

JAMIE SHANKS

# SOCIAL SELLING MASTERY



SCALING UP YOUR SALES  
AND MARKETING MACHINE  
FOR THE DIGITAL BUYER

WILEY



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## Preface

My life changed forever on April 18, 2012, in Dallas, Texas. On that particular day, I was a first-time attendee to the AA-ISP (American Association of Inside Sales Professionals) annual Leadership Summit. I was the Toronto AA-ISP chapter president at the time, yet hadn't been able to attend the 2011 event because I had absolutely no money. That year was a disastrous one for my business, which you'll feel a true appreciation for by the end of this preface. At the 2012 AA-ISP Leadership Summit, I felt like a fish out of water. There, at this event, were all the big names of inside sales—Anneke Seley, Trish Bertuzzi, Ken Krogue, Jill Konrath, and hundreds more. Then there was me, from Canada, a 33-year-old absolute nobody in the industry. I remember feeling really awkward at the event because I was there to learn, but I also was very starstruck. My heroes have always been business leaders and now I was in a room with the top sales minds in the world. I kept saying to myself, "I'm meeting the people whose

books are on my book shelf at home.” I just wanted someone to pay attention to me.

To better understand my sense of desperation at the time, I’ll paint you a picture of my financial dire straits. I’ll take the story back three more years, to the summer of 2009. In that year, I was a self-proclaimed, hot-shit sales leader who made magic happen every time I picked up the phone. I was convinced that I was wasting my talents leading one sales team as an employee when I could be consulting to 10 at the same time as an entrepreneur. On January 4, 2010, I quit my job as the director of sales at Firmex (a SaaS software start-up in Toronto) and became a consultant. The first thing I learned about consulting is that there are zero barriers to entry, but 99 reasons why you’ll fall flat on your face! I convinced myself that local Toronto technology companies would flock to my greatness. I’ll spare you 18 months of terrible stories, but suffice it to say, I had a failing business that couldn’t seem to turn a profit. I kept asking myself, “Why is my business such a disaster?” The answers to my problematic start were only clear to me years later:

1. As a self-proclaimed sales expert, I didn’t eat my own dog food. I didn’t develop my sales pipeline every single day.
2. I had no idea how to properly manage cash flow for a business. I must have slept through cash-flow analysis in MBA school!
3. I didn’t create a personal brand. The telephone is great for quick hits, but by 2011 business leaders were already taking to the Internet to answer questions to their problems. I was nowhere to be found!

Nearly two years after starting my business, in March 2011, I was teetering on the edge of bankruptcy. Then, like a slap in the face from sales karma, three days before my wedding, the bomb dropped! I went to visit my top-billing client at the company’s office and the doors were locked. I came to find out that certain executives of this company had committed fraud by illegally sucking money out of the corporation. All non-equity-owning C-level executives, the employees, and unsecured contractors got screwed overnight! As an unsecured contractor, my

business was never going to get paid. I was owed \$35,000, but with the state of my financial affairs, it might as well have been \$100,000,000. I was dead! I had little backfill of clients to support this mounting debt and I was leaving for Costa Rica for my wedding, and then to Paris, France, for our honeymoon in just three . . . freaking . . . days! There was no way I was telling my soon-to-be wife what had just happened, as I assumed if I did, that this marriage thing would be over before it even began.

After returning home from an amazing, but very expensive, wedding and honeymoon, reality sunk in. I came back to a rainy Toronto in late March 2011 only to fully grasp the devastation to my business. I was faced with laying off all my employees, not paying myself for two months, and no real prospects to help my family survive. I was scared, so scared that I felt like vomiting nearly every day. I was in desperation mode, one of several moments that will define what kind of person you are. Many entrepreneurs around the world have had very similar moments like mine, and many times, their best eureka moments are sparked from desperation. My eureka moment ignited a second-half comeback that warrants me telling you this story to help set the stage for this book.

Throughout the summer of 2011, I worked to support my few remaining clients, but was preoccupied with thinking about new business development for myself. At night, every night, many times at 3 a.m., I would be in our spare bedroom, staring aimlessly at my laptop, hoping that some serendipitous event would come save my business. I can vividly remember these nights like a recurring bad dream. Oddly enough, I would have LinkedIn open on the home page. I honestly don't remember why LinkedIn specifically. I would spend hours and hours thinking about all my business development success via the telephone, and thought about how I could communicate with prospective buyers faster and with greater scale. This speed-to-market thinking is what probably had me staring at LinkedIn. I began to really see the potential of LinkedIn as it seemed like I was one-degree connection away from so many Toronto vice presidents of sales. Unfortunately, I couldn't find best practices online to help me monetize LinkedIn. I remember thinking about my experiences via the

telephone, and kept trying to mentally reverse-engineer my process inside LinkedIn. Slowly, throughout the summer of 2011, I started to figure out new ways to create sales opportunities for myself on LinkedIn. Each time I had successful breakthrough the night before, the next morning I would show my existing clients the tactics I had used. I found that clients were more excited to learn my LinkedIn sales tactics than to talk about my existing sales consulting services. Week by week, month by month, I got better and better at monetizing the powers of LinkedIn. Not only was I becoming effective with the tool, but my clients were showing repeatable success and quantifiable return-on-effort from my tips. By autumn of 2011, the entrepreneurial lightbulb turned on in my head—“If only I could find a way to turn my new LinkedIn sales tactics into a business.”

Fast forward to the afternoon of April 18, 2012, at the AA-ISP Leadership Summit in Dallas, Texas. At the conference, there was a breakout session by Josiane Fegion titled “Wake Up and Press Refresh on Social Media.” When I first arrived at the conference, I noticed this session on the agenda, and preplanned that this would be my moment to speak up in front of the entire room about my LinkedIn tactics. As I walked into the breakout room, I took a seat in the middle of the room on the right side. Little did I know, I was surrounded by sales and marketing superstars:

- Left of me: Gary Ambrose—CEO of TimeTrade
- Right of me: Ralf VonSosen—then CMO of InsideView, later to become CMO of LinkedIn Sales Solutions
- Behind me: Ken Krogue—Co-Founder of [InsideSales.com](http://InsideSales.com)

About 10 minutes into Josiane’s presentation, she asked the audience for specific examples of sales success leveraging social media. I sprung up like a leopard looking to attack a gazelle! I shouted “We have been helping clients send LinkedIn InMail to prospects with a 12-to 20-percent message-sent-to-new-lead-created ratio.” That one line changed my life forever. Honestly, I can pinpoint the moment exactly. The breakout room’s temperature seemed to change as the buzzing of chatter began to build. People looked at me as though I had invented

fire. Almost immediately, someone from the back had shouted, “Can you describe exactly what you’re doing on LinkedIn?” So, for the next few moments, I explained what I later would call the sphere of influence sales process. I felt like a rock star for the first time in my life. I had potentially created a consulting service that people actually wanted!

After the breakout session had finished, Gary Ambrose and Ken Krogue approached me to exchange business cards. They both asked me to call them to discuss doing a joint webinar and ebook on the topic of LinkedIn. I walked into the main lobby of the conference center with a sense of hope and newly found self-confidence I hadn’t felt in two years. The very next thing I did was call my business partner George Albert. This call should have been recorded, and I should plaster its text on the walls of our corporate office:

Jamie: “George, it’s Jamie.”

George: “How is the conference, any great leads?”

Jamie: “George . . . I’m telling you, we’re scrapping everything! I have been talking about our LinkedIn stuff, and people around here are calling it ‘Social Selling.’ George, we’re going to stop all of our other services and just coach people on Social Selling!”

George: “Are you f&%king mental?”

George may tell you this isn’t exactly what he said, but I beg to differ. He was right: How could we dismantle a business that was slowly starting to climb out of the abyss for this social selling thing? But for me, the point was simple, as *social selling* was a term that only a few people on earth could define. But, it seemed the appetite to solving this social media for sales thing was only going to grow exponentially.

Throughout the summer of 2012, I began to test my assumptions on the demand for social selling. George and I agreed that I would create a basic curriculum and train ten clients for free! Based on their feedback and quantitative success, we would both have a sense for the demand, and we would have ten client success stories to shop to future buyers. Providing our training for free was one of the smartest business ideas I’ve ever executed. Within 90 days, we had ten

extremely satisfied advocates and collected empirical sales success from these engagements.

I guess you can say, the rest is history. Over the next four years, we've created the world's largest social selling training system called Social Selling Mastery. As of the date of this publication, our system is being used by more than 60,000 sales and marketing professionals worldwide, and growing exponentially. We've helped companies acquire billions of dollars of incremental sales pipeline and revenue. It's been incredible to see our curriculum on every continent, in every size of company, within dozens of industries. Our idea of giving free training to our first customers in exchange for feedback inspired us to crowdsource all future curriculum development. Our current curriculum, the basis for this book, is the most robust and comprehensive in the world because it's consistently evolving from sales and marketing professionals' feedback.

I want to share my humble social selling beginnings with you because it proves that anyone can build a personal brand. Building a personal brand is going to be a major step you'll take to scale your company in this new digital economy. If you and your entire sales and marketing organization apply the principles based in this book, I promise you that social selling will positively affect the growth trajectory of your company. I can't wait to hear your stories of social selling success!

—Jamie Shanks



## Acknowledgments

This book would not exist without my beautiful wife, Rebecca Shanks. Her contributions go well beyond this publication, as I wouldn't have a business without her. Rebecca ensured my survival as an entrepreneur as both the household matriarch and financial stabilizer.

We're blessed with two incredible children, Hunter and Henley Shanks. I can't fully articulate how much of what I do is to better serve them. I once read that a parent's job is to become a series of positive memories for his or her children. This is what excites me about this book. My children (ages four and two at the time of publication) will know the successes that entrepreneurship has brought our family, but this book serves as a memory of how hard Rebecca and I worked to achieve that success.

The foundation to my work ethic is from my parents. While they're not entrepreneurs themselves, they work harder than anyone I know. They also supported me in every hare-brained business idea I've ever

had. The lesson I've learned is that you must allow your children to freely choose their own path, no matter how different from your own. My parents let me experiment, and they let me fall down. I believe entrepreneurs can be grown and cultivated from a very young age. I was one of those lucky people.

My closest friends, Mitch, Travis, and George, and my brother, Casey, and sister, Shannon, have been through the entrepreneurship battle with me for decades. They are incredible sounding boards, and I love them for it.

Finally, this book is fueled by Sales for Life and the amazing culture that George Albert and I have helped create. Our fast-growing team is committed to owning social and digital selling globally—and that all starts with fostering a culture that helps innovation thrive.

# Introduction: The Road Map to Digital Transformation

*Definition of synergy: The whole is greater than the sum of its parts.*

—Aristotle

I use Aristotle's definition of synergy to outline your road map to a digital transformation inside your organization. I can't stress this enough: Social selling success is a team sport, not a showcase for great individual contributions. Great teams that act as one cohesive unit always win more championships than the teams that gather amazing individual talent on paper. If there are only a few anecdotes that you remember from this book, please remember this definition of synergy and how teamwork is always going to outperform individuals working in a vacuum.

Every organization, no matter how effective at traditional selling principles, will start its digital transformation from simple beginnings. For hundreds of technology companies in San Francisco, this evolution has already happened, but for many global financial services companies, the seeds have just been planted. No matter where your company is in the process, all companies will face the digital transformation in six stages. The question you must ask yourself is: Where is my organization in this progression?

### **LEVEL 0: STATUS QUO**

Your organization is complacent and will continue selling as it always has. You have not established with your sales team the mindset that social and digital communication will have a positive impact on the business. There is little to no buy-in from commercial leaders on the effectiveness of social media, no social governance, and no formal training on social selling. The adage “sales is from Mars; marketing is from Venus” couldn’t be more true. These two departments couldn’t be more disconnected. Is this your organization, one in which sales and marketing barely speak? Are they even located in the same building, city, or country?

### **LEVEL 1: RANDOM ACTS OF SOCIAL**

“Random acts of social” is a popularized term by PeopleLinx. The social seed has been planted somewhere in your organization, but it hasn’t gone viral. Pockets of individuals, typically high-performing sales professionals, are attempting to create a groundswell of change. The problem with this is that there’s little to no empirical evidence to support the effectiveness of social media in sales. While a few commercial leaders may believe in social strategies, your corporate sales approach is pretty much status quo. Social selling is a whisper throughout the halls of your sales and marketing departments.

### **LEVEL 2: BUILDING A BUSINESS CASE: LINKEDIN OR SOCIAL MEDIA TRAINING**

At this stage, your organization has had enough internal demand for social best practices that someone is trying to formalize a game plan,

and build a business case. In spite of this, it's likely that you or your teammates have confused LinkedIn and social selling as one and the same. As a result, you've probably made any of these investments:

- *Multiple LinkedIn Sales Navigator licenses.* Your department's sales tool stack needed to standardize a LinkedIn product.
- *Training workshops.* Someone at your company was chosen to facilitate training. (Cue the social media marketer or a digitally native sales professional who seems to *get it*.)

Your sales enablement team is trying to gather ideas for a “Social Selling 101” workshop filled with a basic assortment of tips, tricks, and tactics. You and your sales team will learn the basics of becoming social, starting with redesigning your social profiles. Unfortunately, these training workshops are usually two missing ingredients: first, a road map to global change beyond these initial workshops to enable you to measure success; second, the involvement of marketing in this social selling equation, as the sales team is not being fueled with new insights to share with your customers.

### **LEVEL 3: SCALE: SOCIAL SELLING MASTERY**

Your Social Selling Mastery organization has top-down executive support to make social a priority. Your frontline sales leaders are driving accountability throughout their sales force to ensure social actions are reaching the defined measurable milestones. The digital marketing team is working side by side with sales to fuel the insights (i.e., content) that sales professionals will use to engage their buyer.

Social selling is manifesting beyond a business unit and seeking to be standardized throughout your entire sales and marketing organization. To become a Social Selling Mastery company, you understand that social selling effectiveness is not accomplished through a few training workshops. You and your sales enablement team will seek to weave social media into the DNA of your existing sales process. Social selling is additive, not a replacement for how your team sells today. You'll also ensure the skill gap between existing sales professionals and

future new hires is nonexistent by making social-selling training part of your new hire onboarding.

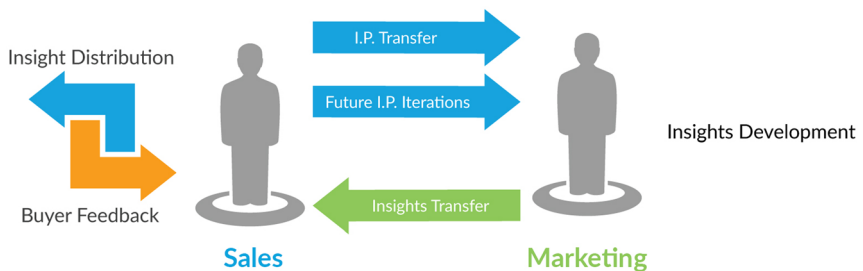
Throughout all business units, your sales and marketing teams are leveraging social “every deal, every day” (to borrow a phrase from Jill Rowley) as part of the following three intersecting pillars of social selling:

1. *Trigger-based selling*: Internal or external events happening around your buyer. This digital information can alert a sales professional in real time, allowing for highly contextual conversations.
2. *Insights-based selling*: According to Forrester and Corporate Visions, “74% of buyers choose the sales team that was first to provide value and insight within their buying journey.” Shaping your buyer’s journey early is critical, and leveraging digital insights will help arm your buyer with information to make informed decisions.
3. *Referral-based selling*: People buy from people. The road map of relationships can be mechanized through tools such as LinkedIn and Twitter. You can build a relationship road map to establish deeper connections with your buyer.



## LEVEL 4: SALES AND MARKETING ALIGNMENT

Social selling is simply a by-product of effective sales and marketing alignment at scale across your organization. We've met companies that have renamed their social selling initiatives "digital sales," as they recognize that digital communication goes far beyond social platforms such as LinkedIn. These companies have created streamlined communication bridges between sales and marketing, which has increased the flow of new ideas for digital insights. At a tactical level, your company would have an Insights Committee, which is a group of sales professionals that meets regularly with the marketing department to develop new digital insights that fuel sales conversations. This consistently developed intellectual property (IP) is repeated by creating a process that we call the *IP Transfer Loop*. The IP Transfer Loop has a sales professional story-tell an idea based on buyers' challenges, then the marketing team turns this idea into a new digital insight for sales professionals to leverage with their buyers. As the sales team deploys these digital insights into the market, buyers provide more feedback in the form of objections, concerns, and questions. This cycle continues to repeat itself, with more sales feedback, while developing more and more granular insights that are highly valuable for the buyer.



Sales and marketing alignment also begins to formulate new ways to measure success. Great social selling teams recognize that a buyer's journey involves both the marketing and sales efforts; thus, everyone in marketing and sales becomes accountable to winning that new buyer. You'll recognize greater sales and marketing alignment when your marketing team is no longer focusing on website traffic or lead volumes as their ultimate key metric. Alignment occurs when your