



*Social  
is for  
closers*



## Deliver amazing customer experiences.

*Glengarry Glen Ross* is an amazing film, and I had a lot of fun with one of my favorite teams riffing on the famous Alec Baldwin scene as inspiration for naming this ebook. That being said, a lot has changed in sales since the fictitious burglary of the leads in that Chicago real estate office.

In my career at Disney, Oracle and now Microsoft, I've seen the amazing impact technology has on real business. In the dot-com boom, we focused on using technology to drive down costs, extend reach, and grow businesses. We were very successful, but ended up with businesses that were transactional. Today, social is a new part of our lives, something that puts a human element back into business in a way that scales beyond face-to-face interactions. Sales teams have an unprecedented opportunity to reach more would-be customers than ever, and the way we sell will never be the same.

This first ebook on social listening for sales also accompanies the launch of Microsoft Social Listening and Social Insights, powered by InsideView. Both are now available in Dynamics CRM at no additional cost and can be used by anyone with a professional license\*. This type of affordable, democratized social insights is set to change the game for our customers, and we've only just begun.

We hope you find this series valuable to your organization, and we look forward to hearing about how you deliver amazing customer experiences.

All my best,

*Fred Studer*

*GM, Microsoft Dynamics CRM*

<https://twitter.com/fredstuder>

# TABLE OF CONTENTS

page 4	Social Selling Using Online Networks to Build Relationships and Boost Sales
5	Social Sales Quickstart
6	Using Social Listening to Drive Sales Leads
7	Nurturing Leads with Social Insights
8	Building Lasting Social Media Relationships
9	Insights from the Experts

# Social Selling

## USING ONLINE NETWORKS TO BUILD RELATIONSHIPS AND BOOST SALES



Customers want to be treated like individuals, not psychographic profiles. The more connected you are to today's social and mobile customer, the better chance you have of establishing trust and having an honest dialogue. Social doesn't replace email. Cold calls aren't dead. These tactics all have their time and place, but social represents the most exciting channel that sales has had in a long time to stay connected and informed.

Successful social selling hinges on authentically connecting with customers on social networks, building trusted relationships with them, and ultimately helping them solve problems that lead to lasting business relationships.

### **If you aren't tapping into social selling, you're missing out.**

In 2012, sales people using social media to sell outperformed those who weren't using social media 78.6% of the time.<sup>1</sup> What's more, social sales people were 23% more successful at exceeding their quotas than their non-social sales peers. Social sales people are doing all this by spending just 10% of their time on social channels. Surprisingly, however, more than half of the sales organizations surveyed by the Sales Management Association believe their current social efforts are not sufficient: 55% say they would be more productive if they had a larger social presence.

Imagine the possibilities of throwing a formal social strategy into the sales mix. Social helps you find prospects as they are actively searching for products or looking for solutions your company can offer. Social enables you to extend what makes great sales people—connecting with customers, listening, and building relationships. It doesn't replace anything, but rather scales your ability to connect authentically with your prospects. Use the invaluable context and second-degree connections to reach prospects at their point of need and through a trusted, mutual connection.

The most effective sales teams make it easy for their executives and account managers to make sense of social data. In the following pages, you'll discover how to use social to drive sales leads, move those leads through the sales funnel, and build lasting social relationships.

<sup>1</sup> A Sales Guy Consulting: [http://info.asalesguyconsulting.com/Portals/166003/docs/social\\_media\\_sales\\_quota.pdf](http://info.asalesguyconsulting.com/Portals/166003/docs/social_media_sales_quota.pdf)

# Social Sales QUICKSTART

Today's customers make purchases the way they choose, researching online before walking into a store or talking to a sales representative. CEB analysts found that customers are 57% through the typical decision-making process before they ever engage with a sales rep <sup>1</sup>. SiriusDecisions also reports that customers are 70% through the buying process in a complex sales situation <sup>2</sup>.

That means if your sales team is not online, your prospects will not be able to find you during these critical research stages. Creating complete social profiles with education and work experience is just the first step to meeting your customers the way they prefer. The best social salespeople build out their online presence by connecting to their customers (who can provide references), listening to influencers in their industry, and sharing updates that showcase their expertise in their field.



# Using Social Listening TO DRIVE SALES LEADS



Salespeople know that their book of business is built on personalized interactions. Social offers the ability to scale these interactions, leading to greater productivity, and ultimately, sales. This ability comes with expectations; customers are now accustomed to reps that follow their activity—and only reach out when the time is right and with the right message. Successful social salespeople don't broadcast generic marketing messages or post overt product pitches. In fact, both those ingredients are part of a recipe for irrelevance that can annoy would-be customers and shrink followings.

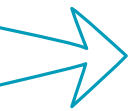
In today's over-subscribed, under-resourced world, it's not possible to be high-touch with everyone all the time, so the smart salesperson has learned to be low-touch until the opportunity arises to be high touch. Social listening can help you identify true leads and allow you to offer your solution in a conversational context. With that in mind, here are 3 ways to use social listening to identify sales leads:

**1. Empower your sales team with social insights:** Today, some of the more advanced sales teams have set up social listening software to monitor keywords that suggest customers are actively searching for a product recommendation. They adapt their typical discovery questions to key phrases people may be searching for in their industry, and then route these leads to the right salesperson. Another best practice is to provide social insights at the lead, contact, and account level within your CRM system. Microsoft Dynamics, for example, provides all sales professionals with access to social insights on leads, contacts, and accounts at no additional cost and can be used by anyone with a professional license\*.

**2. Monitor your competition:** Listening to what customers are saying about your brand can open the door to offering relevant solutions, but listening to what people are saying about your competitors can showcase weak spots in their offering. Think of it as an opportunity to help, and have the appropriate salesperson send the customer something useful. Are people dissatisfied with a competitor's product? Can your product pick up the slack? Monitoring the competition can help you deposition them and drive more leads for your team.

**3. Get personal:** OK, not too personal. Simply pitching your products into the social media realm is like speaking to an empty room. On social, people expect to receive personalized messages. Have your sales team engage in conversations with prospects on social networks. When they post about those new watch styles on Facebook, have information on industry trends ready for your team to respond with to subtly throw your brand into the mix. With a coordinated effort from your sales team, you can start to work towards answering every post by your top target accounts.

\*Social Insights, powered by InsideView is currently only available in the US.



# Nurturing Leads WITH SOCIAL INSIGHTS

## Do your homework.

Mastering the use of LinkedIn, Twitter, and Facebook as research tools allows reps to speak credibly to a prospect's job, industry, family, and interests—giving reps invaluable context for conversation before they ever pick up the phone or compose an email. One of the easiest ways to reduce the social “noise” is to integrate real-time social data into your CRM. When you can associate social data to a specific account or lead record, you enable your sales team to have more productive conversations.

Doing your homework also means staying on the lookout for potential referrals or introductions, something social networks help to streamline.

## Showcase your expertise to stay top-of-mind.

More importantly, you need to have incredible content that actually teaches someone something new or helps them do their jobs better. Partnering with marketing to provide this type of content can boost your sales team's relevancy and position your salespeople as thought leaders.

Buyers today are not satisfied with a one-dimensional sales pitch. They are looking for trusted experts who can enable them to make a purchase decision with multifaceted research and resources. If your sellers are not building relationships to position themselves as advisors, your competition could swoop in and earn new customers by filling this gap.

The best salespeople understand that regularly sharing valuable tools and insights about their products, industry updates, and personal updates can help them stay top-of-mind with their customers, as well as build rapport and convey positive character.

Salespeople who are just starting out on social can lean on their marketing department for high-quality content to post, while salespeople who are more savvy on social can add marketing's content to their existing social posts.

The biggest risk of social selling is not doing anything. Don't be afraid to engage. Now that you're following leads and collecting social intel in your CRM records, spend a few minutes each day to read the content a someone has posted—and pass it on if you learned something valuable.



# Building Lasting **SOCIAL MEDIA RELATIONSHIPS**

Today's social networks are built on authentic, personal relationships between people, so it makes sense that overt pitches or ads don't do well with customers on social. The best social sales reps keep that in mind and show their human side on social. This enables them to build trust and rapport with their customers, so that when a risky business decision arises, they will want to do business with them.

The best sales leaders are plugged into the social activity of their top accounts. By following your contacts on social channels, you'll be able to develop a rapport, as well as respond to any issues or challenges they encounter.

Every good relationship starts with conversation—and it's not just about you talking up a social media storm. The best relationships involve listening and responding. And like any relationship, you get out what you put into it.

**1. Connect with your customers and prospects on the appropriate channel:** Although Facebook and Twitter are the most popular social networks, LinkedIn is the best option for business-to-business sales. Also, don't neglect blogs and forums as well. Many sales operations leaders now leverage social listening technology to discover the primary digital communities of their target audience and lead a focused effort to establish a helpful, consultative presence in those areas.

## **2. Partner with customer service:**

Sometimes, a salesperson will find a dissatisfied customer with a problem that is too complex to address on his or her own. No one expects sales to become service professionals, but working with your service team to create open channels of communication can help get that customer the answers and help they need in record time. You should also actively publish examples of the amazing customer experiences your service team creates.

**3. Mix it up:** Scatter your posts over different times of the day. You'll reach more of your audience by spreading your content across different time zones. When should you post? There's plenty of research out there and some of it is conflicting. The best answer is to do your own tests. Discover when you get the best traction. You may find some clues from your e-mail marketing campaigns. Some companies no longer send emails early in the morning on a weekday because everyone's inbox is flooded. Find what works for your followers—and keep iterating.

**TIP:** Following your leads on LinkedIn and Twitter can open the door to new opportunities. Simply posting Happy Birthday, or congratulating someone on a new position can go a long way to building and maintaining relationships.



# Insights FROM THE EXPERTS



We published these responses from some of the world's most influential social thought leaders, raw and unfiltered. While the views expressed here may not necessarily reflect the views of Microsoft or endorse Microsoft's products, we are all about diversity of opinion and open dialogue. We believe this is the best way we can support our customers.

As we continue to build on this series to discover how companies are creating amazing customer experiences on social, we'd love to hear from you.

Who should we reach out to?  
How should we look at this differently?  
Let us know at [@MSFTDynamics](https://twitter.com/MSFTDynamics).

Regards,

The Microsoft Dynamics CRM Team

# CLARA SHIH

CEO & Founder **Hearsay Social**, board member of **Starbucks**, author of *The Facebook Era*  
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## What are three key elements of an effective social strategy?

- Focus on customer rather than on functional silos
- Clear business goals and metrics
- Executive sponsorship

## How has engaging your customers on social benefited your company or your clients?

- Product ideas and feedback
- Word of mouth
- Close connection with the customer voice and stories which are incredibly compelling to all of our employees

## What are some tips on dealing with negative sentiment on social?

Be honest and responsive. Diffuse and move the conversation offline if possible. View it as an opportunity to get even better.

## Who are the top 5 people you follow on social?

- Aaron Levie: @levie
- Jeff Weiner: @jeffweiner
- Bill Murray: @billmurray (parody account)
- Linda Descano: <http://www.linkedin.com/influencer/204274949>
- Mohamed El-Erian: <http://www.linkedin.com/today/influencer?authorId=34334392>

## What are your top 3 tips on how to get up to speed on social?

- 1) Use social like a consumer first to learn the etiquette, lingo, and customer perspective, and only then start using it for business.
- 2) See how the best companies do it and adapt the best ideas for your business (e.g, Starbucks, AXA, Lululemon).
- 3) Start small and keep iterating. Social media is a long-term commitment, not a one-off campaign. Don't be afraid of failure or not getting it exactly right the first time around.

## How important is social listening to your marketing team or marketing teams in general?

Extremely important to listen first before responding or taking other action.

## How important is social listening to your sales team or sales teams in general?

Extremely important. Sales is the next frontier of social business. At Hearsay Social, we started our entire company on this premise and have seen record growth year after year since we founded the company in early 2010.

## How important is social listening to your customer service team or teams in general?

Very important. Depends on the industry you are in and whether your customers want to be serviced through social media channels.

# BRIAN SOLIS

Principal Analyst at **Altimeter Group** and author of *What's the Future of Business (WTF)*  
@briansolis



## What are three key elements of an effective social strategy?

In a recent Altimeter Group report published by Charlene Li and me, we found that only 17% of companies identify their social strategy as mature. Just 60% feel their social strategy is connected to actual business goals.

After all of these years, the evolution of social media is not as far along as many would like to believe.

1) In our research, we also learned that just over one-third of businesses look at metrics beyond likes, followers, and comments to measure the impact on the company bottom line. This means that most businesses are looking at tactical numbers and not the bigger picture. These engagement metrics only represent activity and not necessarily movement toward something more meaningful or important.

An effective social strategy starts with defining what it is your social strategy is designed to do. Believe it or not, this is something that most businesses miss. Aligning social media strategies with business goals from the onset helps organizations begin a meaningful journey toward becoming a social business.

2) Your social media strategy must set out to do something meaningful. Unfortunately, organizations jump into social without thinking of the greater benefits for the brand and for customers and employees. Everything starts with defining a vision and purpose for your social media strategy. It must articulate what customer relationships and experiences will look like.

- What will you improve?
- What is your mission?
- How will you add value?
- How would your customers confirm that your social strategy is brilliant?
- What would they say?

This is your North Star.

3) A true social strategy also looks beyond marketing. Yet today, most social media strategies are run by the marketing team, which creates a silo. While marketing is important, an effective social strategy considers the customer lifecycle. A mere 28% of businesses we studied felt that they had a holistic approach to social media, where lines of business and business functions operate in a unified and complementary fashion.

Consider how marketing, service, HR, and lines of business can work together to meet the needs and expectations of prospects and customers. The only way to break down silos is to work together.

# MORGAN NORMAN

VP of Revenue Generation **Zuora**

@meetmorg



## What are three key elements of an effective social strategy?

- Enable your whole company, and send the right story to the right people.
- You have to listen to where your customers are and understand your presence. You can use social listening as a benchmark.
- Many people have a fragmented social strategy, and the social presence often doesn't match the brand presence. It's important to match that voice.

## How has engaging your customers on social benefited your company or your clients?

Social helps us reach people outside of our database, for example, people that are experiencing a problem that we haven't thought about yet. Social has helped us become more of an agile organization, and we can evolve our story and our messaging quickly. Social also lets you build on PR. In the past it would just die off, but social lets you keep a story alive over a longer period. Social is also one of the greatest ways to launch products. It allows people to offer a lot of promos, and you can test various mechanisms and see how people respond in real time.

## What are some tips on dealing with negative sentiment on social?

- The most important thing is to be responsive. You can't ignore it. You have to first understand what you've done to not meet someone's needs, and you need to act fast.
- The other thing is that people are not trained in customer service. They don't know how to immediately give someone the right answer. People are not only tweeting a company, they are tweeting the CEO. You need to empower everyone to respond. Social enterprise solutions, such as Yammer, can really help with this. You should also build a follow-up process to learn.

## Who are the top 5 people you follow on social?

I spend my time following new brands. This helps me understand their social approach. I'm more curious about brands than people. Hipmunk. Hubspot. Marketo. Mailchimp. I'm looking for techniques. You know, it's one thing for people to connect with people, but how to companies connect with their customers in meaningful ways.

## What are your top 3 tips on how to get up to speed on social?

- Like all things you just have to do it. You have to get dirty. If you are in sales you need to follow your industry, competitors, brands. Identify your industry influencers. Know who the top leaders in companies are. Follow them on LinkedIn, Twitter, Facebook. Get connected to marketing. Leverage the content that marketing provides to offer consultative material that actually helps people do their jobs.
- For marketers, you should really think about how you empower your entire company to distribute your content. Create an integrated, cross-department approach. This ebook is about social listening and this is the first thing you need to do. Understand what matters to your target audience and create content around that, not what you think they want, but what they are actually asking about. Break out of Twitter and LinkedIn. Look at Slideshare, social webinars. Don't be shy about reaching out to other people to learn. Take twenty minutes with someone that you respect and see what they are doing. You have to record social ROI. Your landing pages need to tag leads accordingly, so you can make data driven decisions about where to spend your time. A lot of people miss the analytics of social, and this is a mistake. You should be all over it.
- Design matters in social. Don't be cheap. Designers are the new engineers in Silicon Valley. Create digestible content.

## How important is social listening to your marketing team?

Extremely. This depends on your brand. Are you B2B? B2C? Of course it's very important, but it's different for all companies.

## How important is social listening to your sales team?

Very important. While we are interested in social, our account executives are busy. From a demand gen perspective, it's extremely important. From a sales perspective, it's very important when you have time.

## How important is social listening to your service team?

It's hard to rate it in this way. Of course it's important. For Zuora, our service comes through other channels. In the perspective of empowering buyers is extremely important, but it's not the main way that people reach out to us.

# MICHAEL BRITO

Group Director, Content & Engagement **The W2O Group**  
@britopian



## What are three key elements of an effective social strategy?

I would say that the three elements of a social strategy consist of analytics, content and engagement. Analytics will give you a 360-degree view of your customer and what they truly care about. In addition, looking at historical content performance is key to better understanding how and when they like to consume content. These variables will help deliver a more effective brand story (content) that will break through the clutter and reach consumers with game-changing content. The last is engagement. What's the point of creating awesome content if you aren't going to prove that the brand is human and engage in a conversation.

## How has engaging your customers on social benefited your company or your clients?

Engagement equals brand love. When brands prove that they are human, solve customer problems and/or provide helpful information, they naturally create brand advocates. An advocate is someone who will promote or defend the brand without being asked to do so. This is good for all brands.

## What are some tips on dealing with negative sentiment on social?

The first tip is to ensure that the sentiment data is actually accurate. Sentiment analysis still has a long way to go before it can be substantiated as a good measurement framework. That said, the second tip is to "only" engage in negative conversations if you are actually planning on having a resolution. If you aren't prepared to manage negativity, then I would say that social media may not be the right channel for you to engage in quite yet.

## Who are the top 5 people you follow on social?

- Jeremiah Owyang: @jowyang
- Jacob Morgan: @jacobm
- Dave Berkowitz: @dberkowitz
- Brian Solis: @briansolis
- Jay Baer: @jaybaer

## What are your top 3 tips on how to get up to speed on social?

- 1) Just do it. Stop procrastinating. You will make mistakes and learn from them.
- 2) Read a lot. There are several blog posts and resources for you.
- 3) Participate: Use the tools personally so you can learn how to apply them professionally.

## How important is social listening to your marketing team or marketing teams in general?

Extremely. Just like any relationship, the majority of what you should be doing is listening.

## How important is social listening to your sales team or sales teams in general?

Extremely. For the same reasons above.

## How important is social listening to your customer service team or teams in general?

Extremely.

# JESSICA SMITH

Senior Marketing Director **FlexJobs.com**

@JessicaNow



## What are three key elements of an effective social strategy?

- Defining what success looks like and being able to clearly articulate it to the organization.
- Setting a baseline and then mapping metrics to that success so the team can pivot and optimize appropriately.
- Developing tactics to support and then testing, measuring, and tweaking those tactics to reach established goals and benchmarks.

## How has engaging your customers on social benefited your company or your clients?

A job search can be very personal for a lot of people so we identify their pain points and address them through a robust content strategy that aims to be helpful but still respects that this is a personal experience for them. By measuring engagement, we have also realized that jobseekers like to hear first-hand experiences of other jobseekers so we regularly featured job seeker success stories. These get a lot of great responses across our social channels. The benefits of having strong content and different voices represented is that our content is shared across various social channels. Unlike other job boards, our paying customer is the jobseeker versus the employers, so our conversations and content are based on what they, the jobseekers, want and what they have expressed that they need.

## What are some tips on dealing with negative sentiment on social?

There are varying degrees of negative sentiment that companies will deal with on social. For example, a customer complaint that is easily and quickly resolved is a lot different than a crisis situation where the impact to business is large and hard to contain. Here are 5 things I recommend when faced with negative sentiment on social.

- Even if you don't have an immediate answer or solution, acknowledge the frustration/anger/disappointment immediately so that the person (or people) know they have been heard and that it's being addressed. Do this publicly on the social channel where the negative sentiment was initiated.

- Next step is to have them privately send you their preferred method of direct contact information such as a phone number or email so that you can take the conversation offline. You will accomplish more one on one.
- With that said, remember that anything you say through private channels can easily be relayed via social. Be especially careful with what you send via email as screenshots can be taken and shared within minutes.
- Make sure every communication you have demonstrates your commitment to resolution.
- If the person or people insist on continuing the conversation via the social channel versus one-on-one, don't panic. Use this as an opportunity to show the public how well your organization handles their customer experience and how responsive you are via social.
- Sometimes you will run into people who do not want to resolve the issue and really just want to drag your name through the mud. This is unfortunate but not unusual. Take the high road, offer reasonable solutions, and be clear and concise in your communication. If you remain reasonable and fair, you will find that you will come out more respected by your existing fans and might pick up a few new ones because of your professionalism.

## Who are the top 5 people you follow on social?

- John Andrews: [www.linkedin.com/in/katadhin](http://www.linkedin.com/in/katadhin)
- David Meerman Scott: [www.linkedin.com/in/davidmeermanscott](http://www.linkedin.com/in/davidmeermanscott)
- Maggie McGary: [www.linkedin.com/in/maggiemcgary](http://www.linkedin.com/in/maggiemcgary)
- Amy Vernon: [www.linkedin.com/in/amyvernon](http://www.linkedin.com/in/amyvernon)
- Don Bartholomew: [www.linkedin.com/in/donbartholomew](http://www.linkedin.com/in/donbartholomew)

## What are your top 3 tips on how to get up to speed on social?

- Don't overthink it. Just remember it's two-way communication, so don't use it like a bullhorn.
- Think about your personal favorite brands, and see how they are using social.
- Be active on LinkedIn; there are lots of really good influencers sharing their expertise.

# RYAN HOLMES

CEO, HootSuite  
@invoker



## What are three key elements of an effective social strategy?

- **Planning and goal-setting.** What goals are you trying to achieve as an organization? Who are your customers, and what is most important to them? What level of social empowerment are you looking to achieve—team, department, or organization-wide? Are you in a regulated industry, such as healthcare or financial services, where there are communication restrictions?

Consider how social media can help your company achieve its most important objectives and then set some goals. Next, identify the resources necessary to manage your social media efforts, set guidelines for how employees should engage in social media, and provide training to encourage active participation that is aligned with company goals.

- **Active listening and engagement.** Start by monitoring for mentions—the good, the bad and the ugly—of your brand. Also listen for cues and trends in your industry and on your competitors. Next, follow the conversations and the people that are relevant to your business. Then begin to engage in conversations with content that is interesting, relevant or useful to your audience. Retweet posts you find interesting and use hashtags to increase the discoverability of your content.
- **Measure results.** Provide visibility on how your social programs are moving the needle. If you are just kick-starting your social media strategy, start with tracking the Like, @ mention, Retweet or Follow activity. As your social strategy becomes more advanced, build the capacity to measure every social action, and link to key business goals, such as brand sentiment, revenue and customer satisfaction. One way to do this is to use a URL shortener (like ow.ly), to track your click-throughs and leverage analytics to measure on-site conversions. You can even drill into location-specific data to develop geographic insights on your social efforts.

## How has engaging your customers on social benefited your company or your clients?

Social media is an integral part of our entire organization—from customer support, to marketing and sales.

Our customers move at the speed of social. When they reach out to us, we need to respond quickly. It also allows us to be proactive with our clients. We use our own platform to constantly listen to online conversations about our product so we can spot and respond to positive and negative feedback as quickly as possible and respond accordingly. Our support department—a 17-person team that supports 8 million users—uses social media daily to engage with our clients more effectively online. This allows us to be more available, deliver faster responses, and engage with our clients by being where they are. Thanks in large part to social media, HootSuite boasts a customer support satisfaction rate that exceeds industry standards.

Every customer matters, and their experience with your company determines not just whether they will continue to be a loyal customer, but whether they will advocate your product or service to their followers. At HootSuite, more than half of our Enterprise clients started out by using our Free product. These customers increased their investment in HootSuite over time because they grew to trust and depend on our product, and because they appreciate that we valued them even before establishing a financial relationship. We use social media to connect with these customers and support them on their social journey.

Our sales department uses social media to identify prospects who express purchase intent or indicate that they are in a position to buy. These buying signals are visible, in real-time on social networks such as Twitter, LinkedIn Groups, as well as blogs and forums. By proactively reaching out to buyers who are looking to purchase, our sales team is able to have meaningful conversations directly with the decision maker.

*Read on >*

# RYAN HOLMES (continued)

## What are some tips on dealing with negative sentiment on social?

Nielson has reported that more than half of all U.S. consumers now turn to social media to air questions and complaints about products and services. The good news: The majority of consumers who experience a quick and effective brand response on social media are likely to recommend that brand to others.

So it's important to spot negative comments about your brand quickly and then address them immediately and effectively. If the negative sentiment is based on misinformation, correct the misinformation publicly in the social channel. When a customer complaint is a matter of opinion, acknowledge the concern and then make arrangements to connect with them privately to resolve the concern.

At HootSuite, we see every complaint as a golden opportunity. When a customer reaches out to us we see it as a chance to engage with them and also learn from their feedback.

## Who are the top 5 people you follow on social?

- Jeremiah Owyang: @jowyang  
Chief Catalyst at Crowd Companies. His career mission: to help corporations connect with customers using web technologies
- Sree Sreenivasan: @Sree  
One of the earliest and most thoughtful social media evangelists, formerly of Columbia University, now Chief Digital Officer at the Metropolitan Museum of Art
- Charlene Li: @charleneli  
Founder of the Altimeter Group - thought leader in all things social Enterprise
- John Legere: @johnlegere  
Outspoken CEO of T-Mobile who is leveraging social to shake up the industry
- Peter Aceto: @PeterAceto  
CEO of ING Direct Canada and a truly social CEO

## What are your top 3 tips on how to get up to speed on social?

Getting up to speed on social at an enterprise level requires a holistic approach that includes change management, technology adoption, and security considerations:

- 1) Educate employees on the appropriate use of social media in a professional setting, along with the best practices on building deep relationships with customers over social channels. According to Altimeter, only 18% of companies said that their employees have a good or very good understanding of their social media policies. At HootSuite, we have mandatory social media training for all of our new employees.

- 2) Deploy a social relationship platform to empower your employees to share company content over social channels. This helps them to build their credibility with customers by being seen as industry experts. The right technology can help you do this at scale with capabilities like delegation and approvals to enforce process, and workflow and assignments to help teams collaborate on social. An open platform capable of integrating with existing line of business applications is essential for a seamless user experience.
- 3) Secure and protect your social presence. As you scale your social media strategy across the organization, involving more and more employees to support your social business goals, the chance of a mistake or a full-blown crisis can increase exponentially. By following a few basic social media security best practices, you can substantially decrease the risks many associate with these channels. These include centralizing control of social media accounts, creating complex passwords and using Single Sign-On technology.

## How important is social listening to your marketing team?

Social listening is extremely important across our marketing team, and is incorporated into activities such as campaign measurement, demand generation, reputation management and influencer marketing. We rely on social listening to create campaigns that resonate with our community. For example, our demand generation team uses social media to identify top-performing keywords that are applied to search engine optimization, pay-per-click advertising, and content marketing. Our corporate communication team relies on social listening to track brand sentiment and engagement with top influencers.

## How important is social listening to your sales team?

Social listening is an integral part of our sales process. Our sales team regularly listens to clients and prospective clients for buying signals over networks like Twitter or LinkedIn, and come in at the right time with an ice breaker to engage prospects. We use social media as "the thin edge of the wedge": a way to open up discussions with decision makers. We've found that social media is an effective and personal way to open doors.

## How important is social listening to your service team?

Our customer service team pro-actively tracks @mentions and keywords that may not have reached our specific customer service accounts. This allows us the opportunity to respond and mitigate even more customer inquiries than a typical inbound approach.



# JASON MILLER

Senior Content Marketing and Social Media Manager, LinkedIn Marketing Solutions, **LinkedIn**  
@JasonMillerCA



## What are three key elements of an effective social strategy?

Good question. From my experience it would be:

- Social Intelligence (Listening). Having the right tools in place to monitor conversations around your brand, where they are happening, and who's saying what is essential. Taking it up a notch to measure sentiment, share of voice and share of conversation is where some of the best insights can happen.
- Continual Source of Content (Fuel). Content fuels social; without it, your business objectives will likely fail.
- Budget to Promote (Extend Reach/ Targeting). 2014 is the year of pay to play. If you are serious about social media, then you need to have a serious budget in place to support both headcount and native advertising, with an emphasis on mobile.

## How has engaging your customers on social benefited your company or your clients?

First and foremost it shows that your company is paying attention and communicating with them where they choose to be. Social has changed everything in terms of how customers and prospects buy. They are now in control of their journey and will go on it with or without your company being involved. Engaging in social very early on is essential for building relationships with these folks and staying top of mind so that when they are ready to buy, your company will likely be their first choice.

## What are some tips on dealing with negative sentiment on social?

It's all about responding promptly and sincerely. Social media gives everyone an equal voice for both praise and complaints. Many times they simply want to know that they are being heard, and responding quickly and offering to help can very often turn a negative mention into a positive one.

## Who are the top 5 people you follow on social?

- Ann Handley: <http://www.linkedin.com/in/annhandley>
- Brian Clark: <http://www.linkedin.com/pub/brian-clark/8/606/b5a>
- Mike Stelzner: <http://www.linkedin.com/in/stelzner>
- Jay Baer: [www.linkedin.com/in/jasonbaer](http://www.linkedin.com/in/jasonbaer)
- Nichole Kelly: [www.linkedin.com/in/nicholekelly](http://www.linkedin.com/in/nicholekelly)

## What are your top 3 tips on how to get up to speed on social?

- 1) Put together a plan. Have a 30-60-90 day plan in place so that you don't get overwhelmed up front and give up before you start to see results, and stick with it. Social media success does not happen overnight.
- 2) Set Your goals. List the goals that you are looking to achieve with social: lead gen, brand awareness, customer service etc. They should be aligned and support your overall business goals.
- 3) Don't over complicate things. It's going to take time, effort, budget and headcount but you don't have to do it alone. There are a ton of great consultants and agencies that can help you get your social strategy up and running and into a good place where it will be delivering value.

## What are your top 3 favorite educational resources for social listening?

Social Media Examiner, Social Media Explorer, and the Hootsuite Blog.

## How important is social listening to your marketing team or marketing teams in general?

Extremely. Customers and prospects expect responses in near real time. Arriving late to the conversation means you have missed your opportunity.

## How important is social listening to your sales team or sales teams in general?

Extremely. Again, I cannot stress this point enough. These are not only conversations, but opportunities for both sales and marketers to interact with customers and prospects. If you are not listening, you are simply missing opportunities, and ultimately sales.

## How important is social listening to your customer service team or customer service teams in general?

Extremely. The voice of the customer is bigger and louder than ever before. Social is their telephone which can quickly turn into a megaphone. If your customer service team is not monitoring the conversations closely and responding promptly then your brand/ product and or service will suffer.

# BRIAN CARTER

CEO, Lead Consultant, Keynote Speaker **The Carter Group**  
@briancarter



## What are three key elements of an effective social strategy?

- A budget for social ads
- Consistent creation of high quality content
- Using the first two to build the size and diversity of your owned media lists (email, fans, followers, group members, retargeting audiences)

## How has engaging your customers on social benefited your company or your clients?

Pretty incalculable. First, the ROI of networking is impossible to anticipate and very hard to quantify. I've met several people who've changed my career in good ways. Engagement on Facebook is critical to remaining visible and top of mind while reducing how much you have to spend to do so. Also, it's important to engage non-customers too, if you want lead gen and new customers.

## What are some tips on dealing with negative sentiment on social?

First, if it's true, fix your company. Beyond that, I believe in being proactive and owning the space in which you distribute content and lead conversations - that could be a Facebook page or group or a LinkedIn group. I believe you should be clear about the behavior you want to see, what kind of comments are unacceptable and what will get people banned. I don't worry about eliminating those people, because my best customers are not the trolls or the people who dislike me anyway.

## Who are the top 5 people you follow on social?

I mainly use Facebook (on Twitter, I follow too many people to use my stream) and don't typically follow people on Facebook that I'm not friends with - but I am friends and fellow group members with some folks who are both fun and smart:

- Jason Miller of LinkedIn: <https://www.facebook.com/Jasonmillerca>. He's amazing at content marketing.
- Merry Morud of AIMClear: <https://www.facebook.com/merry.morud>. She's a Facebook ad guru.

- Jay Baer of Convince & Convert: <https://www.facebook.com/jaybaer>. Probably the classiest social media speaker.
- Michael Stelzner of Social Media Examiner: <https://www.facebook.com/stelzner>. Amazing at business having grown an agency, a white paper business and now SME and the Social Media Marketing World conference.
- Jeff Widman of Unified: <https://www.facebook.com/jeffwidman>. Super smart on stats and analyzing social media.

## What are your top 3 tips on how to get up to speed on social?

I can't do just three! It's such a huge amount of learning... Buy books, go to conferences, get into good discussion groups, network with experts and gurus in person, and set up a Google blog alert on the topics you're trying to learn.

## How important is social listening to your marketing team or marketing teams in general?

I think it's more valuable to PR and customer service than to "direct" (results-oriented) social marketing. The other side is competitive intel like InfiniGraph does, and psychometric market research like Facebook Graph Search. I'd much rather understand my prospects and customers that way than read the typical SM listening reports on people who mention my company. The people who talk about companies aren't always the customers, so it's more of a PR thing to me.

## How important is social listening to your sales team or sales teams in general?

I believe sales and marketing should collaborate, and this is more of a marketing/PR function. However, anywhere the complaints heard in social listening echo what salespeople hear in objections? That's important and needs to be addressed.

## How important is social listening to your customer service team or teams in general?

Your customer service team definitely needs to be paying attention for cries for help via social.

# JOHN ANDREWS

President, **The Katadhin Group**  
@katadhin



## What are three key elements of an effective social strategy?

- Clear, measurable objectives
- Content plan (curation, original, user)
- Communication guardrails (delivering a message without controlling the message)

## How has engaging your customers on social benefited your company or your clients?

It's created real relationships with clients and customers alike that resulted in:

- 1) Better communication
- 2) Higher levels of customer interaction
- 3) Measured conversion and sales impact

## What are some tips on dealing with negative sentiment on social?

- Be positive, deal with the issue not the emotion.
- If you're wrong, apologize.
- Ignore haters, Haters Hate—most people realize the difference between legitimate complaints and brand bashing.

## Who are the top 5 people you follow on social?

- Ted Rubin: @TedRubin
- Umang Shah: @UmangShah
- Zach West: @ZachDWest
- Robert Moore: @MediaLabRat
- Jim Tobin: @Jtobin

## What are your top 3 tips on how to get up to speed on social?

- Get involved—use the tools to understand them
- Be flexible—the landscape is changing quickly
- Measure everything

## How important is social listening to your marketing team or marketing teams in general?

Extremely. The lack of engagement is a good sign that no one cares what you have to say. Figure out what types of things elicit interaction and do more of those!

## How important is social listening to your sales team or sales teams in general?

Extremely. What are your customers and fans saying (or not) about them and their competitors? What conversations do they want to own?

## How important is social listening to your customer service team or teams in general?

Extremely. If there were one area to excel at, social service would be it. There is no bigger fail than having an active social stream and producing crickets when someone has a problem or question.

# STÉPHANE SAMSON

Group Brand Director, Lotus F1 Team  
@stephanesamson



## What are three key elements of an effective social strategy?

The first key element, for Lotus, would have to be the interaction with the fans. We never look at the raw figures but at our engagement rate. We, first of all, want to create a genuine community, and not one of the diluted, monstrous army of “fans” who finally do not really care about your brand. This is the reason why we never fell into the paid campaigns on Facebook to grow drastically our fan base, for example.

Secondly, creativity is really important too: you need to surprise and entertain your fans, you want to go viral from time to time. Lotus often gets close to the line, but it's part of the game.

Finally, you need to be responsive. Answers and re-tweets have to be sent instantly, not two days after the original message was posted. It helps to humanize your social presence, which is key in building a strong and engaged community.

## How has engaging your customers on social benefited your company or your clients?

It has actually helped us build the brand the way we wanted to. Lotus F1 Team is all about being approachable, but also cheeky and sometimes disruptive. We've always been honest and transparent too. This is something that our fans liked a lot, especially compared to our rivals' approach. Engaging with customers has helped Lotus F1 Team establish itself as a new race team, as everybody today seems to have forgotten about Renault.

## What are some tips on dealing with negative sentiment on social?

As we said before, we never deny if the negative sentiment is generated by a true story. We sometimes acknowledge, we even apologize when we have to. Of course, some people will always go too far and their messages will require moderation if not appropriate. But it does not happen that often.

## Who are the top 5 people you follow on social?

- Usain Bolt: [@usainbolt](https://www.facebook.com/usainbolt)
- Manchester City: <https://www.facebook.com/mcfcofficial>
- Element: [instagram.com/elementusa](https://www.instagram.com/elementusa)
- LeBron James: <https://www.facebook.com/LeBron>
- Mashable: <https://www.facebook.com/mashable>

## What are your top 3 tips on how to get up to speed on social?

Be responsive, be daring, be honest.  
Listen, monitor and engage.

## How important is social listening to your marketing team or marketing teams in general?

Extremely. We're part of the same team, building a brand. In this respect we need to be fully in line.

## How important is social listening to your sales team or sales teams in general?

Not very. Social media are not used to please our sponsors, but we always show them a lot of respect.

# BRIAN KELLY

Chief Marketing Officer, **InsideView**  
@bkkelly



## What are three key elements of an effective social strategy?

- 1) Be relevant. Anyone can post on social sites, or respond to the contribution of others. The most effective social influencers are both contributors and consumers of relevant information.
- 2) Communicate innovative ideas fearlessly. Consumers of social information are drawn to new ideas and break through approaches to existing problems. Creating social discussion around topics that are both relevant and that provide new perspectives and ideas are likely to attract the attention of the audiences that matter to you. For example, blogging about new approaches to precision targeting, by a CMO who is in the trenches, will attract the attention of marketers.
- 3) Be authentic. Make valuable contributions about topics that you understand and be open to responses, both negative and positive, about your point of view. High-energy dialogue, even between opposing views, often leads to even better information and even more useful ideas.

## How has engaging your customers on social benefited your company or your clients?

InsideView is at the heart of social. One of the major contributions that we make for our customers is that we reveal social insights about the buyers they target as marketers and sales people. Our users follow us socially, and are quick to respond to our news, our events and our ideas—and they do it socially. This open dialogue with our customers gives us real-time information that helps us guide our priorities and our product plans.

## What are some tips on dealing with negative sentiment on social?

Be open. Be honest. Negative social comments can be one of the most authentic gauges of how your product and company is perceived in the market, and an opportunity

to embrace a vocal customer to win them back. Social is a wide open feedback loop that users leverage to communicate with and change companies and products. By acknowledging the negative feedback and responding evenly and honestly, a company can build trust among its users. Companies who embrace feedback, both positive and negative, and then show progress toward addressing problems or issues often win over negative customers and turn them into loyal advocates.

## Who are the top 5 people you follow on social?

I do follow some people, but I also like social sites that provide the best thinking of a community of experts. Here are some of my favorites:

- Entrepreneurship and start up blog posts on [www.quora.com](http://www.quora.com) are contributed by people like me, and people who have succeeded at things I am attempting to do. Entrepreneurs weigh in on everything from managing product to managing the hectic life of being a Silicon Valley executive.
- Seth Godin: <http://sethgodin.typepad.com/> Seth always has ideas about people business and marketing. His ideas are often controversial, and generate good discussion.
- Leena Rao: TechCrunch  
Leena is always on top of what is happening in Silicon Valley and the technology world. TechCrunch is irreverent and unapologetically covers the industry in living color. You can learn a lot from your peers. Leena always delivers it right to my desktop
- Paul Greenberg, ZDNet  
Paul is a CRM watcher, and knows what is going on in CRM. His deep connections always surface interesting things about our partnership network and the ecosystem that InsideView plays in.
- Scott Santucci, Forrester sales enablement blogger  
Scott has his finger on the pulse of what is going on in enterprise, B2B sales and marketing. What Scott writes about is important to our customers and to the evolving market of CRM Intelligence.

Still more >

## BRIAN KELLY (continued)

### What are your top 3 tips on how to get up to speed on social?

- 1) Follow people you respect, in industries or areas that interest you. Learn from what and how they post, and also from who responds to them. Become active in discussions that are relevant to your business, and in areas that you can offer value.
- 2) Participate in communities or groups that are relevant to your users. You can learn a lot from what the community shares about your products and the other products that are in your ecosystem.
- 3) Comment on content, provided by people you respect, and engage in a useful dialogue with them.

### How important is social listening to your marketing team or marketing teams in general?

Extremely. InsideView marketing professionals use social information for precision targeting and to help guide marketing offers.

### How important is social listening to your sales team or sales teams in general?

Extremely. Our sales and marketing team manages their contact list through InsideView. InsideView provides live, active social streams.

### How important is social listening to your customer service team or customer service teams in general?

Extremely. The InsideView CSM team uses our CRM Intelligence platform to monitor company social pages and the social activity of key account contacts. This social information is important as the CSM team manages the account and engages with them to maintain account control and to grow account value.



# STEVE HIBBERD

Co-Founder & CEO, **Tiger Pistol**  
@sjh0811

## What are three key elements of an effective social strategy?

A key driver behind the approach small businesses need to take to their social activity is their short horizon when compared with mid size or large companies. Small businesses often don't have the luxury of running a multi layer marketing strategy including elements that will deliver short, mid, long term and sometimes intangible benefits, they need transparent outcomes today, this week or this month.

There are people searching for and talking about their business or category on social everyday. So getting practical, the first element they must nail is to make the organic search and conversation work for them. They need to have a social profile set up, optimized and then maintained where people search for businesses like theirs, be it on Facebook, Google+ Local via Google search, Foursquare, Yelp...

With their presence in place and optimized, the second element they must nail is to consistently monitor for reviews, comments or mentions of their business, and respond to all in a timely manner. Consistency with this element will dramatically improve their appearance in search results, as well as their 'click to call' and 'click to web' conversion rates.

Now, given their short horizon, sales today are paramount, and although this can and will occur via social search and conversation management, to stay alive and grow, small businesses often need to reach their target audience at scale in a short timeframe with calls to action that will lead to sales. Where this is required for their business, social ads are a must in their plan, however it is vital for the small business operator to not invest in social ads without a clear goal they know that spend is solely aiming to achieve.

## How has engaging your customers on social benefited your company or your clients?

Small businesses have been the greatest adopters of the established Facebook practice of posting regularly to appear in the News Feed, and similarly on other social networks. The benefit of these posts has largely been positioned as engaging with your fans and target audience.

As social networks are aggressively migrating to advertising models, these posts are no longer organically engaging fans and the target audience as was once expected, and to reach fans and the broader target audience advertising campaigns are required.

With the shorter horizon existing for small businesses, once they're investing in advertising, most need that investment to lead to sales or some measurable value creation activity, and what we have called engagement on platforms such as Facebook just won't stack up.

Small businesses can benefit from engagement of their audience without it being a click to a call to action in a post or ad, and the more progressive and active small businesses are developing an understanding of the link between those engaged and their greater propensity to respond to call to actions.

Read on >

## STEVE HIBBERD (continued)

### What are some tips on dealing with negative sentiment on social?

As has been well documented over time, the customer/prospect who speaks out negatively is doing the business a huge favor, so long as you know they're talking and respond appropriately.

We gain much delight in managing this for a large number of our customers, and frequently turn negative customer/prospects into advocates of the business. The key tips are:

- 1) Monitor effectively; it's not a set and forget, but an activity that needs regular refreshing based on changing topics of the moment, products, locations etc.
- 2) Don't be too reactive and defensive, sometimes the comment, review or mention is not directly about the business, but they are merely mentioned in the comment.
- 3) Where the comment, review or mention is about the business, ensure you respond as promptly as possible, even if it's acknowledging the comment and asking for a way to contact the customer/prospect outside of the social network at an appropriate time to gather more details.
- 4) Avoid arguing, or over clarifying, and instead acknowledge the feedback and where possible move to making the customer/prospect aware of a positive alternative or next step you can make available to them.
- 5) Where possible, track the post negative feedback behavior or the customer/prospect, and if they purchase or take up the alternative service or product you presented, reach out again and thank them.

### Who are the top 5 people you follow on social?

- Amy Porterfield: <http://www.amyporterfield.com/>
- Jay Baer: <http://jaybaer.com/>
- Nick Bilton: <http://nickbilton.com/>
- Scott Stratten: <http://www.unmarketing.com/>
- Gerry Moran: <http://marketingthink.com/>

### What are your top 3 tips on how to get up to speed on social?

Small business operators are typically overwhelmed, and lack the time to properly get their head around subjects that they don't deem core to their existence. We do however observe 3 common practices those active undertake consistently.

- 1) They speak to their existing customers about where they spend time on social and why. They then use this information to apply focus to getting their head around one or more relevant social networks.
- 2) They then become avid users of the relevant social network(s), often getting some assistance with the basics via family and friends. They personally experience how they use the networks, and how businesses interact or attempt to interact with them. This often brings with it many 'Wow, I didn't realize...!' moments.
- 3) They identify businesses that have been active on the relevant social networks for some time, usually people they know, and ask a lot of questions. This often includes looking at the social presence of competitors to sanity check what they have learnt with a relevant business they know well.



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