects, and attract prospects who are searching for information.

**LinkedIn provides three ways for members to publish expert content:**

- Publish long-form content on the LinkedIn publishing platform.
- Upload articles to your profile as PDFs.
- Link to SlideShare presentations.

As a department leader, you should lead by example and become one of the main experts at your company. But if other producers want to publish, encourage them. The more content your team creates, the more opportunities they will have to connect with prospects.

*Quick Tip:*
*Ask your marketing team to work with producers, agents and advisors to co-create thought leadership content such as interviews, articles, SlideShare presentations and white papers.*




B2B customers are **5x** more likely to engage with financial professionals who are known industry thought leaders.

## STEP 3

# Find the Right People

LinkedIn's research has shown that revenue producers focused on new business who exceed their goals make 148% more connection requests each month than other producers. But it's not enough to urge your team to make new connections, they need to be connecting with high-potential prospects.

**Help your producers, agents and advisors find high-level prospects on LinkedIn by answering the following questions:**

- What industries should your team focus on?
- What regions are most important?
- What types and sizes of companies are prime targets?
- What job titles should producers focus on?

Make sure you communicate to your team how important it is to continuously expand their network. LinkedIn members with Basic accounts are able to view the full names of their first and second-level connections. Premium account members can also view the profiles of third-degree connections.

You should also urge your team to join LinkedIn Groups to discover new prospects. Producers are 70% more likely to get an appointment from a cold connection request if they cite a common LinkedIn Group.

**LinkedIn Groups also give revenue producers the ability to:**

- View the names and profiles of other members, regardless of level of connection
- Build connections with prospects when they ask questions
- Send InMails to fellow Group members who have allowed that function

> *Quick Tip:*
> *Make sure your entire team is connected to each other on LinkedIn. This expands the leads that each producer will be able to see when they search.*

As a department leader, you should also keep an eye out for "trigger events" in your industry or at target accounts. Product launches, acquisitions, regulatory changes, or hiring sprees all signal times when prospects are more open to hearing from vendors. Alert your team any time you see a trigger event that they should take advantage of.

## STEP 4

# Engage Prospects with Insights

Industry insights open doors in social media. Producers, agents and advisors who reach out to prospects with relevant insights about their business are nearly five times more likely to get a response than those who reach out cold.

In addition, six out of ten B2B buyers report that they chose the vendor who provided the best mix of content for each stage of their purchasing process.

As a department leader, your role is to be the link between the producers and your company's  marketing team.

**To identify the insights that will help your team build relationships with prospects, ask revenue producers:**

- What questions do your potential customers continuously ask you?
- What types of content gets the best results when you reach out to prospects?
- What industry insights do you share with your prospects?

**Work with the Marketing team to identify:**

- What kind of content can we create to answer commonly-asked buyer questions?
- How can we make it easier for producers to reach out with industry insights?
- How can we extract and use the expertise of our internal experts?
- How can we expand the reach of the thought leadership content we create?

> *"Post great articles, research more accounts for warm referrals, ask for referrals everyday. Help others in your network."*
>
> *—Casey Van Even, Discovia*

## STEP 5

# Build Strong Relationships

LinkedIn helps your team build relationships with prospects by finding opportunities to reach out. Revenue producers can see when their prospects:

- Change jobs or have work anniversaries
- Post status updates and articles on post on LinkedIn
- Comment on status updates
- Engage in discussions in LinkedIn Groups
- Make new connections

Our research shows that producers who exceed their goals engage on LinkedIn with their prospects 39% more than other vendors. This means that they're liking, commenting, and re-sharing the content that their prospects post and share on LinkedIn.

It's easy for producers to put those activities on the backburner when things get busy though. So make sure that you are continually encouraging the team to spend time engaging with their network.

You should also encourage the team to conduct other activities that strengthen their relationships with prospects. Those include:

- Engaging in Discussions in LinkedIn Groups and offering to be a resource for the person asking the question.
- Sharing resources to help prospects solve a pain point or gain the information to make an informed decision.
- Introducing two connections who can mutually benefit from meeting each other.

By pushing your team to be proactive about reaching out to their LinkedIn, you'll help them build relationships and stay top-of-mind with their prospects.


Producers who exceed their goals engage on LinkedIn with their prospects **39% more** than other vendors.

## STEP 6

# Measure and Optimize Your Team's Social Media Strategy on LinkedIn

As your team dives into social media, you'll want to track their results to ensure they're using LinkedIn effectively. The questions you want to ask are:

**Are your revenue producers becoming more efficient?**

- How much time are they spending to gain leads?
- What is their close rate?
- What is the adoption rate of social media by your team?
- How long is it taking for producers to dive into social media on LinkedIn?
- What is their feedback?

**Here are some metrics to help you understand how your team is using LinkedIn:**

- How many Connections each producer has
- How many connection requests each producer sends and receives
- How much time the team spends engaging with prospects through likes, comments and group discussions
- How much time do revenue producers spend prospecting on LinkedIn?
- How much content is the team sharing and publishing themselves on LinkedIn?

Optimize Social Media Strategy

## STEP 6

# Measure and Optimize Your Team's Social Media Strategy on LinkedIn

As your team dives into using LinkedIn, your goal as a department leader should be to identify best practices to disseminate to the entire team.

**To find what works best to engage prospects in your target industries, ask:**

- Which producers, agents and advisors are most successful at social media strategy? What are they doing that others aren't?
- What has your team found are the most effective ways of reaching out to new prospects? Or to existing connections?
- Which types of leads respond best to social media strategy on LinkedIn?

**Make sure you also track the resources you provide to your team to help them connect with prospects:**

- How often are you distributing thought leadership content?
- How is it being consumed by your audience?
- How are you alerting the team to insights and other resources they can send to prospects?

**Finally, continually evaluate yourself as a social media leader:**

- How are you leading by example on LinkedIn?
- What thought leadership activities are you executing?
- Are other professionals in your industry recognizing your thought leadership?

Identify best practices to disseminate to the entire team.

6 Steps to Accelerate Social Media Success in 2015

# Marketers

## STEP 1
# Set Up Your Foundation

As part of a marketing team, you have the daunting task of implementing marketing efforts that support revenue producers' lead generation. You have the ability to be the bridge between producers and marketing and to ensure their goals are aligned.

One of the best ways to ensure you're meeting the team's expectations is to know their social media process and overall social media best practices.

Whether you are client-facing or not, you should optimize your profile just as producers do.

Your prospects might be searching for you, Use "Who's Viewed Your Profile".

### Identify a clear lead transition

Knowing the proper time to transition leads to your "sales" team can be just as important as generating the lead This may vary depending on your organization. But according to the Annuitas B2B Survey, 41.5% pass leads to revenue producers once they are qualified by the inside lead development team.

Not nurturing long enough can lead to a hard sell or can take too long, and the prospect may not feel their needs are being met. Knowing where in the process to transition will create an efficient closing process for your revenue producers. Consider putting a service level agreement together between producers and marketing to ensure qualified leads don't fall through the cracks without a follow-up.

### Optimize your Inbound Marketing Efforts for LinkedIn

If you are part of a marketing team, you have some sort of inbound marketing efforts happening. Most likely you have a multi-channel approach in place, because

> *If you are new to LinkedIn, follow the foundation setup in the Revenue Producer section of this eBook.*

not all customers buy in the same way. But whether you have three or thirteen, it is important to coordinate your distribution of this marketing content to your prospects at the appropriate time on LinkedIn.

### Align your KPIs with Revenue Producers

Collaborate with revenue producers to have coordinated KPIs. Having different goals can lead to an inefficient process and low closing rates. The Annuitas Survey found that only 29% of companies surveyed had common KPIs for their Revenue Producers and Marketing Teams.

## STEP 2
# Create a Professional Brand

It is important to create a professional brand for yourself through your personal LinkedIn Profile. You may have a public-facing portion of your process that your profile can help to create an instant sense of credibility during your outreach. But as a marketer, you may also be tasked with creating a professional brand on your LinkedIn company page.

As you put together a content strategy for your LinkedIn Company page, consider writing a revenue producer playbook for your team. If you have a cadence or schedule to the content you distribute on your company page, make sure the team is aware and knows how to properly distribute that messaging to their connections.

Coordinate the branding on your LinkedIn Company page to match or look similar to the branding on other social sites, your website and inbound marketing collateral. This will ensure that your prospects have a consistent brand experience in your multi-channel marketing plan.

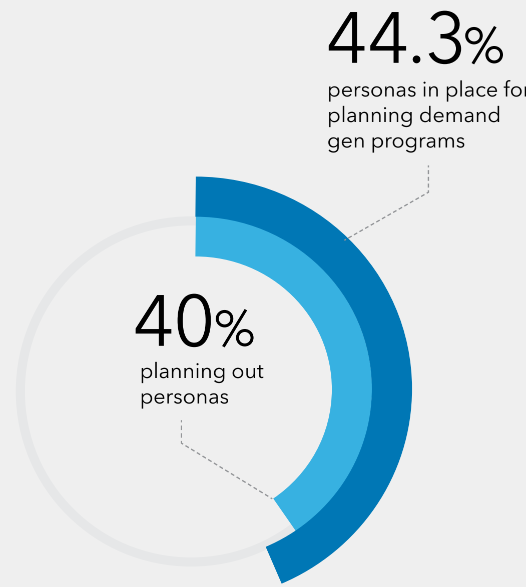
## STEP 3

# Find the Right People

Identify LinkedIn Groups and Professionals to target. Qualify these groups of professionals by industry and by how active they are on their profile and/or groups. You can then relay these niche communities or targeted professionals to your account relationship team or other inside development professionals.

If your company has just started a Company Page or LinkedIn Group community, consider finding your target users by researching your competitors. Research their company pages and see where their marketing and revenue producer representatives are interacting on LinkedIn. Most likely, the communities they are engaged with will also include your prospects.

If you know your prospect's industry and professional level, you can do a targeted search through LinkedIn's database. These are important factors in developing your buyer's persona. Creating a persona for your target audience can help develop a focus on the prospect's buying journey. So once you identify a prospect, not only will you be able to match them to a persona, you'll also be able to predict what their buying journey will entail. This leads to a better understanding of how to initiate a conversation on LinkedIn.




According to the Annuitas B2B Demand Gen Survey, only **44.3% of companies had personas in place for planning marketing programs**. Yet, almost **40% were planning out personas** -- a clear indication that a majority of organizations have personas as a consideration in planning but are not focusing on buyer-centric programs.

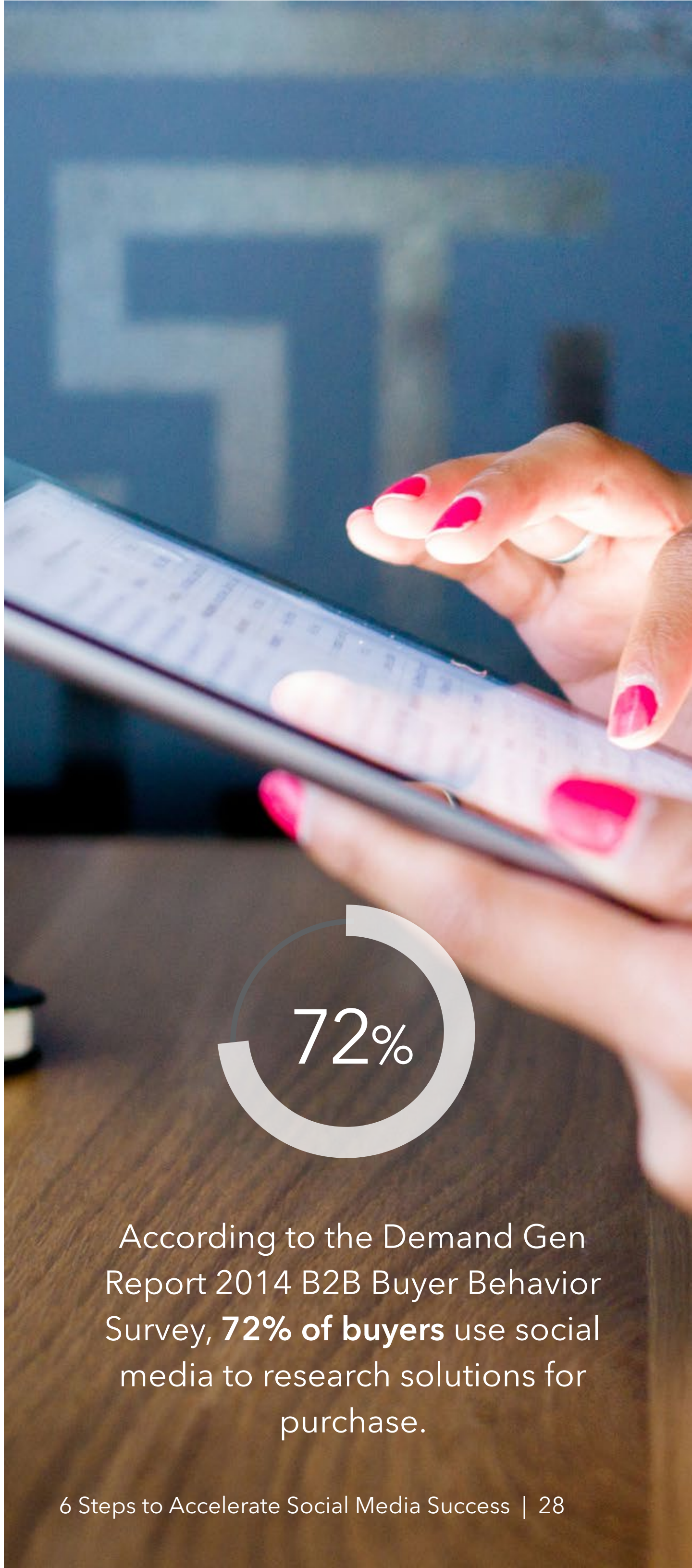
## STEP 4
# Engage Prospects with Insights

Use your social communities to engage with targeted audiences responsive in your industry. With these groups identified as potential prospects, you can use a few tactics to turn them from suspects to qualified prospects.

1. Use InMail Campaigns or Paid Ads (Direct Sponsored Content, Sponsored Updates). These efforts can be done automated but targeted to professionals that best fit your buyer personas.
2. Drive targeted audiences to destination URLs (Company LI Page, Profile, Webinar sign-up, Gated whitepapers). Use your profile and company page as a target page with a call to action.

Embed yourself where discussions are happening. Provide insightful feedback to questions or comments in groups or on your LinkedIn Feed. Showing expertise to your target market in these communities can position you and your company as part of their buying process.

Prospects would prefer to learn something to build their professional skills (another reason they are on LinkedIn), rather than view a demo. Use a pain point to help educate through a white paper, webinar or series of posts on the Company Page, as many are using social media to shape their buying decisions.



## STEP 5

# Quickly Build Quality Relationships

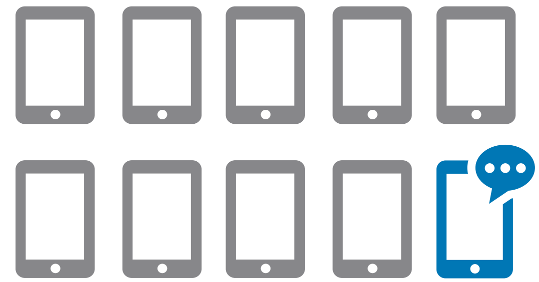
It is your responsibility to provide the best first impression for your company. Producers and Leaders need to build strong relationships over time, but it's up to you to develop those relationships quickly and interest prospects enough to compel action. Here are a few ways to build quality relationships quickly in order to qualify and send to producers, agents and advisors..

As you build quick relationships with prospects, use the introduction and recommendation features to get your revenue producers in front of potential prospects.

Respond quickly when buying signals are presented. If you use a marketing automation tool, make sure your trigger email is specific to the action the prospect has taken, rather than a generic response.

You can also do this through LinkedIn InMails. If part of your qualifying process is to make the initial outreach, try doing it through an InMail. You can reference common connections or groups and strike up a conversation based on the identified triggers from their LinkedIn activity.

If a prospect has given their information, don't hesitate to review their profile on LinkedIn. When they see that you viewed their profile, the prospect will feel you have taken the time to review their inquiry.



Building quality relationships on LinkedIn has become even more important as **90%** of decision makers never answer a cold call.

## STEP 6

# Measure and Optimize Your Efforts

When building your foundation, you aligned your KPIs with producers to determine success. You most likely will have analytics to track front-end results in your efforts, but it will be up to department leaders to relay back to you if your efforts help hit the KPIs they're looking for as well. Whether you are attaining your goals or not, it is important to gauge your LinkedIn efforts to determine if your target market is active and seeking information through LinkedIn as part of their buyer's  journey.

> *"There is a disconnect between what marketing is looking to accomplish and what they are measuring…*
>
> *Those in enterprise demand generation need to better align their goals and objectives with their metrics and KPIs."*
>
> *—Annuitas B2B Demand Gen Survey*

**Ask yourself these questions:**

1. Is there value coming from your LinkedIn Groups?
2. How many valuable discussions are you part of?
3. How much content are you posting daily/weekly?
4. Where is your audience consuming it most? Profile/Company Page/Groups?
5. Where are you finding most of your leads? Content engagement? Proactive Search? Groups? Personal Network?
6. How many leads were qualified through LinkedIn?
7. How many were transferred to reveneu producers through LinkedIn? Close rate?

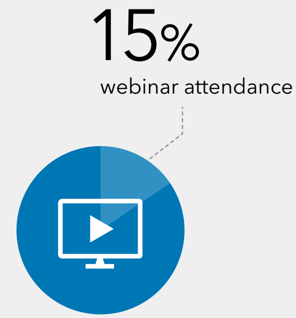
## STEP 6

# Measure and Optimize Your Efforts

**As you look to identify the value of your efforts on LinkedIn, search for statistics like:**

1. Engagement rate on posts (Likes, shares and clicks/impressions)
    - This will help identify content consumed by your audience
2. Community growth, both personal profile and company page
    - Increased community means larger network for common connections
3. Open rate and response rate on InMails
    - This will inform you if your InMail strategy and messaging is effective
4. Weekly discussions and comments per group
    - You can find these stats by clicking the "I" icon near the members count and clicking the "groups statistics" link

You will also look to coordinate these metrics with those of your targeted URLs. Relational statistics can help you identify where there may be a consistent drop in prospects during your buyer's journey.




For Instance, you sponsored an update on your LinkedIn Company Page about an upcoming webinar. You saw X number of clicks on that post that directed your audience to the webinar sign up page. Yet, when you got to the day of the webinar, your final attendee numbers were only 15% of your LinkedIn update's total clicks.

This may show that your webinar landing page did not provide enough engaging content or value to get users to sign up. Yet your social messaging on the LinkedIn Sponsored Update was enticing enough to get people to click.

# Conclusion

It's a Darwinian landscape for financial professionals as they continue to adapt to social media tools and prospects'buying expectations. The amount of information and tools used to consume it will only increase in the future and that will continue to shift the power in the buying relationship to the buyers. Revenue producers, agents and advisors will need to continue to establish themselves on platforms like LinkedIn to ensure they are considered in the buyer's journey.

You can use this 6-step social media success kit to build the infrastructure for social media strategy programs. Building from the ground up secures a foundation of social media with tactics supported by best practices. Whether you are a Revenue Producer, Department Leader or Marketer, you all have goals that can be met with social media and its up to you to implement and measure them to ensure your success. Just remember to work on your professional brand, interact with the right people, engage with your prospects and build quality relationships.

*For more information on social media best practices, follow the LinkedIn Sales Solution Blog.*

# Resources

**Resource and support documents/eBooks**

- Social Selling Success Webinar
- How-to Guide to Social Selling
- 21st Century Buying Experience
- Best-in-class coaching can shorten your sales cycle
- Annuitas B2B Enterprise Demand Generation Survey
- Subscribe to LS Blog RSS feed