

## Social Media for Sales Producers Workshop Exercises

**Overall:**

**Your Approach (Lion or Archer):**

**Target Prospect Profile:**

**Influencer/Referral Source Profile:**



## Linked In:

### A: Set-up - Put your best professional face forward

1. **Checklist for a good profile.** Pull up your LinkedIn Profile page (click Profile tab) and have your partner evaluate the following, noting comments and suggestions.

(Note: Before you start updating your LinkedIn profile, you may want to turn off your activity feed so your network isn't deluged in status updates telling them you updated your profile. Upper right corner where your small photo is. Select Privacy and Settings. Select Profile Privacy Controls. Turn on/off your activity broadcasts)

- ☐ **Headline (under your name):** Do you have a compelling description, rather than just a title, on how you deliver value to your clients? For example, "insurance agent with 20 years of experience helping owners protect their businesses and their families".
- ☐ **Summary section:** Do you describe here why people do business with you? Do you include keywords that prospects use (industry and layman terms) for finding you? If you have good data from your customers, use it. For example, "With one client, we were able to save his company 50% in premiums while expanding coverage in key areas." Or you can use industry statistics like "70% of construction firms do not have enough insurance in the event of a major loss." Specialties: Tag yourself with terms that people may search on.
- ☐ **Experience:** Provide complete descriptions of your current and past positions with an eye to what prospects would be interested in: What results did you achieve for clients/employers? What expertise do you have?
- ☐ **Under Interests and then Companies:** Are you following all of your Customer Companies?

2. **Create a Custom URL.** Click on the Profile tab. Do you have a custom url (meaning [www.linkedin.com/in/YOURNAME/](http://www.linkedin.com/in/YOURNAME/))? If not, in your profile under your picture, select edit next to the URL. Then Click on Customize your public profile URL.

**Your public profile URL**

**Your current URL**  
[www.linkedin.com/in/jeannerossomme](http://www.linkedin.com/in/jeannerossomme)  
[Customize your public profile URL](#) • [View your public profile](#)

## B: Research and build your Contacts

### 3. Connect with Customers

- Choose Network and then Add Connections. LinkedIn will walk you through adding connections via your email list.

### 4. Find Prospects

- Use the Advanced Search function, which is in the top upper right next to the search bar. Go directly to the Title area and enter in the position you think your decision maker might have. For example CFO. (Make sure you select “current” right beneath it.) Then fill in other factors such as location, Industry and other relevant key words that can help you narrow down who you’re looking for. Click the blue Search button.
- Look under Relationship (left column) and see how many are in your network and those you may wish to add via an introduction (2<sup>nd</sup> connection).
- You can then save the results by clicking Save search in the top right corner. Name the search and whether you want updates weekly or monthly and click the green arrow to save.
- Some other tips: Search for companies in the “people” field to get a list of people who have worked for that company. You can then narrow by location and job title.

### 5. Research Prospects

- Click on the profile of a potential prospect.
- What is their recent activity? What projects are they working on?
  - Look at any recent postings by the company.
  - What are they responsible for and how do they describe it?
  - How long have they been in this position and with this company?
  - Where did they work before? Could that company be a potential prospect?
  - Who has given them endorsements? Are these ideas for a potential prospect?
  - What are opportunities for a personal connection – shared school, past company, shared professional connection?
- If of interest, click the star under the photo and include notes, reminders, how you met and tags.

## C: Interact

*When I reach out to people, I say something personal right away so I can create an immediate connection. I study people’s profiles carefully to find out what’s important to them professionally and personally. After doing that, I send them a message via LinkedIn with a connection request.*

*Each message is personally crafted to show I’ve done my homework. For example, I might start: “Wahoowa (our school battle cry)! Please allow me to use our UVA connection to e-meet you. I received a BS in Commerce in 1994.” Then, I’ll go on to mention:*

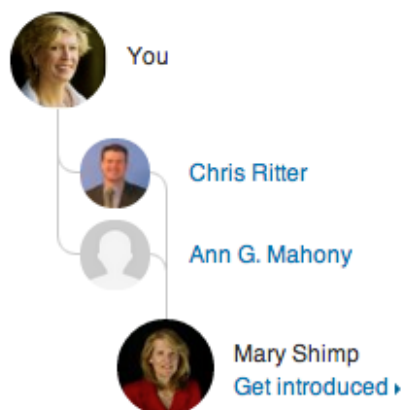
- *Something about their profile/accomplishments I found interesting or relevant.*

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- *Names of mutual acquaintances or interests.*
- *What my company does – but focus on the issues or business goals we help companies with. (It's never, ever a product pitch.)*
- *Several other companies we've worked with so they know we're a credible resource. Finally, I'll close by asking if we can connect briefly to explore if our company is a good fit for their needs.*

### 6. Connect with Prospects – Get Introduced

#### How You're Connected



#### Two ways to Connect:

- a. Via an Introduction by a Mutual Connection**
  - Look at How You're Connected (lower right column)
  - See if there are connections that may be able to introduce you. Select the connection. Send them a request note letting them know how you think you can be of benefit
- b. Directly**
  - In their profile, click connect.
  - Send them a custom invitation reminding them where you met and how you might be of value.

### 7. Attract Prospects: Participate in Groups.

- **New Groups:** Select the profile for a key prospect or customer. Scroll to the bottom and see what LinkedIn groups they participate in and that you may have an interest in or knowledge of. Select the group name and you will see a list of all members in your network. Click on the Group Name.
- **Look at Discussions.** Are they active? Does it look like you could contribute to the conversation or learn more about your target prospect group? You can click on Search and look for keywords like insurance to look at relevant discussion threads.
- **Look under Members.** Who in your network is participating?
- **Select your notifications.** On the top right corner click your small photo and then Privacy & Settings. Select Group Companies & Applications. Select Set the frequency of group digest emails. For active groups, select Daily. For others select weekly or no email.

## D: Pass on Quality Information

*We're "Go-Givers." LinkedIn groups give us a forum to do this. We participate in numerous discussions, always focusing on how we can help our targeted prospects. We give tons of free advice. We share free ebooks and free white papers from our website. Sometimes we start our own discussions by asking probing questions, and then join in*

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*the ensuing conversation. When it's appropriate, we even refer other experts and companies who could help our group colleagues with their challenges.*

## 8. **Share Content.** 3 Ways to Share on LinkedIn

1. Scroll through your home page feed to find articles to share with your contacts.
2. Use the social share buttons you see on articles as you're surfing the web.
3. Copy hyperlinks from web pages or articles and directly paste them into your LinkedIn "share an update" box.

## 9. **Set up a Social Media Calendar.** Using the attached example, fill out a social media calendar. Plan on posting at least three times per week. Ideas for Content Sources are attached.




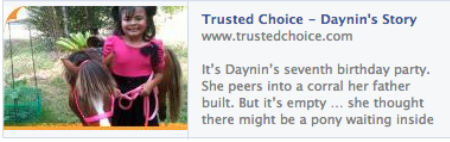
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## Social Media Content Calendar

	Type of post	Source	Target Group
Monday			
Tuesday			
Wednesday			
Thursday			
Friday			
Saturday			
Sunday			

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## Social Media Content Calendar

	Type of post	Source	Example
Monday	News story in your area of expertise	carriers, insurance publications	<p>Good stuff fans..if you own a restaurant read this...if you don't then just skip.. Ryan Hanley from The Murray Group Insurance Services, Inc. wrote this.</p> 
Tuesday	Local news, sports team, item in regular news with question to invite interaction	local news, regular news sources	
Wednesday	Fear/concerns of your clients and your solution	insurance blogs	<p>Covered if you have comprehensive coverage on your auto policy!</p> <p>Monday Funday! Here is some humor for you... If a tree falls on my car am I covered?</p> 
Thursday	Tips in your area of expertise	Business car care, home care blogs	<p>Who will win the Masters?</p> <p><input type="radio"/> Tiger Woods +5</p> <p><input type="radio"/> Rory McIlroy</p> <p><input type="radio"/> Phil Mickelson +2</p> <p><input type="radio"/> a first time major winner +3</p>
Friday	Question, poll, comic, funny story to invite interaction	original ideas	
Saturday	Fear/concerns of your clients and your solution	original insurance photos	<p>Fans! We need 7 shares of this post to reach our goal of \$2,000 of donations to Make-A-Wish America ( original goal was \$1,000 but my fan's care about donating, and rock like no other!) Let's go, and let's do this! Donate for a cause, and help achieve goals!</p>
Sunday	Support of local charity, cause or non-profit	links from charities, medical research, etc	

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## Content Sources:

- [www.Socialmention.com](http://www.Socialmention.com) to search for sources you can pass on to your groups. For example you can use “insurance and Toronto” to get the latest relevant news and articles.
- <http://www.insurancejournal.com/>
- <http://www.blitzleadmanager.com/blog/index.php/2013/top-15-insurance-blogs-for-2013/>
- <http://www.riskconversation.com>
- <http://www.businessinsurance.com/>
- <http://www.propertycasualty360.com/>
- <http://www.insurancethoughtleadership.com/>
- <http://www.linkedin.com/today/>
- <http://mashable.com/business/>
- <http://alltop.com/>



## Twitter:

### A: Put your best professional face forward

1. **Set up a Professional Twitter Profile**, Click the wheel in the top right corner and then Select Settings. Select Profile. Have your partner evaluate the following, noting comments and suggestions:

- ☐ Bio: Do you have a punchy 160-character headline of what you do and how you help others?
- ☐ Do you have your Company website or your LinkedIn public profile URL as your website?
- ☐ Click Mobile. Since Twitter is an "in-the-moment" medium, make sure alerts sent to your cell phone so you can be easily contacted. It is recommended to have Direct Messages and Mentions and replies checked. If you are active on Twitter also check Your Tweet is retweeted and Your Tweet is marked as a favorite.

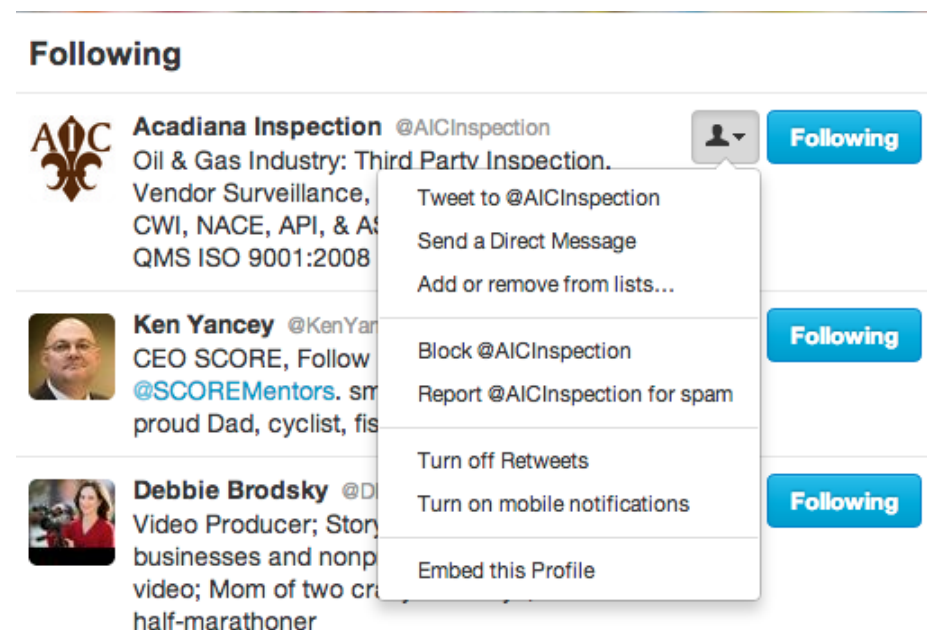
### B: Research and build your Contacts

2. **See if your prospects and customers are on Twitter**. Click #Discover and then Find Friends. Twitter will search your email lists to see who is on Twitter.

### 3. Organize your contacts by Creating lists

- Click on the wheel in the top right corner left column and select Lists. Then select Create list.
- Give a name and description. The following lists are suggested (all should be marked private).
  - Customers
  - Prospects
  - Influencers
  - Information Sources
- Click Me and then Following.
- In the Following column: Click the person icon next to each name. Select add or remove from lists.

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### 4. Research activities before a sales call

Select Home and then Following. Click on the name of any prospect or client:

- Who do they follow?
- What have they recently tweeted?
- Any insights into areas of interest or shared connections?

## C: Interact

### 5. Show subtle support by retweeting a tweet from a key prospect or customer

- Select Home and then Following and then one person you follow to see their Twitter stream
- Select one tweet, Details and choose Retweet

## D: Pass on Quality Information

### 6. Use Hootsuite to manage information and response

- Sign up for a Hootsuite account for scheduling: [www.hootsuite.com](http://www.hootsuite.com). Connect your LinkedIn, Twitter and Facebook accounts.
- Lists – Hootsuite will automatically show any lists you have. Set up streams for Prospects, Customers, Influencers, Information Sources and for Facebook and LinkedIn if you wish.
- Schedule posts in advance. In the left bar select Publisher (paper airplane icon) and then Compose message up top. You will be able to select the date and time (calendar icons) and social media networks (bar top right) where you wish to post.
- Use the Social Media calendar you created above to schedule your post for the next week or so.

## Facebook:

### Decide on your approach to Facebook from a professional use perspective.

#### 1: Low Profile: Facebook for personal use only.

Set up Facebook Personal page as follows:

- Click Home and then Edit Profile under your photo top left. In the About section, add interesting information about your background - topics you might talk about to personally connect at a networking event. Make sure you are linked to your company page under Work and Experience
- In the Contact section, include links to your LinkedIn URL or your company website.
- Set up your privacy most conservative (meaning you do not wish to use Facebook professionally) and make all Privacy settings Friends Only (see screen shot below). (To get here, click on the wheel top right corner, select Privacy Settings).

#### 2: Use Facebook to learn more about clients and prospects

- Set up Facebook personal page as above but use the following privacy settings. (To get here, click on the wheel top right corner, select Privacy Settings).

<div><div>General</div><div>Security</div><div>Privacy</div><div>Timeline and Taqql...</div><div>Blocking</div></div> <div><div>Notifications</div><div>Mobile</div><div>Followers</div></div> <div><div>Apps</div><div>Ads</div><div>Payments</div><div>Support Dashboard</div></div>		<h3>Privacy Settings and Tools</h3>	
<b>Who can see my stuff?</b>		<b>Who can see your future posts?</b>	<b>Custom</b> <a href="#">Edit</a>
		Review all your posts and things you're tagged in	<a href="#">Use Activity Log</a>
		Limit the audience for posts you've shared with friends of friends or Public?	<a href="#">Limit Past Posts</a>
<b>Who can contact me?</b>		<b>Who can send you friend requests?</b>	<b>Everyone</b> <a href="#">Edit</a>
		Whose messages do I want filtered into my Inbox?	<b>Basic Filtering</b> <a href="#">Edit</a>
<b>Who can look me up?</b>		<b>Who can look you up using the email address you provided?</b>	<b>Everyone</b> <a href="#">Edit</a>
		<b>Who can look you up using the phone number you provided?</b>	<b>Everyone</b> <a href="#">Edit</a>
		<b>Do you want other search engines to link to your timeline?</b>	<b>Off</b> <a href="#">Edit</a>

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## Research activities before a sales call

- What are their interests, family, common friends, what they like (in their news feed)?
- What companies and organizations do they like?
- Share updates from your Company page on your personal page that may be of interest to general consumers.

## 3: Use Facebook as part of your approach to connect with prospects and clients

- Set up your privacy settings <http://financialsocialmedia.com/professional-facebook-privacy-settings/> and organize prospects, clients and friends into groups. Send posts based on groups.
- “Like” pages for Community and Local organizations for Word of Mouth such as Alumni clubs, neighborhood organizations, local government, church and school organizations. Posts from these groups will then appear on your timeline. You can then be open to questions that you may be able to answer.
- Share updates from your Company page on your personal page that may be of interest to general consumers.
- Post or share information on community events, charities, other organizations.
- Share pictures of your company’s community involvement.

## Social Media Daily Habits:

### Daily:

- ☐ Set aside 1-3 time chunks to monitor social media feeds (15-30 minutes) preferably early morning, lunchtime and work close.
- ☐ Are current customers expressing any discontent or confusion that you can address?
- ☐ Set up alerts to your mobile device so when you get a new follower / fan or a retweet, send a message of thanks.
- ☐ Comment on changes or updates with companies, prospects and clients.
- ☐ Like, share or retweet posts from referral sources, prospects and clients to maintain a light touch.
- ☐ Respond to any questions in your LinkedIn groups.
- ☐ After face-to-face meetings and networking events, follow up via social media.

### Weekly:

- ☐ Check on last week's posts – what posts seemed to get the most interaction?
- ☐ Set up a constant weekly content stream. Spend 30-45 minutes per week finding content to share and then schedule in Hootsuite.
- ☐ LinkedIn groups: Once a week start conversations such as pasting a link to an article: "This is an interesting article about \_\_\_\_ and I'd love to get your thoughts on it. I hope you get as much out of it as I did."
- ☐ Keep on top of your Competitors:
  - LinkedIn: Whom are they linking with?
  - Facebook: See what they are posting and what applications they are using.
  - Twitter: Who is complaining about them and why?

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## Resources:

- Examples of LinkedIn profiles <http://www.linkedin-makeover.com/linkedin-profile-samples/>
- To decide in the Premium version of LinkedIn is right for you read here: <http://www.linkedin-makeover.com/2013/06/12/why-pay-for-linkedin/>
- Create a LinkedIn Email Signature <http://www.linkedin.com/signature?display> for Outlook and Mozilla.
- Great tips and case studies on sales people using LinkedIn <http://www.jillkonrath.com/sales-blog/bid/147344/FREE-eBook-LinkedIn-Sales-Secrets-Revealed>
- Great guide on how to Use Twitter for Social Selling [http://learnmore.insideview.com/TheUltimateGuide\\_Twitter.html](http://learnmore.insideview.com/TheUltimateGuide_Twitter.html)