CPSA

Professional Development Unit Bundle

Competency: Sales Process Technology

PDU Value: 5 PDUs

Why do Professional Development Unit (PDU) Bundles exist?

Whether you're maintaining your CPSA Designation, or wishing to develop your skills in sales, our PDU Bundles are made to strengthen and reinforce the skills you need to help reach new heights in your career.

Maintaining your designation gives evidence of your commitment to the principle of lifelong learning and ensures that your professional sales skills are developed as markets, customers, and innovative technologies evolve.

As the holder of a professional sales designation, you are required to meet the annual Professional Development Units (PDU) requirement. This process ensures that you are up-to-date on the most current issues and practices in sales.

What You'll Learn from this PDU Bundle:

Section: Leveraging Sales Technology

Follow-Up Software

Author: Canadian Professional Sales Association

Did you know that as many as **50% of inbound leads are never contacted by a salesperson**? And even for those that do receive a follow up the outlook isn't great.**Research shows** that 80% of the time it takes five follow-ups to convert a lead, but 44% of reps give up after one follow-up attempt. Clearly then, if you want to make sure the hard-won leads supplied to your reps aren't wasted, you must have a well-defined lead follow up system in place.

Here are the components you need to include in a winning lead follow up system that will help your reps convert more leads to customers.

All Leads Must Be Entered into Your CRM

Your business can't afford to waste inbound leads! As a **sales leader**, you must insist on 100% follow up and lead qualification. To ensure this happens, the first component of your lead follow-up system is that ALL inbound sales leads must be entered into your CRM so that you can monitor their progress through the sales funnel. If reps aren't entering leads in a timely fashion, it's all too easy for them to fall off the radar. **Your CRM is an invaluable tool**. It not only allows reps to record contact info and important info such gleaned from interactions, but it also allows your reps to automate reminders so they don't miss out on opportunities. Most importantly, it allows you as a manager to track results and ensure follow-ups are happening in line with your lead follow up system.

Follow Up and Qualification Must Happen Fast

The faster your reps respond to leads the more likely they are to convert. In a winning lead follow up system, sales qualification happens within hours not days. While the method of initial follow up will depend on how leads enter the funnel - for example, welcome emails can be automated to online subscribers - actual sales qualification must also take place quickly. That means reps need to interact with leads either by phone or messages to ensure they have the means, motivation and permission to buy. Consider automating this process with an AI-powered lead qualification tool such as **Conversica** so your reps don't waste time on leads that won't convert. Once leads become qualified prospects, it's up to reps to **engage them** with all the tools and strategies at their disposal.

Include Tracking and Analysis for Each Stage

Perhaps the most important part of a winning lead follow up system is the ability to track, measure and improve the process. To stay effective, you need to know how many leads your sales team are receiving, how long it takes for them to initiate follow up, what percentage of leads become qualified prospects, and what percentage of prospects convert. Without these kinds of benchmarking and tracking capabilities, it will be very difficult for you to monitor the success of your reps against the metrics you set and keep them on track. Consider the CPSA's **Professional Sales Management** training program to learn more about using data, benchmarking and tracking to get the best out of your reps.

Sales Tips: Crafting a Lead Follow-Up System
Author: Canadian Professional Sales Association

Do you use a lead follow-up system? If not, it's likely that you're not being systematic in your follow up approach and this can result in many missed opportunities. The best salespeople are **organized and structured in their approach** and use a lead follow up system to ensure they stay in their prospect's mind without becoming a nuisance. Your **follow-up** system will depend on different variables such as how the lead was acquired and the personal communication preferences of your prospect. Therefore, it's important to craft a flexible system through which you track and move your lead through the sales cycle. Here's our tips.

Tip One: Act Fast With New Leads

If your leads are coming through online, then you have a very tight window of opportunity. In our technological age, customers and prospects expect instant responses. Automating emails to go out within five minutes is a great practice - strike while the iron is hot. Then make your first **follow-up call** within 24 hours so you can be ready to answer any questions. If you met your lead at an event, a call within 24 hours is again appropriate.

Tip Two: Have Lead Qualification Questions Ready for Your Call

Not only should you be ready to answer any questions your prospect has, you should also have your own set of questions on hand so you can qualify your lead in your first call. Make sure they have the means, motivation, and permission to buy. Listening skills are critical here, not only for qualification but for future follow up.

Tip Three: Plan for Multiple Attempts

Don't bank on getting through the first time and definitely don't give up. Craft your follow up system to encompass at least three follow-ups. **Research shows** that calling three times gives you an 81% chance of getting in touch with your prospect. Six attempts gives you a 93% chance. Make it part of your follow up system to schedule follow up attempts in your CRM so you don't forget.

Tip Four: Never End An Interaction Without Scheduling a Follow Up

It's unlikely you'll seal the deal on your first couple of interactions. As you talk, jot down or make a mental note of **reasons to follow-up**. There could be an obvious reason, such as your lead requesting further information but, if not, search for a valid reason - it's always there. Schedule a follow up before you let them go. Important note: make sure you find out their communication preferences. Simply ask them how they like to be contacted and then use that method.

Tip Five: Send a Thank You

A short **thank you** message after a call or meeting is great practice. Be sure to reference a point of mutual interest and reiterate the next scheduled interaction.

Tip Six: Map Out Next Steps in Your CRM

After calls or meetings with your prospect, make it a part of your system to evaluate where they are in the sales cycle and map out next steps. Be prepared to cut the cord on prospects that are drying up. Others might not be dead in the water but rather a longer term prospect. Add reminders in your CRM to follow up on key dates such a work anniversary, birthday or an industry event.

Section: Customer Relationship Management Software

Choosing the Right CRM For Your Sales Team

Author: Canadian Professional Sales Association

Ensuring you have the right **CRM for your sales team** is a big component of sales success. You need something that will have all the features to meet your business goals, while being at the right price point, with the right level of security and ease of use. With so many options on the market today, here's what to consider when choosing the right CRM for your sales team.

What Problems Do You Need Your CRM to Solve?

What's right for your sales team might not be for any other. Seeing as all CRM solutions are slightly different, you need to go into your search with an idea of what are the biggest issues your team faces and prioritize them. As a starting point, number these solutions in order of importance to figure out what's most important to your sales team:

- Ability to track customer base
- Ability to track leads
- Ability to track opportunities
- Ability to track closing rates
- The way it connects teams and team members
- Accessibility
- Reporting functionality
- Level of customization available

- Customer insights functionality
- Ease of use
- Price point and ROI
- Multiple business uses vs. sales only

Customization

Modern CRMs are cloud-based and give your team greater access than ever, so this shouldn't be an issue. They also offer a great deal of flexibility in terms of different features at different price-points, add-ons and customization. See what's available and how these offerings stack up against your priority list.

Remember to look ahead as you search for the right CRM for your sales team. How will each product perform down the line as your organization grows? Does it offer enough flexibility to meet your needs now AND five years down the line?

Compatibility with Existing Tools

Your sales team make use of a number of apps and tools to complete their day to day functions. So do an audit of all the tools they are currently using and for what purpose. Also take into account tools they would like to access in the future. As you choose your new CRM, find out which existing tools will be compatible and which won't. If there are important tools that don't integrate, weigh up alternate solutions when deciding if the switch would be worthwhile.

Implementation and User Adoption

Another thing to consider when **choosing the right CRM** for your team is how easy/cost effective it will be to implement and get your sales team using.
Find out how long it will take to install and whether there will be a period when your team can't access their data. Also, ask whether an outside consultant will be needed to complete the installation or whether it can be done in-house.

There can be tricky transition periods where data is lost or compromised. Be fully aware of the risks and find out what protocols the CRM provider has in place to ensure a smooth transition with no loss of data integrity. Training and ease of use are two other aspects about which you should inquire. In general, people aren't fond of change, so see what the CRM provider offers to ensure user adoption is painless. To get greater buy-in from your sales team, consult with them on the decision so they can share what's important to them in a new CRM and have some ownership over the decision.

Schedule a Regular CRM Review to Reap the Most Out of Your Sales Potential
Author: Michael Krypos

For any business that uses a CRM system to manage its client information, including sales, marketing, and billing data, the sales team has a multitude of reporting capabilities and access to client information at all times. This information can give a detailed view of any client's sales statistics, their current account status, and even a view of their billing cycles and marketing records. Because there is so much information saved in the CRM files, it is necessary to do a regular CRM review of all the accounts and data available to ensure that the records and information are kept up to date, as well as to assess the success and status of current sales tactics.

How to Review CRM Records

A Customer Relationship Management system, or CRM, has powerful and customizable reporting options. When performing a CRM review, it is important to set the reports to track and organize the data that your salespeople need to assess their successes and what their client accounts consist of. Select the options that are important to your team, including current client address, phone and contact information for each account. Including the contact information will allow your front office to verify any changes in client information customer records that may have occurred so it can be updated.

Once the criteria has been selected for your reports, run reports like marketing, sales, and accounting reports using the client accounts you want to assess. Each report will show a different perspective of the client account and allow you to get a cumulative view of the account status.

Assign each report to different sales team members to evaluate and report on. Each report should include an assessment baseline for the current account status.

If one account review seems to raise more questions that others, then run a report that will include all of the client's data in one comparative report. This function will allow you to prove or disprove any theories that had cropped up during the initial evaluation reporting. You and your sales team can now decide what steps need to be taken, if any, to address and potential concerns or issues.

If you and your staff perform a **CRM review** every three months, you will allow you team and your business the ability to utilize the powerful tools your CRM system supplies and keep a tight rein on your sales potential. Use this knowledge to better control your bottom line.

How Can I Source CRM Software
Author: Canadian Professional Sales Association

The CRM system that you end up choosing will really depend on your sales process, your internal structure, your current computer systems, and your business needs. We'd suggest reviewing a few different options first, and comparing reviews and features. Also, be sure to ask for client references from the companies that you will be working with to implement these solutions to get a personal account of what you can expect in terms of service and execution. This is a big decision to make for your company, and could be a long process, so take the time to do the research.

Here is a **quick, but effective comparison of features and customer reviews of various CRM options**. Keep in mind that this list is not exhaustive – it'll just give you a good start. If you have an IT department, I'd suggest involving them as well, as they may be able to provide the best insight into what will work for your specific situation.
Also, there are many online sources ranging from blogs to online magazines and forums. Listed below are some trusted sites resources to get you started:

CRM Knowledge Base —Highly valuable portal whose chief benefit is how it organizes CRM-related information into various components such as business intelligence, call centres, sales force automation and others. It also offers links to resources to books, industry articles, vendor white papers and software solutions.

CRM Directory —Features the latest developments and announcements in the CRM community. The site also features an online directory of software solutions for SFA, CRM suites, contact management software and hosted CRM solutions.

CRM Daily —Offers the latest in CRM news and visitors can sign up to receive **CRM Daily enewsletter**. News stories grouped by topics--CRM Systems, sales and marketing, business intelligence and more.

Mycustomer.com —Formerly known as the CRM Forum, this is an industry site for CRM professionals on both the demand and supply side of the industry. **The library area** of the site is quite useful with a selection of papers by leading CRM academics, case studies, conference presentations, and vendor papers.

Customer Think —Formerly known as CRM Guru, you can access online reports and archives plus participate in live webcasts. Contains detailed resources on CRM strategy, metrics, alignment, redesign and technology.

CRMProject.com —Site provides top-level analysis and best-of-breed solutions by making available white papers, articles and other reports from leading suppliers, academics, and CRM practitioners.

CRMExchange —Site facilitates an exchange of information on customer relationship management (CRM), sales, call center, and telemarketing issues.

DestinationCRM —Great site to start initial research if you have identified customer relationship management (CRM) as a key strategy for creating enhanced customer value. Content crosses many industries including technology, communications, finance, retail, advertising, and healthcare. Notably, the site features a Decision Analysis Toolkit, and a useful database of CRM-related service providers.

eCRMGuide —Customer relationship management and e-business news reviews.

Developing an Effective CRM Scorecard
Author: Sam Miller

One of the most widely recognized strategies that are being implemented in every company is the CRM system. Customer relationship management or CRM is a technique that helps businesses when it comes to dealing with their sales prospects and customers. This method can improve there relationship and interaction with the consumers and may involve technology which they can use to automate, organize and synchronize the processes in the business. These include the activities that are related to sales as well as marketing, technical support and customer service. The main goal here is to find new customers that they can retain. For their existing customers, their purpose is to nurture them and also entice their former customers so that they will win them back again. In the end, they will be able to reduce the costs of the customer service and marketing through this strategy.

Even though the CRM method is simple, there are still some problems that occur in the implementation of this strategy. The main difficulty here is that the entire management is having trouble when it comes to the communication of the goals that have been set by the company that are pointing to the customers. If this is one of the dilemmas that your company is facing, then you should make use of the CRM system scorecard.

The main purpose of CRM system scorecard is to be able to give essential reports about the effectiveness of the efforts and actions that are extended to the customer relationship management. This allows the documentation of the strengths and weaknesses of the company with regards to its efforts in handling a wide variety of actions that are focused on gaining new customers and sustaining the old ones. All the important aspects that are related to CRM have been given a value and they are prioritized according to their significance in the company.

One of the chef advantages of the CRM system scorecard is that it can help the businessmen and the employees in the company to become aware of their performance. They will be able to determine just how well they are exerting their efforts and eventually, they can improve in the areas that they think they are lacking in. In the end, they will be motivated to do their bests since they know that the entire management of the company is watching their move and scrutinizing those that are in the workforce.

Among the reasons as to why not a lot of business owners make use of the CRM system scorecard is because they think that this is a hard tool to use. Actually, it is not tricky at all. However, at the start of the implementation the management will have to put forth serious attempts so that they can come up with the correct aspects that should be included in the scorecard. Later, it can be used for performance measurement based on the relationship of the customers with the company. It is no surprise the CRM is widely implemented because of the great impact of the customers in the business.

Section: Presentation Software

How to Develop a First Rate Online Sales Presentation

Author: Canadian Professional Sales Association

Giving a **great sales presentation** takes a lot of practice and preparation. And as our world has become increasingly digital, online sales presentations are now the norm in many industries. While there are many positives - you can reach your customers/prospects wherever they are and at their convenience - the digital divide, the fact that you are not in the same room as your audience, can pose an array of challenges.

When you're not in physically near your audience, it can be much harder to gauge their interest and response to your pitch. It may be difficult to tell whether you have their full and undivided attention, or whether they are secretly multi-tasking and completing some other task whilst "listening" to you. Because of this, your online sales presentation needs to be entirely compelling. Read on to learn how to pull off a first rate online sales presentation and make an impressive sale.

Use the Right Software and Tools

Since online sales presentations are no longer 'the new kid on the block,' the days when you could get away with "glitches" and remarks about "technology, eh?" are gone. If it's difficult for your audience to connect, if there's issues with visuals or sound, or if connectivity is slow it's incredibly annoying and off-putting for your clients. Cloud-based platforms like **Pitch Deck** and **Slidebean** not only allow you create visually engaging presentations which are easily accessed from anywhere but come with a suite of analytics so you can discover how your audience engaged with your content. Whatever tools and software you use, ensure that you clearly communicate how your audience should connect to the meeting ahead of time and ensure that the connection process is as easy and smooth as possible.

Be Engaging

Just because you are removed your audience, don't think of your presentation style as any less important than if you were there. Whether or not they can see your face, you still need to be confident and exuding warmth and charm. Building rapport is vital if you want them to buy, so don't let your voice be monotone or your body language sloppy. If you will be visible, make sure that the view in the background is professional and not distracting and that you make frequent eye contact with the camera on your computer as if it were a person.

Make Use of Video

Video is having a moment. **Forrester research** shows that one minute of video is worth 1.8 million words and according to **Wordstream**, 59% of executives would choose to watch video rather than read something on the same topic. So make sure you include a short video in your presentation. Not only is this a great way to show off your product you can personalize them to your particular audience for a really impressive pitch.

Personalize Your Pitch

Perhaps the most important presentation advice, whether in person or online, is that you can't just use the same presentation for each client or prospect. And since engagement can be that much harder when you're in different locations, **personalization** is all the more important. Take into account not just the organisational needs or your audience, but the personal preferences of the individuals in your audience. Also, adapt your presentation depending on where they are in the buying process and what you've learned from previous interactions with them.

Top Tips to Build Your Most Impactful Sales
Author: Canadian Professional Sales Association

We all know that **sales presentations** are important. They're what many buyers use to decide between you and your competitors. To make an impact you not only have to explain why your product is the best solution to their business pain, you need to do it in an impressive way that surprises them and grabs their attention. Here's our top tips to build your most impactful sales presentation.

Tailor Your Presentation to Your Prospect

This is the number one rule and it's unfortunately all too often forgotten. No matter the time constraints or competing priorities, you should never use a generic presentation. Sure, you can start from a template, but each time you give that presentation, it should be tailored to the specific needs and preferences of the customer in front of you. Make sure for each point you make, you bring it back to their particular pain point and always reference the organisational specific stories, stats or issues they have mentioned to you. Think carefully about your customer's communication preferences and personality style. **Tailor your pitch to them**, if your customer is someone who is drawn in by anecdotes and storytelling, don't bore them with tons of statistics and reports. Conversely, if they are data driven, be sure you have the facts and data to back up whatever you are saying.

Avoid Boring PowerPoints with Too Much Text

This is presenting 101, but be sure you're never just simply reading off the slide on the screen. PowerPoint and other presentation software are great if you use them correctly but if you overload each slide with info, it's likely the presentation will be a boring turn off. Remember that each slide should contain a succinct idea - perhaps a fact, image, diagram, chart or fun animation accompanied by your logo - but it's up to you, the presenter to bring this to life. Be enthusiastic and passionate about everything you are saying and modulate your voice to infuse it with energy. Smile and be engaging but don't go overboard with hand gestures. Take your time and speak with calm, easy confidence.

Stay Succinct

"I really loved that presentation with 100 slides and long transitions," said no one ever. If you want to engage the client or prospect, stick to key points and keep focused on **how your product will benefit them** rather than listing endless features. Be prepared to judge the room: Don't be afraid to jump one section and go into more detail in another if that seems appealing to your audience. Ideally, you want to spend less time talking at them and more time interacting, so leave lots of time to answer questions and be prepared to give great answers.

Get Creative To Bring Your Product or Service to Life

The point of your presentation is to make your customer believe that your product is the best solution in front of them. You need to be able to bring it to life. If there's a way that you can use the product in the presentation or have them experience it in the room - do that. If not, use technology to show them the presentation in action; for example, incorporate a short explainer video into the presentation. But always remember, personalisation is key. One client might respond really well to flashy showmanship. Another might be put off if you start pulling out bells and whistles. So always do your research and know your audience.

At the end of the day, the most important tip to building an impactful sales presentation is to truly believe in your product and the solution it provides. If you believe in your product and convey this belief and passion effectively, that's the best tool you need to creating a lasting impression and closing the deal.

The Elements of a Winning Sales Presentation
Author: Canadian Professional Sales Association

So your clever sales and marketing funnel process had led to a meeting in the book with a client who'll be expecting to see a **stellar presentation**. So what now? How can you ensure that you present a compelling argument; one in which you address the goals of the lead's company and demonstrate how your product or service is the perfect fit?

Here are some of the key elements that go into a winning sales presentation.

Show a Need for Your Services

Establishing the client's need for what you're selling means being clear about why everyone is in the room and needs to listen to what you have to say. This is your opportunity to engage your audience and put everyone on the same playing field. How you describe and position the need will change based on the conversation and the content of the sales presentation. Establishing the need will mean that those listening to your presentation will understand how your services and products are relevant to them.

Satisfy the Need

Once you have proven the need, it's time to demonstrate how you can satisfy it. This is the part of the sales presentation where you can unveil your services/product that will solve the problem and satisfy the client's need.

As part of this stage, it is also important to provide supporting data or facts that prove out just how your solution will change things at the client organization for the better.

Paint a Picture

Once you've introduced the solution, it is time to help your audience see how much better their life would be if they took the action you're about to request. Be sure to **clearly present the beneficial results** and ROI that the client can expect from the solution you're providing.

The CTA

The last step is the most vital; asking for an action. Just because those in the meeting room get what you bring to the table and how it can help, it doesn't mean that they will automatically seize the initiative and pursue next steps in the buying process. It is your role at the end of the presentation to ask for feedback and commitment to move forward.

Be sure to make the ask. Your call to action (CTA) should clearly define decisions and actions which need to happen next in order to move forward.
Providing a compelling and **engaging sales presentation** which leads to new business requires that the salesperson presents the right information at the right times within the session. By following the above steps, you'll be equipped to better communicate and persuade.

ZHow to Fix an Awful Presentation and Turn it Around!
Author: Canadian Professional Sales Association

It's every sales pro's worst nightmare. You've worked so hard to get this group of decision makers in a room with you and now...well, it's all gone wrong! Maybe you were too nervous or flustered, maybe your technology let you down, or maybe you just pitched the whole thing wrong - whatever the reason, you're in trouble!

When sales presentations go wrong, the most common response is to just get to the end slide as quickly as possible and take your leave. But doing so is not going to help your sales figures. Read on to learn how to fix an awful sales presentation and actually turn it around.

Have a Back-Up Plan

Rule one comes down to preparation: never be too reliant on technology. Even the most expensive tech or software can sometimes let you down. So always come prepared with a back-up plan so that if it's just going to be you and no slides/videos/images/demos, you've still got **something meaningful and persuasive to say**.

Take a Pause and Breathe

Please understand that "bravely" soldiering on 'til the end of your slide deck will win you no friends. Taking a pause is not giving up, in fact, it's the best thing you can do when your sales pitch takes a nosedive. Take a sip of water, breathe and consider for a moment where it's all gone wrong. If it's the technology or the nerves that's thrown you off your game, give yourself a strong talking to and get a hold of yourself. If it's something more major, like you misjudged what the company wanted or you're boring them to death, you've got to get creative and think on your feet. Remember, it's ok not to go through every slide in your deck. Slow down and stick to what's important: **how your product will add value to their business**.

Address The Audience Directly

No, not to apologise or make an excuse. No-one wants to hear you say "I'm sorry, but my laptop just gave out," or "I apologise that this is a little long but there's so much to cover." You might think that apologising will warm the audience to you but, in fact, what it actually does is create an even more negative, awkward atmosphere. It also positions you as a victim rather than the confident and assured professional from whom they'd be willing to buy. What you should do instead is address the audience to ask them a question. If they're falling asleep in their chairs, you need to grab their attention and get them involved. Say something like, "I'd just like to take a moment to hear your thoughts: what's one question you came here with that you'd really like to hear the answer to today?" By doing this, not only do you deflect from the disaster that might be occurring up on the podium, you're giving yourself a chance to restart and refocus on what's important.

Go Off Script with an Anecdote

Another way to turn around an awful presentation is to look up from your notes and tell an off-script anecdote. Not only do anecdotes help you build rapport with the audience, they are so much more engaging than reading off a slideshow. Try a real-life example of how your product has helped another business in a similar situation or use an analogy to relate the situation they are into something you've personally experienced. Take your time and try to relax. Doing so will create a more personal connection between you and your audience and get them on your side.

Refocus on Them and Not on Your Product

The most important thing to remember when giving a sales presentation is it should be all about them: their business, their business pain, the solution they need. The reason that you are there at all is that you have something that could potentially change their world for the better. If you're overly nervous, think of your presentation in terms of providing them with a solution: you're there to help them and improve their business. If what you're saying is not resonating, always refocus back on them. People love to talk about themselves, so ask a question like "What's the biggest challenge you face in the day to day running of your business?" or "What's one thing that would make your life easier?" If you spend the remainder of your presentation in conversation with them about their business and the solutions that your product can provide, that's a ginormous win!

It's disheartening and disappointing when sales presentations don't go to plan but you always have the chance to leave a positive impression through your resourcefulness.

Implementing Social Selling
WEBINAR: Attract New Leads with Social Selling
Author: Canadian Professional Sales Association

Did you know that 51% of social sellers are more likely to reach quota? Sales pros who are not active in social media are missing an important **opportunity to connect**.

Hear from our panel of top social selling leaders on how you can implement social selling techniques to build relationships and increase sales opportunities.

Watch now.

WEBINAR: How to Use Social Selling to Influence your Pipeline
Author: Canadian Professional Sales Association

This session will consider:

- *Key tactics and tools to help you better engage with prospects in your sales funnel*
- *Attract interest from new audiences*
- *Get a better handle on the metrics which can improve your social media ROI.*

[Watch Now.]

Social Selling for Beginners: Where to Start
Author: Canadian Professional Sales Association

Everyone in sales is talking about using social media to close deals. Social selling is an established approach to selling that allows salespeople to target, **engage** and build relationships with prospects and customers.

For those who still don't use social platforms or who are new to sales, social selling may seem to lack authenticity. When done right, however, it is a powerful way to reach new audiences in the right ways. If you're wondering how to begin social selling, read our tips for social selling beginners.

Set Up Social Media Profiles

The first step to social selling is setting up your profiles and accounts on different social media platforms. This isn't as simple as entering in your login information – you need to build a personality and some depth on your profiles. For instance, you will want to fill out your work history and interests on Linkedin so that your prospects understand who you are and your areas of expertise. It's also important to have a professional looking photo for your profile picture. On other social media platforms, you will want to fill out your bio and include a few photos so that your profile doesn't look like spam.

Understand Different Platforms and How to Use Them

There are several different social media platforms, and for those that are new to social media, or simply just looking for different, creative ways to use them, there are few things to keep in mind about each one.

1. Linkedin

Linkedin is generally regarded as the professional social media platform, and so it is important that your posts, comments, and messages all reflect the type of image you want to have in the workplace. It is also a good idea to stick to topics related to career development, best practices in your industry or field, or other work-related information. Linkedin is one of the best platforms for **prospecting**, so it is a great way to build your funnel.

2. Facebook

Facebook is most often used for personal reasons, and so it is not a good idea for sales professionals to be overtly salesy on the platform. For instance, you are unlikely to have a lot of success sending your prospects cold outreach messages through Facebook. However, sharing interesting content, creating a discussion group for your industry, or running contests and events is a totally acceptable way to use Facebook in sales.

3. Twitter

Twitter is used for both professional and personal social networking, and can be a great way to engage with your prospects. Start by following them on Twitter and sharing or retweeting their content. You can also mention them in your own tweets if you have something relevant to share with them. Keep in mind that Twitter is a noisy channel, so you will need to tweet regularly if you want to build a following.

Begin Building your Credibility

In traditional selling, you have credibility with your prospects simply because you work for a certain organization or have a certain job title. In social selling, you need to focus on sharing your knowledge in order to **build that credibility**. Write posts that are intended to pass on a useful nugget of information. Engage with your followers even when these people are not prospects or customers. The more **authentic** and informational you can be, the more credible you look, which will help you when you do reach out to your prospects for sales.

It takes time and patience to see success with social selling, but once you have built credibility with your prospects, selling becomes much easier. In fact, you may build your brand to the point that leads actually come to you.

How to Maximize Your Prospecting on Social Media
Author: Canadian Professional Sales Association

If you've been wary of using social media for sales, or using it without too much success, this article will explain how you can maximize your prospecting with social media through Facebook, Twitter and LinkedIn.

Prospecting with Social Media: Facebook

If you want to maximise your prospecting with social media, start by looking at the world's most popular social network. **Facebook** is a treasure trove of information on your prospects. It's on Facebook that people share insights into their life outside of work - knowledge that can help you find points of mutual interest and connections. You'll also be able to see if you have mutual "friends" - common connections who might be able to make an introduction for you.

Facebook groups are very important for prospecting with social media. Join groups that are related to your product/service or industry. Once you're part of a group, use the opportunity to demonstrate your industry/product knowledge by sharing information, news and offering advice. If someone in a group has a question, try to answer it and provide solutions without linking to your website as links can feel spammy.
You want to avoid being overtly salesy but talk about your product when it's appropriate and ask people to send you a private message if they want more information. That way, they are instigating the conversation. The point of this strategy is to build trust and by using Facebook groups you can become part of a community built on trust. You can also create your own groups related to your product and invite prospects to join. From there you can send targeted messages to those who are active within the group.

Prospecting with Social Media: Twitter

A similar strategy, where you use social media to position yourself as a trusted expert, can be conducted over **Twitter**. Twitter is great for prospecting since people who are active on usually share things publicly and it's easy to find prospects and relevant topics (hashtags) using the search function.

Search for your prospects and use **social listening** to understand their views and business pain. Find out what they are tweeting about and join the conversation by using the same hashtags that they use. Tweet out helpful content yourself with relevant hashtags; become a go to resources for industry news and information.

Twitter works differently than Facebook where it isn't appropriate to send a friend request to someone you don't know. On Twitter, it's perfectly acceptable to follow your prospects if they are tweeting about their business from their personal account and you can follow their company account at any time. Engage with their tweets; liking them or retweeting when appropriate.

Prospecting with Social Media: LinkedIn

LinkedIn is by far the most popular social media platform for prospecting. Much has been written about creating a great **LinkedIn strategy** and you can certainly maximize the return on your time spent prospecting using the platform. Your prospects' LinkedIn profiles include so much valuable information such as common connections, their work history, their education, the groups they are part of and other valuable information such as charitable causes they are passionate about. All this information needs to go into your CRM so that when you finally converse with them you can use them as points of discussion to build rapport.

With all social media platforms, you need to stay active to gain followers and become known as a trusted industry expert. As with both Facebook and Twitter, you need to make sure you are posting relevant content that speaks to your prospects' concerns and interests and adds value. Aim to share industry-related content two to three times per week. Also make a point to comment on your prospects' posts and engage several times per week.

Like Facebook groups, LinkedIn Groups are great for prospecting since not only can you share valuable information and build trust but they also allow you to connect with third-degree connections if they are members of the same group. Join those relevant to your industry, product or service.

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