

Break Through The Hype Of Social Selling

How To Successfully Enable Your Sales Teams To Utilize Their Social Networks

by Peter O'Neill

July 28, 2015

Why Read This Report

Despite the promises of social selling's profound impact on sales processes, sales and marketing professionals tell us that they don't know how to get started with a formal program that will deliver worthy results. It's time for B2B marketers to help their sales teams break through the hype by taking a mindful approach to social selling. Marketers need to team with their sales counterparts to implement a balanced program that will provide the sales organization with realistic guardrails and quality content, while allowing them the flexibility to engage on social channels in a way that is most relevant to their professional networks. This report discusses the key elements of a successful social selling program and best practices from B2B marketers who have implemented them.

Key Takeaways

B2B Marketers Must Look Beyond The Hype

There's an overwhelming volume of articles, blogs, and presentations on how social selling can transform the way salespeople interact with prospects and customers. But much of this content sugarcoats what is required to launch a formal social selling program that will deliver long-term results. B2B marketers must look beyond the social selling hype and partner with their sales team to determine a realistic approach.

Enablement Is Critical For A Successful Social Selling Program

Mandating that your sales teams use their social networks to meet sales goals will ultimately backfire. Instead, you must partner with your sales organization and put processes, tools, and content in place that will enable them to tap into their social networks without making dramatic changes to their existing workflows.

Assess Your Social Marketing Maturity Before You Implement Social Selling

If you are in the early stages of using social media, you will have to spend significant time ensuring that your company's culture, organization, strategy, and data capabilities are adequate to launch a social selling program. You will also need to determine which capabilities your sales team lacks and put a plan in place to develop their capabilities before you design your program.

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Forrester interviewed four vendor and user companies: Hootsuite, Oracle, Reality Works Group, and rFactor.

Related Research Documents

[Evaluate Your Social Marketing Capabilities](#)

[Nurture Thought Leadership To Nurture Your Brand](#)

[The POST Process Drives Social Success](#)

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The Promise Of Social Selling Can Lead Marketers Down A Rocky Path

Social selling, the use of social network connections for reaching prospects and engaging with customers, is the new shiny object of social marketing. Google the term “social selling,” and you will get more than half a million results that include many articles conveying a false sense of urgency, experts telling B2B marketers and sales professionals to jump on the social selling bandwagon, and numerous “how to” guides oversimplifying what it takes to get a social selling program off the ground.¹ Forrester has helped several companies with their social selling strategies and also interviewed several other enterprises about their experiences.² Here is what we’ve learned.

Industry Hype Leads To Misperceptions

This fire hose of inconsistent information has resulted in a flood of common erroneous perceptions that social selling:

- › **Can be initiated in a few simple steps.** A comprehensive social selling program can take years to develop, especially if you are in a regulated industry. Marketers spend considerable cycles educating key stakeholders on the value of social media, training the sales team on how to use their social networks, and putting the right tools and processes in place to support a social selling program that will improve the bottom line. For example, one financial services company launched a pilot with 50 advisors in 2012 before launching a formal program in 2014. An assistant vice president (VP) of market development told us, “I was surprised with the length of time it took for this journey.”³
- › **Should only be led by sales.** A dangerous assumption! Although publications on social selling primarily target sales professionals, the reality is that sales cannot successfully implement a social selling program alone. For example, a marketing leader admits that her sales team has been left “on their own” to use social and that her company is just realizing that they need to better “harness” those activities to drive optimal results. A VP of digital enablement of a global financial services firm states that cross-functional collaboration is critical. The digital enablement team co-created a social selling strategy with the firm’s business units and provides social selling guidance and coaching to sales.
- › **Is a one-size-fits-all tactic.** Every tactic depends on the customer! Social selling in an office supply company will appear quite different from social selling in an insurance company, because the buyers’ preferences are different. Also, a company’s culture, employees, customers, and processes will shape the adoption of a social selling program. A VP of social business strategy from a North American bank states that its social program focuses solely on distribution of marketing content through its wholesale division. Unlike other businesses, the bank does not have a formal social selling program.
- › **Is the panacea for meeting challenging sales objectives.** A dangerous assumption indeed! As much as everyone would like social selling to be the cure-all for aggressive sales goals, it is not. Social selling should complement existing sales processes by leveraging the salesperson’s

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social networks. A VP of digital enablement recommends that companies bring social into sales conversations to enhance, not replace, the sales team's existing activities. He recommends that salespeople use their social networks to scale what they already do and use social media to deliver more insights that will help them drive the sales funnel. A realistic approach helped the VP's company set the right expectations for its social selling program.

Enablement — Not A Mandate — Is The Key To Success

Despite all of the current hype, social selling can transform the way companies engage with prospects and customers as long as they adopt a balanced approach. A common thread across all of the social selling programs we assessed for this report was that social selling was not presented by marketing professionals as a mandate, but instead was developed over time until the sales team embraced these tactics as an effective and efficient way to contribute to their sales objectives. Forcing social selling will backfire, especially if your sales organization is not proficient with social media or is skeptical about using social channels at all.

Instead, think about how your marketing team can provide the content, processes, support, and tools to facilitate sales' use of social networks for prospecting and nurturing. This approach requires three main steps: mapping out your social media strategy; building the key components to a successful social selling initiative; and providing content that fuels the program.

First, Use Forrester's POST Methodology To Map Out Your Strategy

It is tempting to jump straight into choosing technologies that will help sort out your social selling processes, but advanced marketers tell us this is a fatal mistake. Before you can launch a structured social selling program, you need to craft a long-term strategy and get buy-in from key stakeholders.⁴ Creating a strategy requires that you:

- › **Start by determining how your buyers use social channels.** Gather insights on how your audience behaves on social media channels and what types of social networks they frequent. Forrester's Social Technographics® and your own surveys can provide intelligence to help gauge the impact social will have across the customer life cycle. Anneke Seley, CEO and founder of Reality Works Group, states, "You need to understand where your buyers are and want to be, then shift and develop your social selling strategy to cater to them." Understanding where your target audience interacts will help you identify where you should invest your time and resources. This stage forms the "P" (for people) stage in Forrester's POST social media method (see Figure 1).
- › **Identify your objective for using social channels.** Determine what your priority will be for using social channels: Are you trying to reach new audiences on social channels? Do you want to provide more depth to encourage exploration of your products? Do you want to grow deeper relationships with your existing customers? Once you determine your objective, make sure that it matches how your audience prefers to use social (see Figure 2). For example, a financial services brand

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prioritized a relationship objective: “We decided to build relationships by helping the sales team know how to listen to social signals. For example, if a connection posts that she recently got a promotion, it triggers a conversation with a sales rep about how to help invest her extra income through financial planning services.”

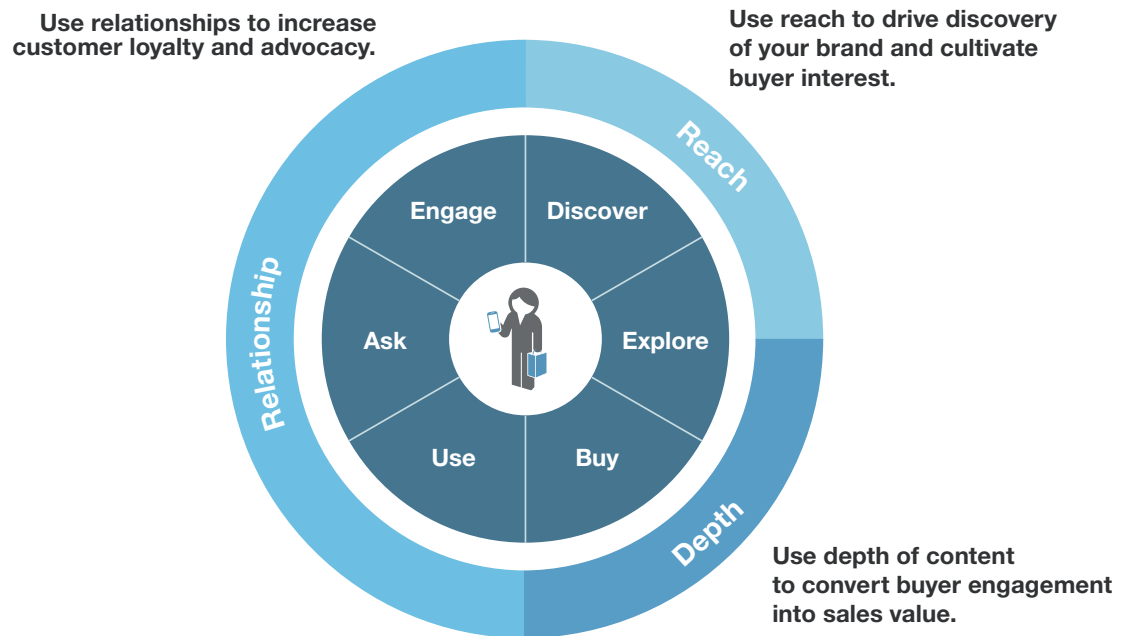
- › **Create a strategy that reflects your audience’s social profiles and your objectives.** Select the tactics that are the best match for your objective and audience. If your audience prefers to engage with companies on Twitter, make this core to your social selling strategy. But before you proceed with a social selling program on Twitter, you also need to determine if your sales team is comfortable using Twitter for customer engagement. If not, reassess your strategy or put in place a training program to teach them how to use Twitter in an optimal way.
- › **Lastly, choose technologies that will implement your social selling strategy.** Once your strategy is in place, you’ll need to evaluate technologies that will help you implement it. Vendors like rFactr and PeopleLinx provide platforms that support social selling processes. In addition, rFactr, as well as Hearsay and Hootsuite, provides a social relationship platform to manage social content that is shared across sales’ social networks. And LinkedIn’s Sales Navigator tool helps sales teams use their LinkedIn connections to identify opportunities.

FIGURE 1 Use POST To Set Your Social Selling Strategy

P	People Review the Social Technographics® score of your audience.
O	Objectives Decide what your marketing goals are.
S	Strategy Determine which social tactics best match your people and objectives.
T	Technology Choose the vendors and tools that best support your plans.

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FIGURE 2 Prioritize Your Social Marketing Objectives**Second, Combine Four Elements That Catalyze Social Selling**

Once you have set your strategy and received buy-in from your key stakeholders, you are ready to enable your sales team to practice social selling. Through our interviews with marketing and sales professionals, we identified four key elements that drive a social selling program (see Figure 3):

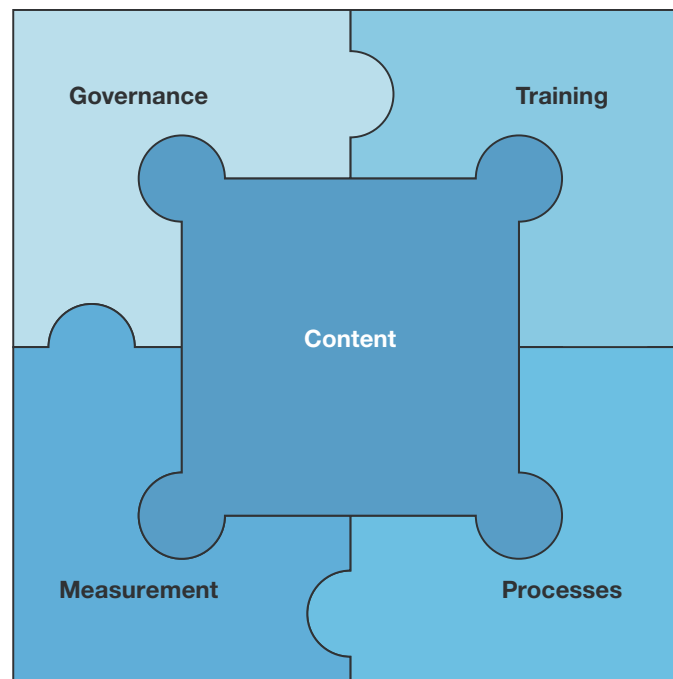
- › **Governance sets guardrails that mitigate risk.** Guardrails help your legal and sales team feel more confident with using social media. One assistant VP of sales told us: “In a highly regulated industry, advisors want to ensure they are compliant in their social media activities. Guidelines were welcomed.” An assistant VP of market development had to work closely with her legal and compliance teams to make them comfortable with allowing advisors to do social activities, including risk assessment and approvals. Today, guidelines are in place to manage advisors’ existing activity, and the company conducts regular audits of its sales team’s social media profiles to ensure compliance.
- › **Training develops social capabilities.** Training is mandatory to develop your sales team’s social media capabilities, but it must be ongoing and include frequent check-ins. A director of digital enablement at a financial services firm advises to “meet with your sales teams one on one and in a group setting to encourage peer learning opportunities. Break social down by emphasizing that it is something they already do. Show them how to establish their own unique brand, network and build relationships with clients and prospects, gather customer and partner insights, and engage

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their network with valuable and shareable content.” rFactr’s founder agrees: “Hosting one training session and then hoping the sales team follows through won’t work.” Marketers find that regular communications and easy-to-digest training videos help the sales team stay current.

- › **Processes make actions repeatable.** One of the greatest challenges to program adoption is convincing your sales team that social selling won’t bog down their existing processes. Rob Begg, VP of enterprise strategy at Hootsuite, states, “Even if sales loves your social selling program, there is a concern about distraction.” To facilitate adoption of a program, marketers must articulate how social selling can be baked into sales’ existing day-to-day processes. It’s critical to create models and processes that streamline sales’ workflows and help them become more efficient and productive.
- › **Measurement tracks results and best practices.** Although measurement is required to determine the full impact of a social selling program, a VP of business strategies at a North American bank advises: “Don’t rush the metrics. Timing of metrics is key, but don’t start too early. This puts too much pressure on the sales team.” Once the sales team has a social selling program up and running, it can start to benchmark social interactions (such as liking, commenting, and sharing). Develop more sophisticated measurement when your organization’s social marketing capabilities have matured.

FIGURE 3 Four Elements Catalyze A Social Selling Program

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Third, Provide Content That Fuels The Program

Marketing and sales professionals tell us that a strong content strategy is core to a successful social selling program. But few feel that they have mature capabilities in this area, especially for a formal social selling program. To craft a quality content marketing program:

- › **Develop thought leadership content.** Marketers find that thought leadership content outperforms product-oriented content, achieving up to 6% engagement rates, when it's shared on social media channels.⁵ Create content that showcases your employees' expertise in a relevant topic, and encourage them to blog or post an article on LinkedIn, Twitter, or other relevant social networks.
- › **Leverage existing branded content.** Repurpose your existing content by breaking it down into digestible morsels that your sales team can easily share with their social network contacts. For example, a content marketing vision may be to repurpose the best branded content and create social-friendly content, such as short-form video and infographics.
- › **Put it in a sales-friendly format.** Curate content in a format that your sales team can easily review and distribute through their social networks. For example, a financial service brand provided a weekly digest of usable content that is now published in a Hearsay library where sales can access it. About a dozen pieces of fresh content are posted every week.

Recommendations**Assess Your Social Marketing Maturity Before You Proceed**

Diving into a social selling program without first validating your social capabilities in culture, organization, strategy, and data will ultimately deliver disappointing results.⁶ B2B marketers should assess their strengths and development areas. Do this to determine whether you are in the repair, elevate, optimize, or differentiate stage, so you can set realistic expectations about what you and your sales team can achieve:

- › **If you are in the repair stage, pilot a program and learn from it.** If you are in the repair stage, you are in "startup mode" and need to get the fundamentals in place. First, increase your sales teams' social media knowledge and skills through mentoring and training. Second, establish basic guidelines so sales knows what to do (and what not to do) when it comes to social media channels. Then launch a small pilot to test different tactics. Many companies have successfully launched a formal social selling program through this approach. For example, after conducting a 12-week pilot, financial advisors at one company generated 257 leads and 33 sales. These results provided a springboard to getting the extra resources they needed to scale the program.

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- › **If you are in the elevate stage, present a social selling business case.** Once you start seeing consistent and positive results, you'll be ready to increase visibility of your efforts to other stakeholders in the company. Build a business case to articulate the value that a social selling program will deliver to the organization. Present your case to key stakeholders you need to support your program. B2B marketers who have launched social selling programs find that executive champions help drive the change required to scale these programs across the company.
- › **If you are in the optimize stage, scale your programs to other teams.** Getting to this stage can take years if you are in a regulated industry. But a long-term investment in social selling will pay off. One company started a pilot with 50 financial advisors and expanded its program to 3,900 advisors — but it was only able to achieve this after its internal processes were working like a well-oiled machine. The payoff was significant. The company attributed over 65,000 leads to its social media efforts, which helped persuade key stakeholders to make social selling fully embedded into its sales and customer relationship management (CRM) processes.
- › **If you are in the differentiate stage, launch a social selling university.** The few companies that have reached this stage have significantly altered their sales enablement processes — for the better. Marketers at this stage have fine-tuned their social content strategy and are joined at the hip with their sales counterparts who have made social selling a critical component of their day-to-day tasks. If you are one of the lucky few to reach this stage, consider launching a social selling certification program and using rewards and recognition to drive continuous improvement. Take what you have learned from your social selling practices to shape an employee advocacy program that can leverage the back-end content management processes you deployed to support your sales efforts.

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Supplemental Material

Companies Interviewed For This Report

Hootsuite

Reality Works Group

Oracle

rFactiva

Endnotes

¹ Source: Google search results for “social selling” as of July 2015.

² Forrester interviewed five financial services firms, social selling practitioners, and technology companies on how they implemented their social selling programs. We also gathered insights from marketing leaders and technology vendors on what it takes to launch a long-term program.

³ Marketers in regulated industries spend a long time trying to convince internal stakeholders to implement a formal social selling program. An interviewee told us, “At first, our executive team rejected the idea of a social selling program, so we went back to the drawing board and created a long-term strategy with formal compliance processes and identified the technologies that would help us manage them.”

⁴ Ten years into the social marketing boom, many executives are still going about social strategy backward: picking technology platforms such as Facebook or Twitter first, instead of focusing on what they want to accomplish. This report of the social marketing playbook explains our four-step POST method for marketing leaders working on social programs. See the “[The POST Process Drives Social Success](#)” Forrester report.

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- ⁵ Great marketing content fuels the demand generation engine, boosts brand visibility, and attracts buyers interested in solutions to the problems your company can solve. This report explains how to structure and drive real thought leadership that enhances your brand's reputation and draws in the right customers. See the "[Nurture Thought Leadership To Nurture Your Brand](#)" Forrester report.
- ⁶ Despite widespread investment in social media tactics, marketing leaders struggle to deliver solid business outcomes with their social efforts. In this report, Forrester introduces the four dimensions of social maturity and the key capabilities you will need for social success. See the "[Evaluate Your Social Marketing Capabilities](#)" Forrester report.

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