

# How to Use HootSuite for Social Selling

Social selling is a new concept that when added to a traditional sales process can help you rack up leads and close deals. The challenge for busy sales people is how to incorporate social selling into an existing workflow. HootSuite can help you consolidate many of your social selling actions and execute a routine that you can work into your day without disruption. The goal of this guide is to show you how using HootSuite for social selling can help you:

- Eliminate cold-calling
- Utilize next generation prospecting methods
- Go beyond email campaigns and mailing lists
- Become a successful micromarketer and build your personal brand

At the end of this document, we have included a 30 minute sample action plan that you can build into your daily routine. First, here are 26 ways you can use HootSuite to crush your quota.

## Set up your Dashboard

In order to get yourself into a regular social selling routine, it's necessary to take a few quick steps to set up your HootSuite dashboard. Once your dashboard is customized for your sales workflow, you'll be able to execute your daily activities efficiently. In this section, we'll show you which tabs to create in your dashboard, and which streams to put in each one.

**1. Create a new tab** called **Admin**. This tab will be where you will be able to see everything that needs responding to on a daily basis. This tab should include your 10 most important streams that require daily attention. Must haves include your Twitter Retweets, Mentions, and Direct Messages. Each of these streams will be populated with Twitter messages that you'll want to respond to. You should also **add streams for each of your most important LinkedIn Group discussions**.

**2. Create a **Prospecting** tab.** In the Prospecting tab, create streams for your private Twitter lists of accounts you want to monitor for sales opportunities. Example lists could include the Twitter accounts of prospective companies, decision makers, or champions within your targeted organizations.



### What are Tabs?

Tabs are how you group and organize your streams in the HootSuite dashboard. They can be reordered, renamed, or deleted. You can include streams from Twitter, LinkedIn and any other supported apps or networks in the same tab. Organize your tabs to suit your workflow and save time.

### What are Streams?

Streams are columns of messages that you can view side-by-side in a tab. You can have up to 10 streams in each tab.

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In addition to your list streams, create Twitter search streams for key terms in your space. If you sell kitchen equipment, your search terms might be “commercial appliance” or “need freezer”.

**3. Create a Competitors tab.** In this tab, you should include search streams for your major competitors’ main Twitter handles and their customer support handles. For example, a search query “from:@CompetitorX” returns all tweets by CompetitorX while a regular search for “CompetitorX” returns all mentions of CompetitorX. Monitoring competitors allows you to see who they are talking to and identify opportunities. You can also create a private Twitter list to monitor salespeople who sell competitive or complementary products in your space.

**4. Create a Content tab.** In this tab you will set up various streams to follow bloggers and influencers in your space, Twitter hashtags, and content curation apps like Zuum, Trendspottr and RSS. See tips 24-26 for ideas to populate this tab.

### Real-Time Listening

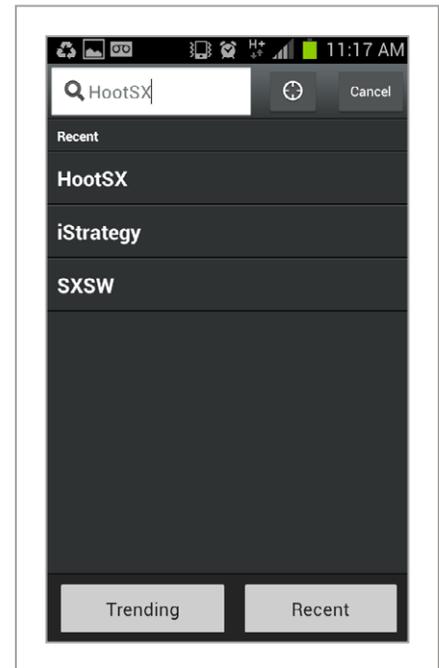
Buyers and competitors are on social searching for information and are talking about your products and your space. These activities will help you keep a pulse on this info in real-time and provide the opportunity to connect with context.

**5. If your sales team is structured geographically, salespeople can use location specific searches called geosearches, to hone in on who is saying what within each territory or major markets. [Geosearch](#) your territory with key industry terms (Example: “Marketing Automation Software geocode:24.43,56.43,50km”). This can help you find out if anyone in your territory is asking questions about your solution or giving off other early stage buying triggers.**

**6. When you go to a conference or tradeshow, use your HootSuite mobile app to do a geo-search for nearby tweets. If you want to see every message in your area, leave the search field empty and simply press the “target” icon next to the search box. To add even more relevance, search for the hashtag of the event you are attending, and then press the “target” icon. This will allow you to see who is tweeting around you and offers the opportunity to reach out to other attendees around you far quicker than you can do through face-to-face meetings alone. By the time the conference is over, you’ll have dozens of new, quality contacts with people in your space.**

#### Private Twitter Lists:

Always keep your Twitter lists private, so you can fly under the radar. Twitter lists are attached to a particular Twitter account, not your HootSuite account, but you can create and maintain lists from within the dashboard.



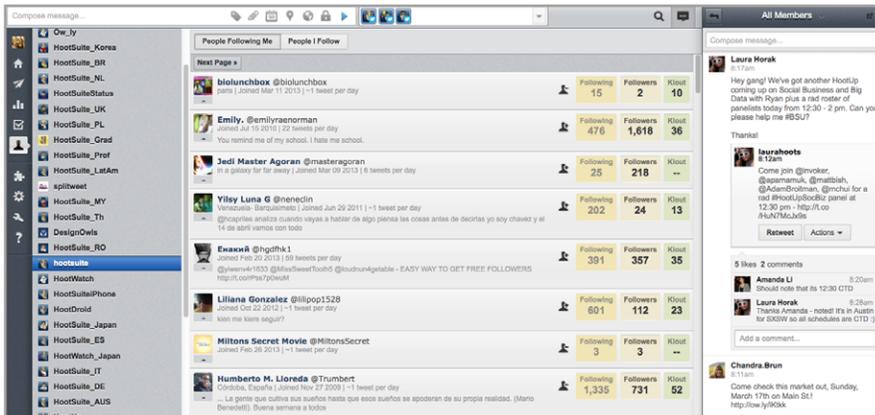
Geo-targeted search on HootSuite mobile.

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## Prospecting 2.0

These techniques are designed for you to adopt prospecting activities focused on Buyer 2.0 and their new behaviors. Buyers are spending a significant amount of their time on the social web, leaving a trail of breadcrumbs for attentive sellers to follow. Use these techniques to complement your existing prospecting routine.

7. Check your contacts screen by clicking the icon in the navigation bar. This will show you people who have recently followed you and if you're following them back. The "+" sign means you can follow them, while the "-" means you are already following them. Check this daily to see if any prospects or potential leads have recently followed you. You can click their name at any time to gain further insights about them.



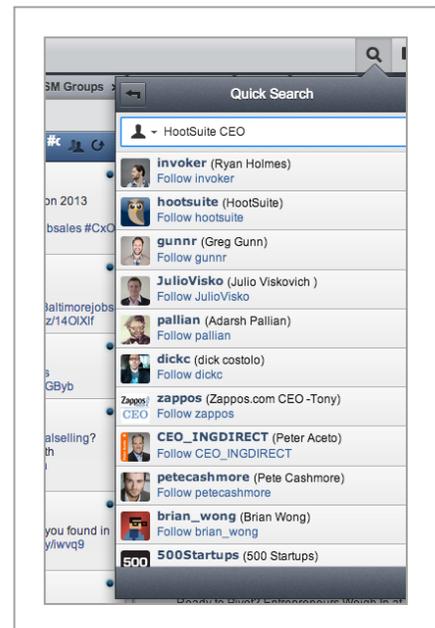
8. Use [ow.ly](http://ow.ly) to shorten links that you send to your prospects (yes, even via email). You can track the statistics for click-throughs on every unique [ow.ly](http://ow.ly) link from within the HootSuite dashboard. You can see when they clicked on the link and which country they were in when they clicked on it. If multiple clicks occur from multiple locations, you know they shared this and found it valuable. [Learn how to check click stats on your links.](#)

9. Find prospects by using the **Find Twitter Users** search option. It searches through bios and allows you to find people by company and position on Twitter. This method is also useful when you're looking for sales reps from competitors.

“Want a head start on your competition? Then use HootSuite to listen for the Trigger Events that put you in front of decision makers before your competition.”



- Craig Elias  
Creator of Trigger Event Selling



Find Twitter Users search option

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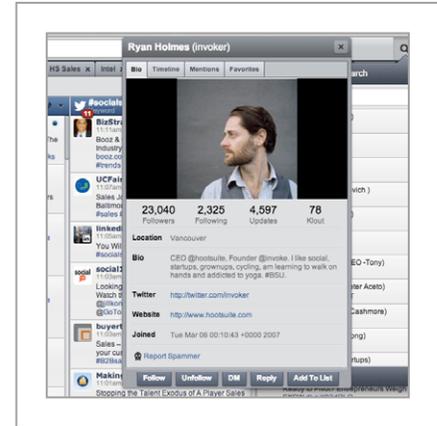
10. Click on a Twitter user's picture to open their profile in the HootSuite dashboard.

The profile pop-out has 4 tabs: Bio, Timeline, Mentions, and Favorites. Use all 4 of these tabs to get a fuller view of your prospect.

- In the **Bio** tab, you can see your prospect's Twitter bio, which usually includes his or her company and position. Twitter bios also reveal your prospects' interests, which you can use to personalize your outreach. Also look for any hashtags your prospects include in their bios. This will help you discover new terms to monitor in your Twitter search streams.
- In the **Timeline** tab, you can see your prospect's most recent tweets. Reviewing someone's timeline not only gives you perspective on their personality, interests and professional role, but also allows you to discover opportunities to retweet or respond to their messages. A retweet is a non-invasive way to let a prospect know you're paying attention and to put yourself top-of-mind.
- In the **Mentions** tab, you can see who else is publicly engaging with your prospect. Although you won't be able to see their private Direct Messages, you will be able to see if they're having open discussions with any competitors or complementary vendors. This will give you an idea if they have budget allocated for purchasing decisions and give you an opportunity to join the conversation.
- In the **Favorites** tab, you can gain insight into your prospect's interests by seeing what kind of tweets they have favorited. For example, if your prospect has favorited numerous tweets about a particular sports team, you have context upon which to build a relationship.

12. As you find and encounter prospects on Twitter, **drag/drop** their profile picture into the applicable Twitter list stream to have them automatically added to this list. You can also add them to a list by clicking on their profile picture and selecting "Add To List". Collecting your prospects into lists will help you monitor for early stage triggers, and establish a trusted and valued relationship with them.

13. Click on a LinkedIn user's picture to open their profile in the HootSuite dashboard. Like the Twitter profile pop-out, this pop-out has 4 tabs: Bio, Experience, Education, and Updates. Again, use all 4 of these tabs to understand your prospect. While Twitter is an open window on your prospect's personality, LinkedIn offers a comprehensive view of his or her professional life.



Twitter Bio

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**13. Set up a stream for a LinkedIn job search** for key positions that are involved in the buying process or that signal a trigger event such as departmental expansion. For example, if you sell marketing software, a LinkedIn job search for the terms: “digital strategist” + “New York” will give you all of the LinkedIn Job postings in New York for digital strategists. This allows you to determine who is ramping up their marketing department, will be looking to make changes in the near future, and has budget for growth.

**14.** If you use Google Alerts to receive updates about your prospects and their companies, make your Google Alerts accessible as RSS feeds and then add them to your dashboard through the RSS Reader app. Now you will be notified of trigger events directly in your dashboard.

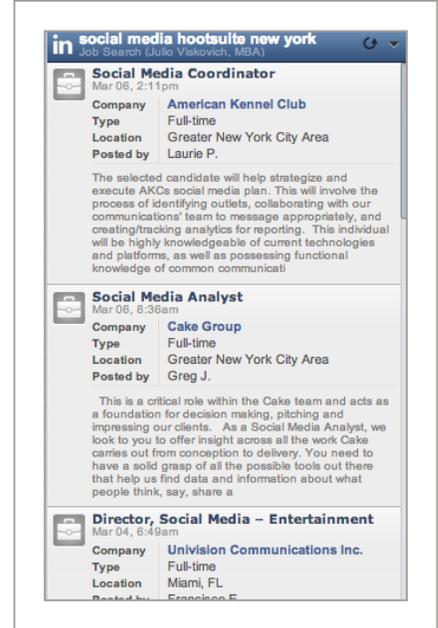
### Connect and Stay Relevant

Use these techniques to stay relevant during the dark periods of the sales cycle. Stay top of mind and be everywhere your prospects are looking for information.

**15.** Use the HootSuite publishing scheduler to make the best use of your time. Work a time into your daily routine to queue up content for the rest of the day. If you only have 15 minutes for this, discover your content and then let AutoSchedule space choose the optimal time to publish.

**16.** Make sure to use the integrated link shortener in the HootSuite Compose Message box when sharing links to your social networks. This will not only shrink your links into shorter ow.ly URLs (freeing up more space to use in your messages), but make them trackable through analytics. By seeing how many click-throughs your links get, you can determine what kinds of messages resonate with your audience, and what times of day are best for reaching them. [Learn how to shorten links.](#)

**17.** Maintain a good ratio of valuable messaging. For example, you could follow the 10-4-1 rule: share 10 links to third-party industry articles, 4 links to company blog posts/content, and one link to a company landing page each week. Following a rule like this ensures you never become too salesy or appear biased. Social media is not for hard selling and people will tune anyone out if they take this approach. Using this formula is a good best practice.



The screenshot shows a LinkedIn job search stream for 'social media hootsuite new york'. It lists three job openings:

- Social Media Coordinator** (Mar 06, 2:11pm) at American Kennel Club, Full-time, Greater New York City Area, posted by Laurie P. Description: The selected candidate will help strategize and execute AKCs social media plan. This will involve the process of identifying outlets, collaborating with our communications' team to message appropriately, and creating/tracking analytics for reporting. This individual will be highly knowledgeable of current technologies and platforms, as well as possessing functional knowledge of common communication.
- Social Media Analyst** (Mar 06, 8:36am) at Cake Group, Full-time, Greater New York City Area, posted by Greg J. Description: This is a critical role within the Cake team and acts as a foundation for decision making, pitching and impressing our clients. As a Social Media Analyst, we look to you to offer insight across all the work Cake carries out from conception to delivery. You need to have a solid grasp of all the possible tools out there that help us find data and information about what people think, say, share a
- Director, Social Media - Entertainment** (Mar 04, 6:49am) at Univision Communications Inc., Full-time, Miami, FL, posted by Francisco F.

LinkedIn Job Search

“Social selling is not chit-chat. It’s leveraging relationships and insights to create a better buying experience.”



- Ralf VonSosen  
LinkedIn

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**18. Add LinkedIn Groups** that your prospects are likely to be involved in, or will go to when seeking information about your solution and space. HootSuite allows you to listen and engage in multiple LinkedIn conversations in one spot. Follow all of the LinkedIn groups that your prospects are using and jump into the conversation by responding to their messages directly in your streams. You can also save time by publishing messages from the Compose Message box to any and all of your LinkedIn Groups at once.



“HootSuite is the absolute best tool to monitor specific trigger events in our target market. The tool allows me to isolate keywords, trending topics, articles of interest, and key prospects. With one tool, I have a 360 degree vantage-point on all key discussions I’ll need to start engaging conversations.”



- Jamie Shanks  
Sales For Life

**19. Use Drafts** to collaborate with Marketing. Marketing can draft pre-approved social messages for sellers to use at various stages of the buying process or for prospects in specific industries or roles. Empowering Marketing to provide great social content for the sales team will go a long way in helping build value towards a trusted advisor status. Make sure that you’re maintaining your authenticity and only use drafts when it makes sense.



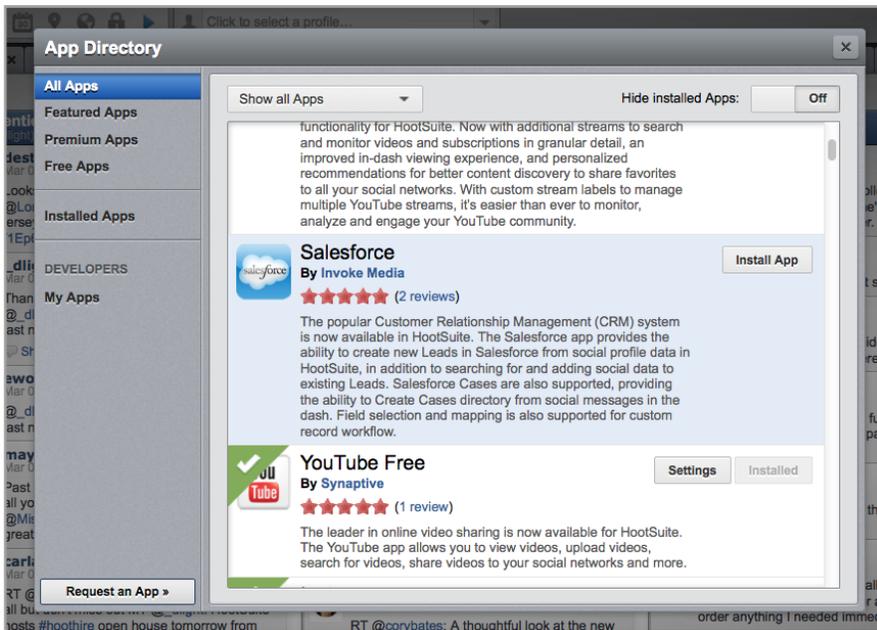
“HootSuite is the ideal app for social selling. The ability to easily track and schedule messages allows individual sellers to act like “mini-marketers”. The result of a social sales force is a much larger social footprint than the Marketing Dept. alone could create.”



- Kurt Shaver  
Sales Foundry

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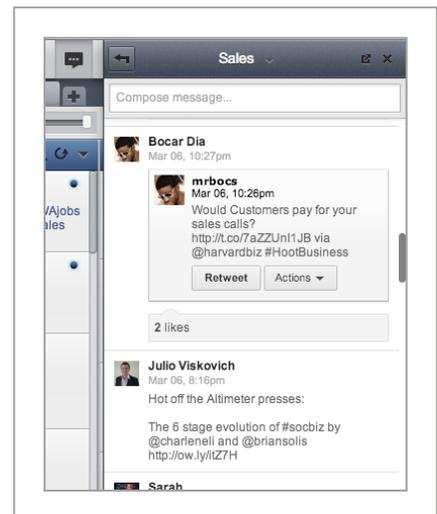
20. Socially surround your buyers by taking advantage of HootSuite’s robust integration of networks and CRM apps to increase the number of touchpoints and to stay relevant. Social is not about just LinkedIn or Twitter. It’s about connecting where your prospect is, whether it’s Facebook, YouTube, Google+, Xing, RenRen, or any other domestic or global social network. Connect HootSuite with your CRM (Nimble, Batchbook, and Salesforce) to see all the pertinent information about your prospect logged in your CRM.



21. Activate the Salesforce plugin in the HootSuite App Directory. This will bridge your traditional Salesforce usage and your social selling activities in HootSuite. Use the Salesforce plugin to:

- Create new Contacts, Cases and Leads in Salesforce from Twitter and Facebook social profiles and messages you discover within the HootSuite dashboard.
- Update information for existing Salesforce Contact and Lead records without leaving the HootSuite dashboard.
- Map custom Salesforce fields to social profile data and social message data in HootSuite for a seamless workflow.

22. Use HootSuite Conversations to get the right help at the right time from your internal braintrust. Coordinate in real-time with your manager, sales engineer, senior account executive, marketing, product experts or anyone else in your organization who can contribute to closing the deal.



HootSuite Conversations

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## Become a Trusted Source

These activities are designed to help you find and share content that is valuable to your buyers, and will help you move from a vendor to a trusted advisor in the minds to your prospects. By consistently sharing quality content and commentary, you'll build your personal brand online. Before you know it, buyers will be searching you out for advice on important issues in your space.

**23.** Install the [Hootlet extension for Chrome or Firefox](#). When you discover valuable web content for your prospects and customers, you'll be able to share it right away without even having to open up the HootSuite dashboard. The Hootlet will allow you to open up the Compose Message box directly from any webpage. Schedule your posts for a specific time or let the AutoSchedule tool work its magic. This browser extension will save you time by letting you share content right from the source as soon as you discover it.

**24.** Bring your RSS experience into your Content tab using the RSS Reader in the HootSuite App Directory. You can customize and add as many blog and RSS feeds as you like. Share content that your prospects will find valuable, directly to your social networks from your dashboard's RSS streams.

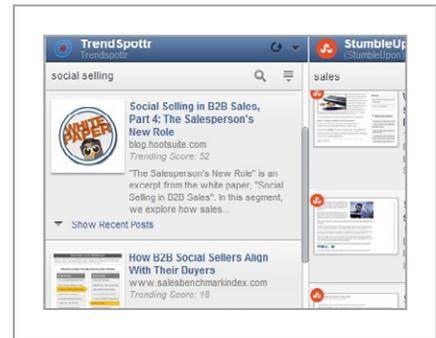
**25.** [Create keyword streams](#) for hashtags to help you aggregate information about your space. Each keyword stream can track up to three different words or phrases, so you can group similar hashtags into the same stream. You don't need to include the “#” symbol.

**26.** When creating search streams for topics that interest your prospects, add “[http://](#)” to your search query. Doing so will filter your results to only include tweets with links in them. This will ensure you are only getting news sources and save you time as you look for content to share with your prospects and customers.

**27.** Install content discovery apps from the App Directory such as YouTube, Trendspotttr, Zoom and StumbleUpon. Add custom search streams from each of these apps to your Content tab so that you will be able to quickly discover videos, articles and infographics that are valuable for your prospects. When you find an item worth sharing to your contacts, share it directly from your stream or schedule it to go out at a more opportune time.

### What's the difference between a keyword stream and a search stream?

Keyword streams are for hashtags (up to three per stream) and search streams are for [advanced searches](#).



Install content discovery apps from the HootSuite App Directory

If you're not already using HootSuite as your social selling solution, sign up today for a free HootSuite account.

### HootSuite Pro

Want to turn your team into a social selling machine? HootSuite Pro gives you control of unlimited social media profiles and empowers up to 10 users of your team.

### HootSuite Enterprise

To create a powerful inside sales force and maximize the reach and efficiency of your social selling efforts, request a personalized demo from one of our Account Executives at: [enterprise.hootsuite.com](http://enterprise.hootsuite.com)

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### 30 Minute Social Selling Daily Action Plan:

This is a sample routine that you can use as a model for your daily social selling activities. As you become more comfortable with social selling you will be able to modify or expand this routine to fit your needs. To start, use the 10-10-10 rule to divide your time among connecting, content discovery, and intelligence gathering.

Time	What	Why	How
10 min	<p><b>Connect</b></p> <p>Check your Admin tab for messages or opportunities to engage genuinely, and respond back to any social communications.</p>	<p>This allows you to quickly see everything that is important and that may need responding to in one spot.</p>	<p>Create an admin tab and put the 10 most important streams that require frequent attention and check it daily. Examples include Retweets, Mentions, Direct Messages, LinkedIn Group discussions, and other applicable channels you use. <a href="#">Learn how to create a tab.</a></p>
10 min	<p><b>Become a trusted source</b></p> <p>Go to your Content tab and select news and updates that your prospects will find helpful and valuable. Schedule these messages to go out throughout the day and to your different social channels.</p>	<p>Customers are 60% or more through the sales cycle when they first talk to a salesperson. Make sure that they're finding content that is favorable for you during their early stages. Offer content that genuinely gives value and makes your prospects smarter. Give them a reason to buy from YOU.</p>	<p>Create a Content Tab and populate this tab with content discovery streams. Add tools like Trendspotttr and Zuum from the app directory that curate content, set up RSS feeds to trusted blog sources and Google Alerts, and set up searches for applicable hashtags. <a href="#">Learn how to add apps.</a></p>
10 min	<p><b>Gather Intelligence</b></p> <p>Check your Competitors and Prospects tabs for quick hits of intelligence such as who your competitors are talking to and what your prospects are saying or looking for.</p>	<p>Find early stage buying trigger events, get to know your prospects' needs better, and stay up to date with developments in your space.</p>	<p>Create Twitter lists for prospects, customers, competitors, influencers, and more. You can even add competitive sales reps in your territory to see who they're talking to. Make lists like this Private. <a href="#">Learn how to build Twitter lists</a></p>