

JOIN THE SOCIAL SALES REVOLUTION

YOUR GUIDE TO THE NEW WAY TO SELL



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CHANGE YOUR MINDSET



THE NEW ABC: ALWAYS BE CONNECTED

By Scott Tapp, EVP of Sales & Marketing, PGI

“Always Be Closing” is one of the oldest sales clichés in the book, popularized in film and pop culture. That sentiment has fed the image of the sleazy, high-pressure salesperson who cares so much about their commission that they’ll stop at nothing to pull a fast one on the unsuspecting customer.

Sales has evolved, and the mantra of “ABC” has fallen out of favor. It’s a new day for sales professionals, driven by an unprecedented level of connectivity and access to customers and prospects. Social media, wireless data, texting, mobile email, instant messaging and unified communications have created the potential for a faster, smarter sales force. Parallel with these technologies, new sales-centric tools have emerged: social listening, CRM, team workspaces, web chat, video conferencing, smart calendars and file sync and share services, just to name a few.

All of these tools can be downright game-changing in the right hands, but they can also easily be overwhelming if your sales team, leadership and culture aren’t aligned and educated.

This new era of sales is more about creating honest, authentic relationships through better access to information, which is the product of technological advances unlike any in human history. Your customers are already online. They’re researching you just as much—if not more—than you’re researching them. They’re showing up at your door better educated and informed than ever before—and you need to be ready to meet, greet and connect at a new level.

THIS NEW ERA OF SALES CALLS FOR A REVOLUTION.

It’s time to leave “Always Be Closing” in the dust for a new version of ABC: one that celebrates the awesome interconnectedness fueling modern sales.

THE ABC REVOLUTION STARTS NOW: GET CONNECTED

In this eBook, we’ll investigate how to make the most of these new opportunities:

- ✓ **PRESENT A UNIFIED FRONT**
Learn how social sales continues to be more than just a buzzword, generating must-use tools for nurturing your personal and professional brand and identifying the right prospects.
- ✓ **BREAK OUT OF YOUR LOVE-HATE FOR CRM**
When it comes to an organization’s relationship to CRM, it’s complicated. We’ll review the common love-hate issues and show you how to get the most out of this valuable but often misunderstood tool.
- ✓ **RISE ABOVE THE NOISE**
Learn how to make your content stand above the crowd, breaking through the noise and positioning yourself as a thought leader and trusted advisor.
- ✓ **REVOLT AGAINST SILOS**
Learn how sales has become collaborative, leaving the lone-wolf hunter mentality behind for a culture of teamwork.
- ✓ **RALLY THE TROOPS**
Learn about trust in this new era of sales and how to be just as authentic behind a screen as you were giving firm handshakes face to face.



STEP 1: PRESENT A UNIFIED FRONT



THE COLD CALL IS DEAD; NAVIGATING THE SOCIAL MEDIA LANDSCAPE IS MISSION CRITICAL

By Alex Hisaka, Global Content Marketing Manager, LinkedIn

Social posts need constant promotion and compelling CTAs to be successful.¹

SIMPLY POSTING ISN'T ENOUGH

THE AVERAGE SHELF LIFE OF A SOCIAL POST IS **4.2 HOURS**



The “why” of social sales is well established: the cold call is dead, buyers are savvier than ever before and inbound sales drive more revenue at a lower cost per lead. But what about the “how?” How can today’s sales professional make sure they’re properly presenting themselves on social media?

Here’s how to begin building a social selling strategy that aligns with your organizational objectives:

ENCOURAGE YOUR TEAM TO IMPROVE THEIR PROFESSIONAL BRAND

Research shows that 81% of buyers are more likely to engage with a strong, professional brand.² Your company has its own online branding efforts, and individual reps have their own professional brand as well. The strength of these personal brands lends credibility to the company, and vice versa.

Professional profiles on platforms such as LinkedIn often shape prospective buyers’ first impression of your company. Ensure that your team is presenting the right image with completed profiles that feature compelling, customer-centric messaging. Once the social selling foundation is laid, your team can focus on the activities that generate results.

FIND THE RIGHT PEOPLE

LinkedIn’s Advanced Search is a powerful tool for identifying high-probability sales prospects. Reps can filter searches using more than a dozen parameters to find decision makers in their own network and their extended networks. (LinkedIn’s premium product, Sales Navigator, adds even more filters and levels of connection.)

Finding the right people doesn’t require a lot of time. Examining a prospect’s profile will show the mutual connection between the rep and the buyer, as well as commonalities the rep and buyer share. All of this information makes it easier to qualify potential connections as either a prospect or as someone who can connect you with a potential buyer.

SHORTEN THE SALES CYCLE WITH RELEVANT ENGAGEMENT

Selling has increasingly become about establishing relevance and delivering value. You want to reach out to the right person at the right time with the right valuable insights. A prospect’s posts, status updates, news updates and shares can provide context to where they are in the buying cycle. Using this information, sales pros can send personalized

messages using tools such as InMail to connect in a way that is timely, relevant and useful.

PROVIDE VALUE TO STRENGTHEN RELATIONSHIPS

Social selling makes it easier for sales pros to provide the kind of ongoing value that builds strong relationships. The wealth of up-to-the-minute data that social networks such as LinkedIn provide makes it easier for your team to establish credibility by providing value before, during and after the decision making process.

You know the “why” of social selling. The specific steps we’ve outlined above show how to align your team to the Four Pillars of Social Selling:

- 1 Create a professional brand
- 2 Find the right people
- 3 Engage with insights
- 4 Build strong relationships

With the “why” and the “how” questions answered, there’s only one question remaining: When?

STEP 2: BREAK OUT OF YOUR LOVE-HATE FOR CRM

IT'S TIME TO FOCUS ON THE "RELATIONSHIP" ASPECT OF OUR CRM TOOLS

By Meg Bear, Vice President Social Group, Oracle Cloud



When it comes to CRM, organizations are often of two minds: leadership loves it for forecasting earnings, managing expectations and keeping track of the sales force, while sales teams view it as an unnecessary time sink that interrupts deal flow.

While technology has always been about pushing the edges of what's possible, that can create friction and silos inside organizations.

THE HATE FOR CRM

Nearly 9 out of 10 enterprises implement some sort of CRM system, and yet more than a third face low adoption rates. The tools are there, but something about the experience, value or perception is causing sales to leave them behind.

So what's the problem? For starters, CRM is commonly confused with tedious record-keeping systems of the past, and sales people have high-touch roles and little tolerance for processes that inhibit or slow down their deal flow. And between the consumerization of IT and the rapid pace of digital business transformation, everyone expects high-value information to be available instantly at their fingertips.

However, CRM's poor reputation is undeserved. The "relationship" aspect of the CRM—the part that gives us unique insights into a consumer's likes, wants, desires,

attitudes and thoughts—was never actually fully realized in the prior generation of systems. There often wasn't enough available data to drive a complete understanding of the customer and this left the relationship a bit one-sided. The systems of record gave you a company-centric view of the customer, not a customer-centric one.

In other words, there's been a large void in CRM—a missing piece of the puzzle, if you will—in the 360-degree view of the customer, and that void is being filled by systems of engagement such as social media. Unlike any other channel before, social ultimately delivers on the promise of CRM as truly relationship-building technology rather than just a system of record.

THE LOVE IS IN THE RELATIONSHIP

The social aspect of CRM provides companies with the world's greatest focus group, as well as offering the ability to build out more personalized profiles, better products and services, more relevant content and deliver more fulfilling customer experiences. With CRM, empowered and social sales teams help drive the human side of a company's brand voice to deliver stronger, more engaging customer experiences, and engaged social employees are some of the strongest branding for organizations.

True relationship-based CRM creates a mutually beneficial way of doing business where customers' needs and complexities are better understood and applied in order to make customer profiles much more insightful, accurate, personalized and actionable. It's about providing personalized, scalable relationships through the power of collaborative social, mobile and cloud technologies.

Turning CRM hate into love is all about empowering the sales person while driving business value for the company. The priority now is the usability and the productivity built in for sales teams—a mobile-first design approach that collects all the information that sales needs to better engage with their customers, driving mutual value for their customers and, ultimately, help them make more intelligent decisions about how best to spend their time.

CHANGING MINDSETS

To some degree, change starts from the top: the C-suite has to embrace change management and turn to new and advanced workflow, tools and business models for our modern, hyper-connected business climate. From customer experience tools like CRM, sales, marketing and social, to platform capabilities like enterprise networking tools and business intelligence, the technologies exist to help transform traditional

sales practices and processes into modern, innovative selling.

Today, companies like Oracle are building out tools for the mobile and digital sales teams that help them close deals faster while delivering organizational insights to better drive business planning and execution. With better UX and modern cloud-based solutions, we are able to invest more in the relationships and results, using social insights and engagements to enable a better and more personal sales system. This allows sales to cultivate relationships that are mutually beneficial and drive more value for both the company and the customer.

It's about leveraging the power of the customer's voice—not by becoming rigid in your solution but by building a listen-and-learn culture inside the company—to make the pace and power of the digital age a sustainable competitive advantage.

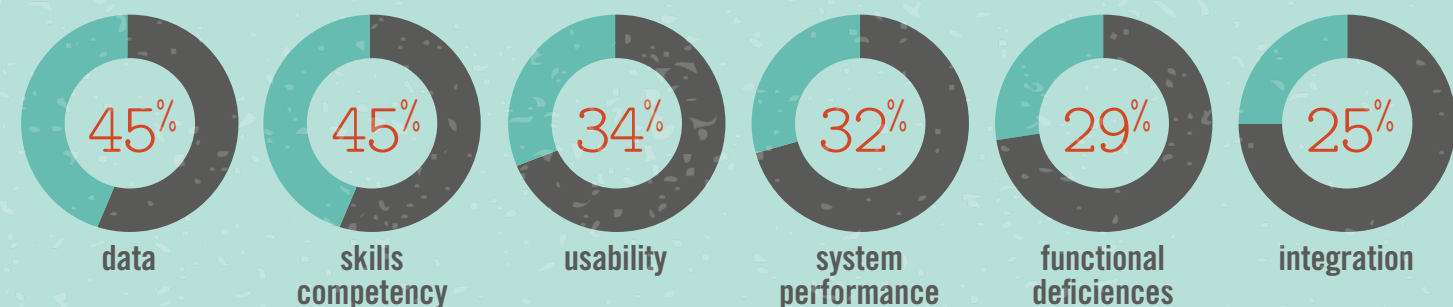
It's a shift in mindset for many, but these are shifts that can ultimately yield deeper, more relevant insights to drive innovation, personalization, better products and services and, of course, better experiences for both the customer and company.

90% OF ENTERPRISES IMPLEMENT CRM, BUT NEARLY 30% FAIL³



Low adoption rates spell disaster for a third of all CRM implementations

TOP TECHNOLOGY CHALLENGES TO IMPLEMENTING CRM⁴



STEP 3: RISE ABOVE THE NOISE

PUT THE *THOUGHT* BACK IN THOUGHT LEADERSHIP

By Caitlin Roberson, VP West, Skyword



Everyone wants to talk about content: how to produce it, how to leverage it and, most importantly, how many leads it drives. With so many voices in the crowd, however, it's important to take an intelligent look at content initiatives in order to rise above the noise and differentiate yourself.

As a sales professional, you have the unique opportunity to leverage content not simply to sell, but also to engage in more profound, insightful conversations through social selling “thought leadership.”

DEFINING THOUGHT LEADERSHIP

How do you even define “thought leadership”? I'll be honest: I hate most definitions of the term. They tend to be ego-driven, buzzword-fueled diatribes masquerading under the guise of mock-humility. Instead, I've found that my friends who are out there leading every day start to bring the picture to life. Through them, I've learned that leadership involves:

- + Staying curious and continually learning
- + Augmenting the best in others
- + Listening first, and then responding
- + Endless glass-half-fullness

For me, these elements are the core of thought leadership: sparking conversations about what matters most to your audience. Thought leadership can (and SHOULD) be way more

opinionated and personal than other types of content, whether from a brand or an individual.

I can tell you from experience that this kind of content can be risky to put out, especially when it's emotionally charged and/or opinionated. The good news is that when people react emotionally to something, they're more likely to remember it (and more likely to remember you).

HOW CAN SALES PROFESSIONALS BECOME THOUGHT LEADERS?

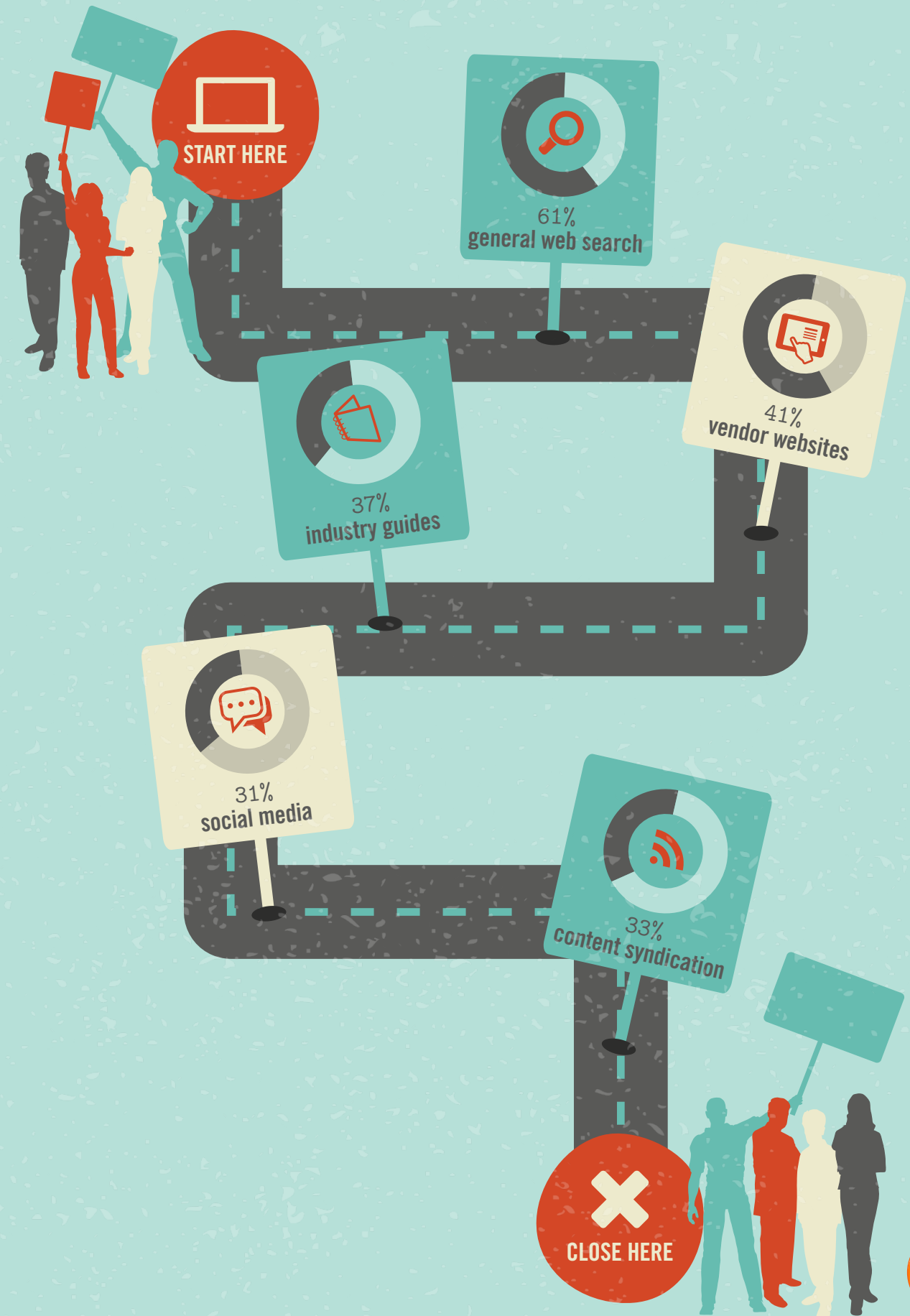
The very phrase “sales professional” makes this a charged question. Who wants to hang out with a car salesman? No one. All sales pros carry revenue accountability; it's why we have jobs. It also means that we've all got an agenda.

The key is to not think about product positioning. Instead, ask yourself a few questions:

- + **Do I know what matters to my audience?**
Take the time to understand your readers' life experiences—challenges at work, aspirations, hobbies, etc.
- + **What topics would I respond to, if I were them?** If you wouldn't talk about something with somebody else—face-to-face over coffee or Cabernet—don't bother doing it online.
- + **Have I served up those conversation starters in as many formats as possible?**
After all, we all learn best in different ways.

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BUYER'S JOURNEY THROUGH CONTENT⁵

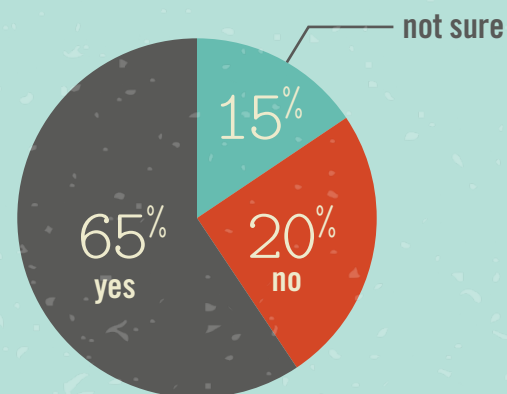


“Broadly speaking, the short words are the best.”
Winston Churchill

RISE ABOVE THE NOISE

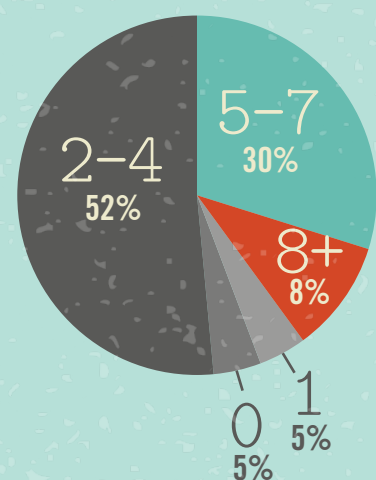


CONTENT HAS A SIGNIFICANT IMPACT ON BUYING DECISION⁷

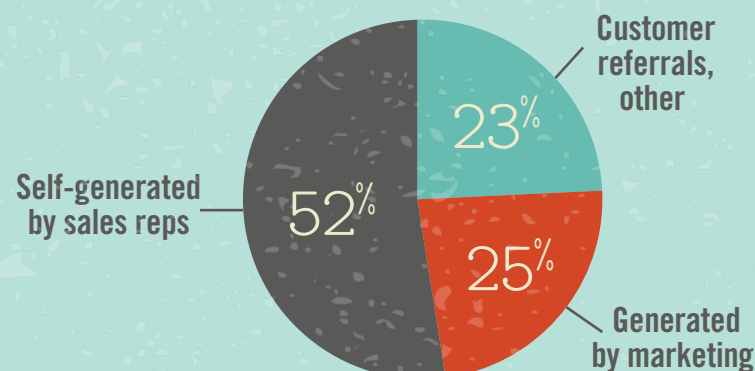


HOW MUCH IS TOO MUCH?⁶

OF CONTENT PIECES OFFERED FROM WINNING VENDORS



GENESIS OF SALES LEADS SHOWS THAT LESS THAN A QUARTER COME FROM CUSTOMER REFERRALS⁷



HOW TO STAND OUT FROM THE SOCIAL SELLING CROWD: DON'T SELL

Here are four things sales pros should never, ever do when creating and sharing social content:

NEVER talk in features. Features are for websites and product sheets, not blog posts.

NEVER use jargon. You may be attempting to appear knowledgeable, but all you're doing is confusing the issue. Keep your language simple and clear.

NEVER write long paragraphs. Just like you, your prospects are busy and you should be mindful of their time. The best thought leadership will only get shorter and more visual.

NEVER sell. Your product or service only gets involved when the buyer wants it to. Let them self-select.

AMPLIFY YOUR THOUGHT LEADERSHIP THROUGH SOCIAL SELLING

If your content isn't share-worthy (or optimized for search), it might as well not have been written. That's where social media can be an incredible thought leadership catalyst: Distributing and amplifying ideas, to spark change and power

transformation—and help you build social selling connections that convert to revenue-generating customer relationships.

It's important to remember that you don't have to reinvent the wheel. Start small when you're creating content by repurposing or adding your insights to other ideas. Read articles that interest you and add your two cents on social media. Package smaller ideas into larger bits of content. If your company is already creating content, you can repurpose it by adding a few personalized sentences and a link. Send these in emails to your prospects and customers, and you'll see them work like gold.

When I write blogs or LinkedIn content, I often include the insights of others. When that content is published, it lends itself to a really simple social strategy: Thanking others for their input—most often with @mentions on Twitter or LinkedIn. Everybody loves to be recognized and credited for their ideas, and it's easy to RT and comment on posts that have already been made. Finally, I'll leave you with three simple rules that truly bring authenticity to your content and help you stand out from an increasingly large crowd: Be you, tell stories, and go with your gut!

If your content isn't share-worthy (or optimized for search), it might as well not have been written.

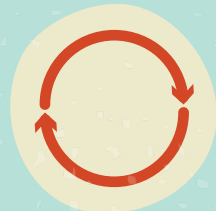
HOW VIDEO FOSTERS TRUST IN THE SALES CYCLE¹⁰

VIDEO MAKES CONTENT MORE ENGAGING:



63% far more important
32% somewhat more important
5% not changing

VIDEO DRIVES HIGHER CONVERSION:



19% much better
52% somewhat better
27% about the same
2% somewhat worse

VIDEO DELIVERS BETTER ROI:



48% better
25% same
1% declining
26% unknown

STEP 5: RALLY THE TROOPS



TRANSFORM YOUR ORGANIZATION BY CULTIVATING A CULTURE OF TRANSPARENCY AND OPENNESS.

By Amar Sheth & Jamie Shanks, Sales for Life

In business, the one value that trumps them all is trust. Regardless of how business was done in the past, how it's approached today and how it will be done in the future, trust will always reign supreme.

Trust is the outcome of a specific set of actions and non-actions. Trust is not something we do in sales, it's a place we get to that helps the buyer feel comfortable enough to do business with you. In short, trust is something that's earned.

In today's business world, digital and social communication is becoming much more pervasive. Buyers are increasingly using online tools and resources to research and find answers to their most pressing questions.

EARNING TRUST ONLINE

As buyers become more social, sellers inevitably will as well. Can trust be earned by sellers this way?

The short answer is yes, but it requires focusing on genuinely conveying your experience and expertise.

The reason buyers are on social media doing research is because they'd much rather learn and form their own opinions than listen to sales pitches. This presents tremendous challenges and risks to the traditional sales model where information is mostly controlled by the sales person without any third-party and multi-sourced research.

FOCUS ON EDUCATION, NOT SALES PITCHES

The most successful social sales professionals are those who focus on helping a buyer research and discover information. By observing, listening and curating unbiased information that helps the buyer, the social seller helps create an environment free of barriers to open dialogue.

This intense focus on helping educate the buyer, free of pressure and expected sales pitches, is when trust is earned.

THE MECHANICS OF EDUCATION

The smartest and most practical way to educate social buyers today is through content. Helping them discover new ideas, getting them to think about concepts they're not aware of, helping mitigate risks, etc. are all ways to educate through content.

The beauty of online content is its abundance. The challenges and risks of online content for buyers is also, without question, its abundance! Like you, our buyers are looking for information that is educational and can help answer questions as quickly as possible.

Make no mistake, the onus to educate buyers is now on the sellers.

There are tools that sellers can use that make the job of conveying experience and expertise much easier. And by far one of the best mediums today is video. If And,



STEP 4: REVOLT AGAINST SILOS

BUILD A COLLABORATIVE SALES CULTURE THAT INCLUDES THE RIGHT TOOLS, ENVIRONMENTS AND PROCESSES

By Isaac Garcia, SVP & General Manager, iMeet Central



Today's sales force is more mobile, remote and flexible than ever before. For example, 80% of respondents to a recent survey conducted by PGI answered that they have the opportunity to telecommute, representing a drastic shift in workstyles and philosophies.

Successful remote sales reps aren't "lone wolves;" they have to rely on others, whether it's for help navigating their CRM, creation of collateral and messaging or a key piece of research or intelligence that will break a deal open.

In short, the key to modern-day sales success is collaboration, enabled by both the technology and the environment that nurture a collaborative culture and put everyone—not just sales—into a position to excel. In a 2014 study of global sales best practices, 94% of high performers collaborated across departments to pursue large deals, as compared to 43% who did not. For a department that's always on the lookout for every competitive edge it can get, those are significant numbers.

Here are some of the benefits of a collaborative sales culture and some ways that you can enable it in your own organization:

UP-TO-DATE COLLATERAL

Nothing is more cringe-worthy to sales and marketing leadership than finding out their field reps are making pitches with outdated product information or messaging. A collaborative sales culture thrives on moving quickly, adapting to today's lightning-fast product iterations and strategic pivots. Using tools such as Box and Salesforce.com, your sales teams can always be assured of having the most up-to-date collateral; a change on marketing's end is instantly distributed to your sales teams, regardless of where they are or what device they're using. By more closely aligning with marketing, sales can be confident that they're armed with the latest and greatest information and leadership knows that everyone is communicating. Everybody wins.

CONSISTENT MESSAGING

Another benefit of collaborating on files such as pitch decks and product sheets is keeping your company's message consistent. By aligning closely with product marketing, for example, you can ensure that the way sales is presenting your company and product brands reflects the messaging on your website, in customer emails and in content offerings such as eBooks and white papers. In a survey of more than 420 B2B sales and marketing professionals, 40% of respondents said that close alignment with marketing results in better lead conversion and closed deals—again, everybody wins.

QUICKER RESPONSE TIMES

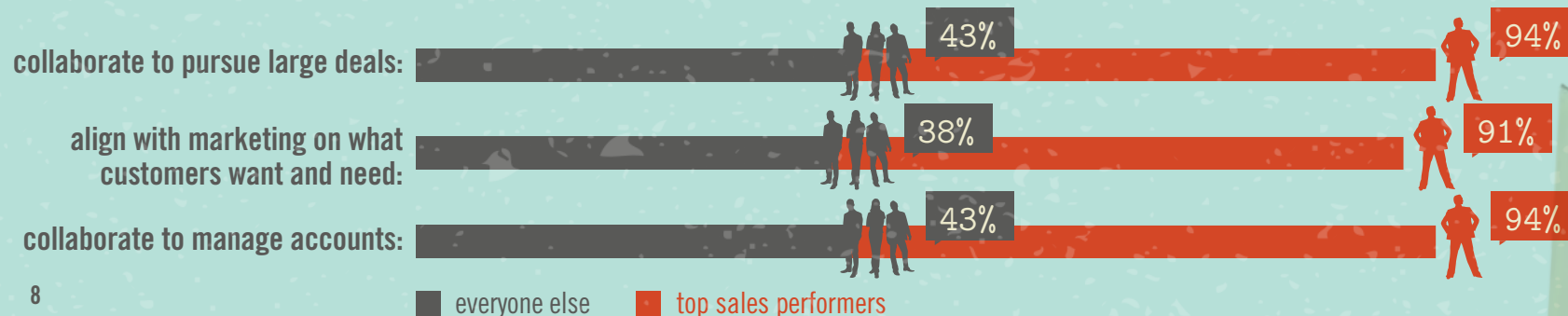
When responding to a competitor's move or an objection from a prospect, time is often a factor. But what if you don't have the answer handy? Collaboration tools help you leverage the knowledge and expertise of everyone in your organization, not just sales itself. Perhaps you need to pull in a tech heavyweight to answer some in-depth product questions or a sales peer from another channel

to tackle LOB-specific issues. With a unified, collaborative process in place, your reps can get the answers they need quickly and easily by reaching into your organization's collective knowledge base rather than being expected to know it all themselves. And best of all, it gives everyone a role to play in closing deals and driving revenue.

CROWD-SOURCED STRATEGIES AND TACTICS

Finally, sales success doesn't happen in a vacuum. The beauty of a sales team is that you can learn together what works and what doesn't. However, if that information isn't clearly and visibly documented and shared, you're missing out on spreading that goodness with the entire team. Cloud-based collaboration tools give you a place for that information, a dedicated space where everyone can document their successes and failures, and the team can learn and improve as a unit. This leads to overall higher close rates, higher quota attainment and better revenue numbers company-wide. And by sharing success and best practices across the entire team, you can improve morale and encourage adoption of your collaboration tools.

WORLD-CLASS SALES PERFORMERS



AREAS OF GREATEST



BLAZING THE TRAIL

SALES HAS TO LEAD THE WAY



By Jonathan Farrington, CEO, Top Sales World

Due to its inherently competitive nature, sales as a department has always forged the way for new technologies, processes and practices. Sales professionals are always looking for that edge, a way to be faster, more mobile and more effective, and in today's business climate that often means relying on the latest and greatest technologies.

However, let me be perfectly clear: technology cannot and will not replace core sales competencies. These tools enable sound sales processes, but they do not replace them. Solid communication skills, staying on-message, follow-up persistence and good old-fashioned common sense will always be more important than any technology.

However, intelligently leveraging this new generation of sales tools and methodologies alongside a well-defined and well-communicated sales strategy can give you and your sales teams the edge you need to close more deals more quickly.

Sales professionals have always been innovators, rule-breakers—even trouble-makers. That rebellious spirit has led to the sales revolution we find ourselves in, where content, social and collaboration are the order of the day.

AND THE SECRET FOR SALES TO STAY AHEAD OF THE CURVE AND THE COMPETITION?

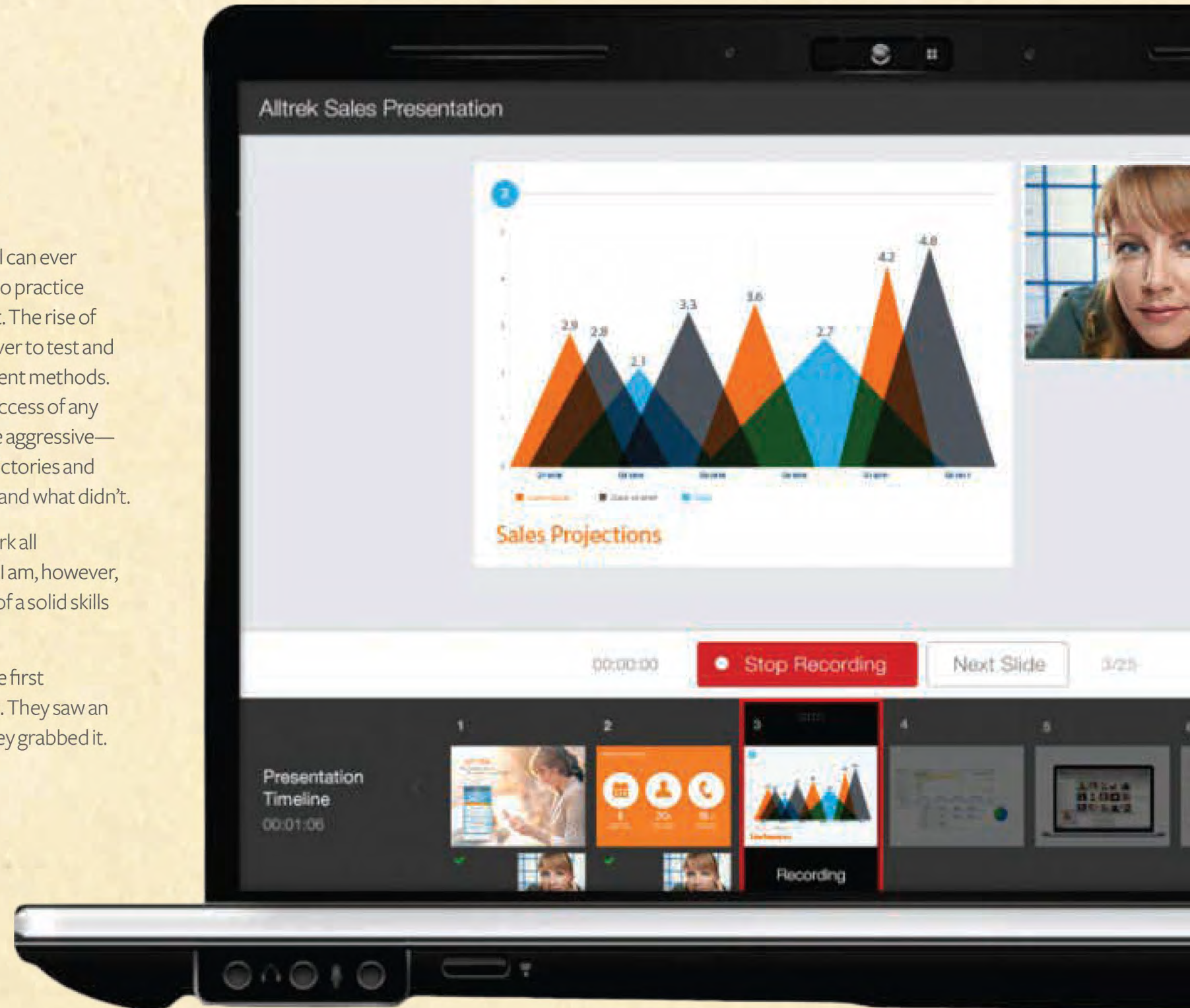
Sales has to continue to lead the way. No tool can ever be good enough, no process so sacred and no practice so ingrained that sales is afraid to challenge it. The rise of SaaS and mobility have made it easier than ever to test and evaluate new communication and engagement methods. And the sales department is so vital to the success of any organization that they can afford to be a little aggressive—testing the boundaries, learning from their victories and defeats and reporting back on what worked and what didn't.

Now, I'm not trying to say that you should shirk all responsibilities and give IT the middle finger. I am, however, encouraging you to try new things—on top of a solid skills foundation.

Remember: someone out there had to be the first salesperson to close a deal thanks to a Tweet. They saw an opportunity, one without precedent, and they grabbed it.

Are you brave enough to do the same?

Someone out there had to be the first salesperson to close a deal thanks to a Tweet.



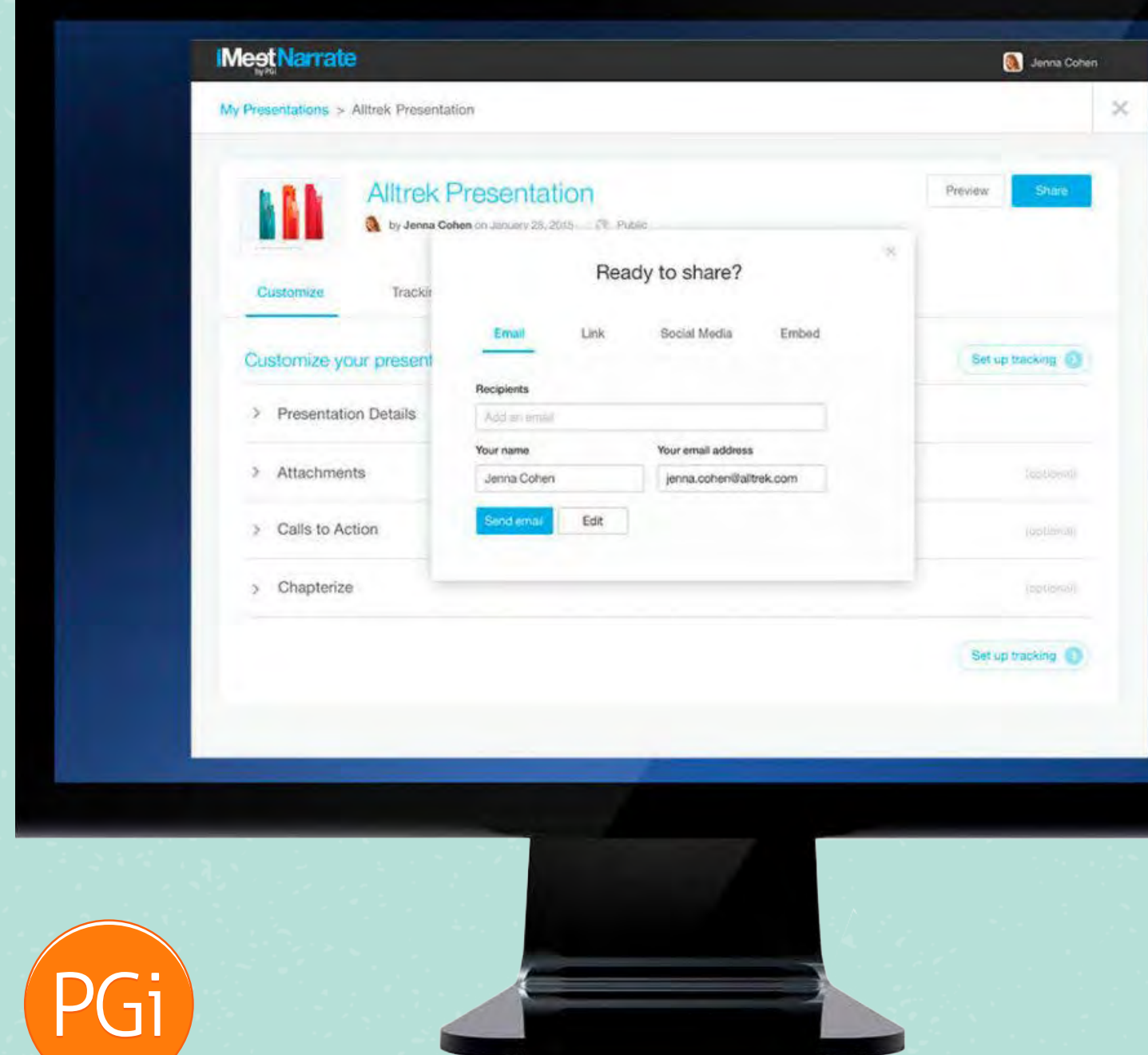
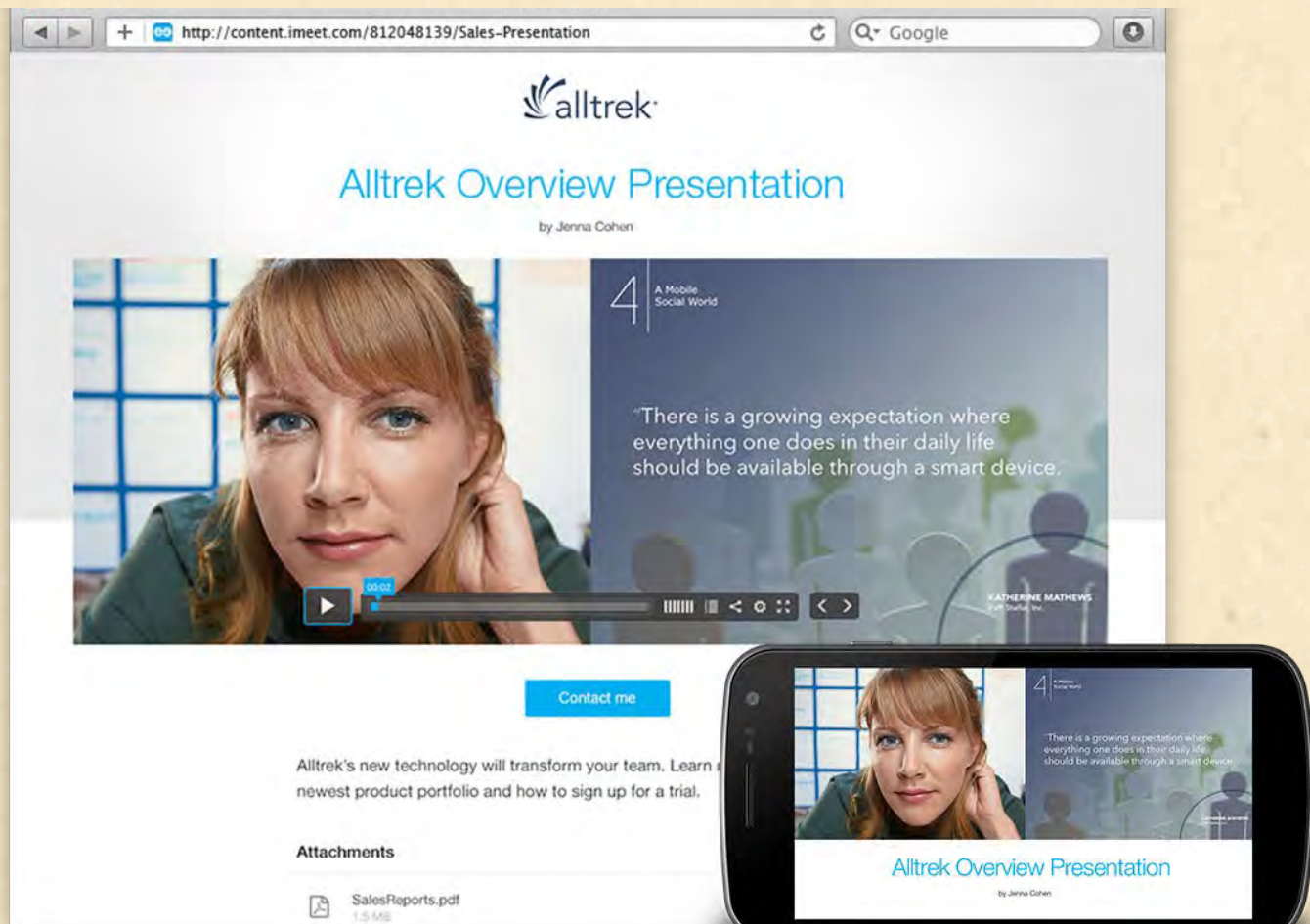
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iMeet Narrate by PGI

iMeet Narrate from PGI makes it easy to create highly engaging videos and presentations for your prospects so you can differentiate yourself from other sales calls. Simply record your presentation through iMeet's easy-to-use interface, send via email and start tracking the results.

Our dashboard tells you if the prospect opened your email, what content they viewed and even integrates with Salesforce, which puts all your sales data in one place. In addition, iMeet Narrate alerts you when your email has been opened, helping you determine the best leads to pursue.

iMeet Narrate helps you engage customers, track results and close more deals—and it's coming soon. To learn more visit www.pgi.com today.



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Meg lives and works at the intersection of people, business and technology. With over 10,000 hours and more than 20 years in Enterprise Applications, she is skilled across a broad spectrum of functional domains and technologies. She is a mom, technology executive, keynote speaker, blogger, patent holder, intrapreneur, idea generator, change agent, disruptive technologist and enthusiastic TED conference attendee. You can follow her on Twitter [@MegBear](#) or connect with her on [LinkedIn](#).



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Brands sell with stories. Always have, always will. That's why Caitlin is a storyteller first, content marketer second. In 2011, Caitlin founded Clear, a content marketing agency that partnered with technology enterprises such as Google, LinkedIn and Marketo to craft powerful stories that sell. She successfully transitioned the company in 2014, when she joined Skyword to lead West Coast growth. Learn more from her thought leadership on the Content Standard: www.skyword.com/contentstandard/author/sw-38413/



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As founder, senior vice president and general manager of Central Desktop, Isaac oversees business strategy and sales for the company. Isaac has a proven record in both early-stage technology companies and enterprise sales and marketing. Isaac studied English Literature at Ambassador University in Texas and the University of Northern Colorado Graduate School. He is an active member in the local tech community, where he serves on the advisory board for Innovate Pasadena to drive technology and design awareness for the Greater Pasadena area. Isaac also serves on the UCLA Extension Small Business Management and Technology Advisory Board.



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Amar is a consummate business development, sales and marketing leader with a passion for social media technologies. With over a decade of experience, he has been providing technology and digital marketing solutions to some of the largest organizations in North America, and he has been responsible for introducing and implementing marketing and sales strategies for new products and services. Connect with Amar on [Twitter](#) and [LinkedIn](#).



JAMIE SHANKS, CEO, SALES FOR LIFE

Jamie is one of North America's leading Social Selling experts. He has personally built Social Selling solutions in nearly every industry, ranging from start-ups to Fortune 500 corporations. Before starting his first sales agency, Jamie was the Director of Sales at two SaaS software companies—Captive Channel Corp. and Firemex Inc.—building their businesses from infancy to profitability. Connect with Jamie on [Twitter](#) and [LinkedIn](#).



JONATHAN FARRINGTON, CEO, TOP SALES WORLD

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