



Module 1: Why Social?

Okay, okay we know. You bought a guide to prospecting on social... and we're gonna start with "why social?"

So let's clear the air.

Our Perspective

Social isn't just for personal branding.

Social isn't just for content creators.

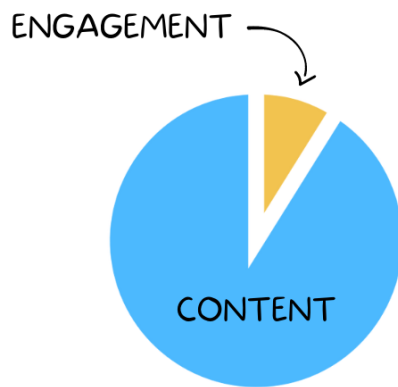
Social isn't just for building side hustles.

It should be your **primary channel for outbound prospecting**. That's why we built this guide.

There's so much noise about "social selling." It's pretty likely this isn't the first guide or playbook you've purchased (we bought all of them too).

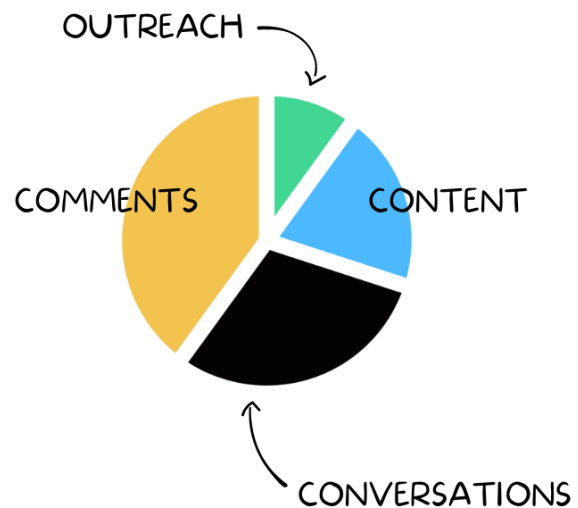
So what is it really?

WHAT PEOPLE THINK SOCIAL SELLING IS



**B2B
POWER
HOUR**

WHAT IT ACTUALLY IS



If you've been led astray by a LinkedIn influencer or some content creator, **we don't blame you.**

Most people who talk/write/sell LinkedIn have no consistent, repeatable process for generating leads besides "create content and they will start speaking to you" (what people think it is).

We built this guide so you could scale a consistent, repeatable process for generating leads on **both** inbound & outbound. Yes, there's outbound on LinkedIn. No, it's not just InMails and connect-and-pitches. It's what this guide is built to help you do.

Why should it be your primary channel?

We understand that you have activity metrics to hits. Calls and emails. This guide is built to complement your existing efforts. Our routines don't take any more than 30 minutes

to complete.

We don't expect you to immediately replace everything with social. But consider this:

- Cold call connect rates average 2%.
- Cold email response rates average 5%.

You probably follow plenty of people who help you boost those numbers. Your numbers may well be higher! But let's be honest: **why don't buyers respond?**

The truth is that they have chosen to tune you out. It's nothing personal. There's just too much information in the world. Too many Netflix shows and newsletters, too many webinar sequences and way way way too many cold outbound pitches.

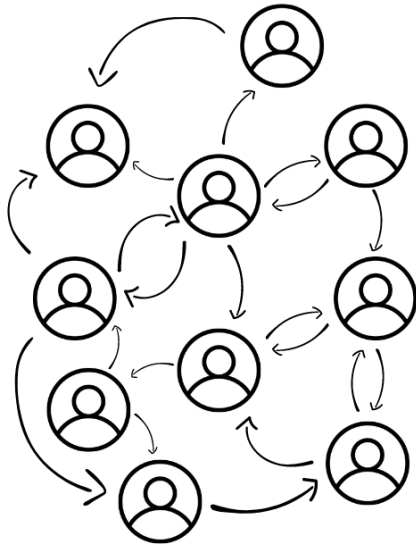
Buyers on social media don't use it to be sold to. They use it to connect with their peers, learn about their industry, and engage with others.

And they also use it to buy — on their terms.

This is called "Dark Social." Dark social is word-of-mouth in the digital era. It's when buyers turn to their networks, their DMs, their Slack communities and ask for recommendations. And alternatively, when buyers can go to their networks and make an offer that makes sense.

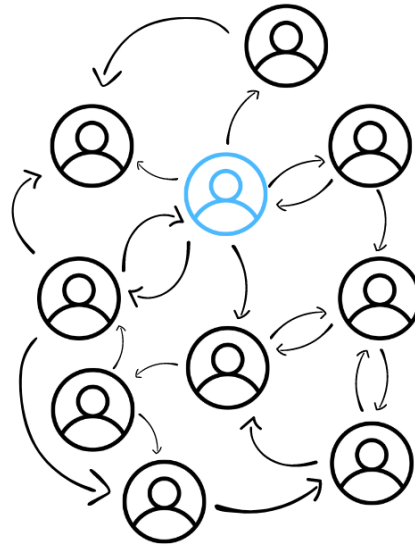
If you do it right, you look like the little blue person on the right:

THE DARK SOCIAL WORLD OF B2B



**B2B
POWER
HOUR**

THE SOCIAL SELLER IN DARK SOCIAL



You'll become "embedded in dark social," a phrase we use a lot around here.

Here's what happens:

- Your buyers will know you when you reach out (outbound)
- Your buyers will reach out to you because they know you (inbound)
- Your buyers will trust you because of your efforts (outbound + inbound)

This is the opportunity that social provides. No more anonymous selling, no more cold email sequencers. Trust, great relationships, and deals that move quickly.

All the personal branding stuff is just a side benefit 😊 Let's dive on in!

Next:

 Module 2: Using this Guide



Module 2: Using this Guide



You have lifetime access to this playbook. Looking for improvements? Make sure to give us feedback.

We built this guide from 200+ experiments and counting.

Every question you have about connection requests or content, we've (probably) answered in this guide. If we haven't, make sure to give us feedback.

But answers alone aren't useful. We've built this guide around two principles.

- Build context.
- Create roadmaps.

Every section has context. These pieces help you *think* better. They help you change the way you think social should work.

But we also have roadmaps. These are tactics. Specific things you can *do*. After we've set up the way to think about the play, we give you the plays to actually run (all backed by our experiments).

This guide has 5 sections.

1. **Building Credibility**. START HERE. This is the foundation of all prospecting on LinkedIn. If you cannot build credibility, you won't succeed.
2. **Outbound Prospecting**. We introduce what outbound actually looks like on LinkedIn, how to run it, and specific plays you can use to book meetings.

3. **Building Your Lifeline on Inbound.** Not every buyer is in the market today. You need to build a long-term lifeline for meetings + deals through inbound. We show you how to do that.
4. **Strategic Accounts.** We break apart how LinkedIn can be used to break into larger accounts and for larger deals (6 figures+). If you're not selling into mid-market or enterprise, this section isn't for you.
5. **Daily Workflow.** Now that you have all the context and plays, how do you build out your day to stay in the driver's seat? Social can be overwhelming and we'll show you how to keep it under control.

We recommend working through the guide in the original order at least once. Lots of the later modules build on earlier modules.



Your daily routines should be informed by what will make the most impact. If you don't understand how to make the most impact and why, you'll just waste time. That's why we've put Daily Workflows at the very end.

And of course: once you've read through the whole guide, you can jump back in wherever it makes the most sense.

Next:



Module 3: The Credibility Challenge



Module 3: The Credibility Challenge

1. What stops you from being successful in sales?

Think about it. Not just on social, but in selling in general. Why don't people just see your email or your DM and go “😄😄😄 WOW WHERE HAVE YOU BEEN?”

Obviously – maybe your pitch isn't all that great.

But more fundamentally: **you're not seen as credible.**

We prefer the way Franklin Covey thinks about credibility:

1. **Can I trust you?** (Integrity)
2. **Are you a good person?** (Intent)
3. **Can you actually solve my problem?** (Capabilities)
4. **Are you as good as you say you are?** (Results)

These are questions you might have heard during a buying process. Or, if you've been a part of enough sales, you can identify these as subconscious drivers of the questions your buyers ask on calls. One buyer *explicitly* told us “I hope you're as good as you say you are” on a call once. That's a credibility challenge.

Think about the amazing influencers you follow. We bet they have answered each of these questions in their own way.

The most important piece – **building credibility takes time.** It's not a one-and-done thing. It's why sales takes more than one conversation if you don't have a deep relationship with the buyer. They're assessing your credibility.

2. What does credibility look like on LinkedIn?

The cop-out answer: lots of followers.

While it's true that having a lot of followers *implies* that you have credibility, we've found it isn't actually what buyers are looking for.

Here are three key metrics on LinkedIn that show you have a credibility challenge:

- Low connection acceptance rates (below 30%)
- Low response rates on DMs (below 50%)
- Lots of profile visits but no inbound DMs

If you send out 100 blank connection requests and you only get 30 to say “yes,” you have a credibility challenge. If you send out 10 DMs and only 5 respond, you have a credibility challenge (on top of a potential messaging challenge). If you get 1000 visitors in 90 days but zero people reaching out, you have a credibility challenge.

On LinkedIn, **credibility looks like:**

1. A well-designed profile funnel that educates and connects with buyers
2. An established network of engaged customers, peers, and influencers

The 🍒 cherry on top would be having lots of followers or a big, noticeable splash. But it is not a prerequisite to selling effectively on LinkedIn. A good profile and an engaged network *are* required.

3. Should I eventually become an influencer then?

A reasonable question.

Becoming an influencer, getting your 10K followers, posting content all the time — if that's your goal on LinkedIn, that's great! Our Inbound section of this guide will help you do that.

Having that many followers does help with the credibility challenge. Social proof from our peers is an undeniable influence on who we think is credible vs. not. Becoming a content creator and an influencer is helpful.

But honestly: it's also overrated. If your superpower is social, go for it. Otherwise, stick to the fundamentals outlined in this guide and don't worry about your follower count. You'll be able to demonstrate credibility in other ways.

Next:

 [Module 4: Building Your Profile Funnel](#)



Module 4: Building Your Profile Funnel

1. What is a Profile Funnel?

Your LinkedIn Profile is your landing page, your business card, and your main way to demonstrate the reason people should connect with you. You need to have a complete LinkedIn profile to build credibility with your buyers.

The main questions you should be answering:

1. Who are you?
2. Who's your audience?
3. How do you solve their problems?

Let's break down the components of your profile you need.

2. You Must Pass the 3 Second Test

The key test we use to qualify a profile is **the 3 second test**.

In the first 3 seconds when someone views your profile, do they have a reason to scroll?

This is determined by:

- Profile photo

- Cover photo
- Headline
- Hashtags (if creator mode is on, optional)

Profiles that **pass** the 3 second test:

- ✓ Get high (80%+) connection request acceptance rates without any personalization
- ✓ Get higher engagement with featured links
- ✓ Get DMs based on their profile CTA

<https://share.descript.com/view/5j8nZiJRQ4F>

Optional: Create Benchmark Data

If you really want to be the 🧐 mad scientist 🧐 of your profile, run these tests. These are completely optional, but if you're data-driven it can help see whether your profile is passing the 3 second test.

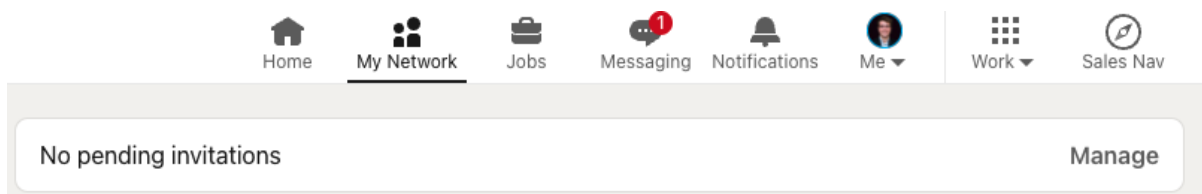
▼ Test 1. Your Connection Rate

- Create a lead search inside Sales Navigator for your region and industry. Use the filter "Spotlights > Activities and Shared Experience" and select Posted on LinkedIn in 30 days
- Filter by 2nd degree connections.
- Filter by preferred function.

(For example we may narrow down to US/Canada, Computer Software, 2nd degree connections in Business Development)

- This will still provide a large list. You might look at skipping over CEOs and C-Suites for this test.

- Send blank connection requests to 20 people per day for 5 days. (100 MAX per week)
- Measure the number of people who accepted your connection request vs. those who didn't.



To view your pending invitations, you can click "Manage" in this bar underneath My Network to see all of your outstanding connection requests.

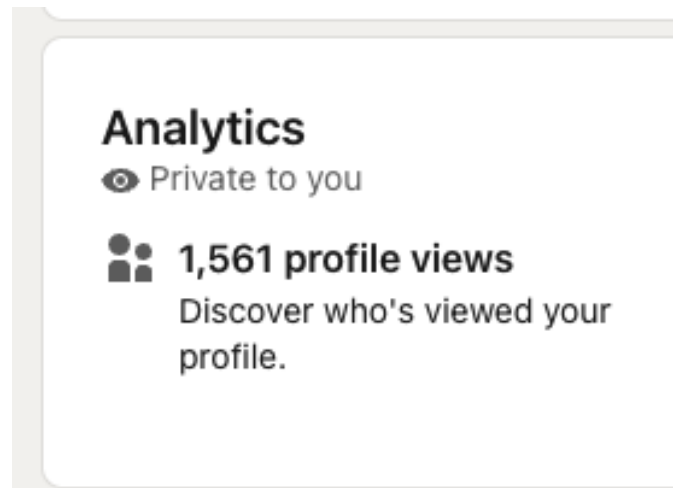
You can track this in a spreadsheet, too.

If your acceptance rate is lower than 50%, your profile doesn't pass the 3-second test.

If your acceptance rate is 50%-90%, nicely done! Your profile still needs work, most likely in the tagline and about section.

If your acceptance rate is 90%+, amazing! This guide will help you massage the finer points of your profile, but you're well on your way.

▼ Test 2. Inbound connection requests



On your profile, you can view profile views (here's an example). By engaging on the platform, you can boost the number of these profile views.

- If your profile views are below 500, go and engage on the platform through comments and content before running this test.
- If your profile views are above 500:
 - Track the number of inbound connection requests (people who send a connection request to you) over a 5 or 7 day period.
 - Just jot down the names of the people connecting with you.
 - Does that number exceed 10 in a week?
- If your inbound connection requests are above 10, your profile passes the 3-second test.
- If your requests are below 10, your profile still needs work!

3. Write a Captivating Headline

This is the little “preview” text that shows next to your name.

Write a headline about who you help and how you help them. This is the first real impression someone has of what you do. It ties your face & name to credibility.

You should create a headline that is value-focused, not sale-focused. The difference is how focused you are on “how you help people” (value) vs. “what your company provides” (sale). It may take a few attempts and some testing.

- *Example sale-focused headline:* “Enabling global marketing teams and their leaders to optimize budgets and maximize revenue impact”
- *Example sale-focused headline:* “The video marketing your business needs for customer and growth acceleration”
- *Upgraded value-focused headline:* “Helping CMOs with better budgeting”
- *Upgraded value-focused headline:* “Short-form video content that raises eyebrows”



What’s the real difference?

The real difference is between telling someone what you do and trying to sell someone in the headline. When you write a value headline, you entice a conversation. It’s like breadcrumbs, begging for their attention. What does it mean you “help B2B sales teams master social selling”? What does it mean to “talk about the future of sales”?

When you try and sell by providing everything up front, you’re not enticing a conversation. You’re just pitching. That pitch turns a lot of people off and it doesn’t give them a reason to engage.



Proof in the pudding

Accepted blank connection requests to 2nd degree connections increased from 25% to 50% when Morgan’s headline changed from a sale-focused headline to a value-focused headline.

▼ Headline Templates

- “I help _____ with _____ by _____.”
- “Helping _____ with _____.”
- “Exploring _____” or “Focusing on _____”

The best way to test is to send 100 connection requests per week with a few different headlines, trying one headline per week for 3-4 weeks. Measure the response rate you receive.

▼ Pro Tip: Speak to a Category

If you're struggling to write your headline, here's a tip. Speak to your category.

Nate Nasralla: "I'll teach you to sell with your buyers, not to them."

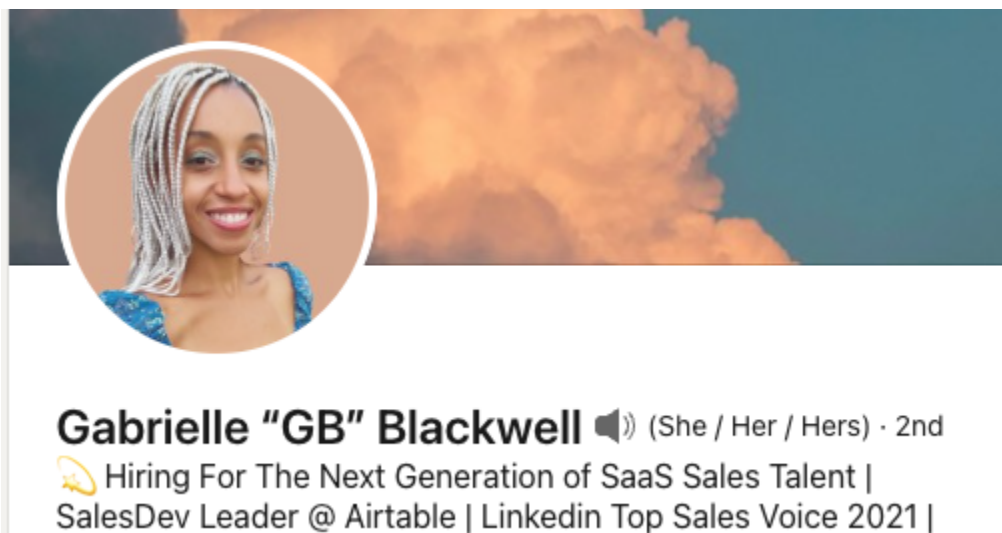
Nicholas Thickett: "Exploring (& challenging) the future of sales 🤖"


Linda Melone: "High-Converting Copy for B2B Brands"

These are just a few examples of *many* (see the Good Examples section) who speak to their industry category. Nate is speaking to the enterprise category, Nick is speaking to the sales training category, Linda is speaking to the copywriting category.

Each of these are good options to test out in your market.

▼ Good Examples of Headlines







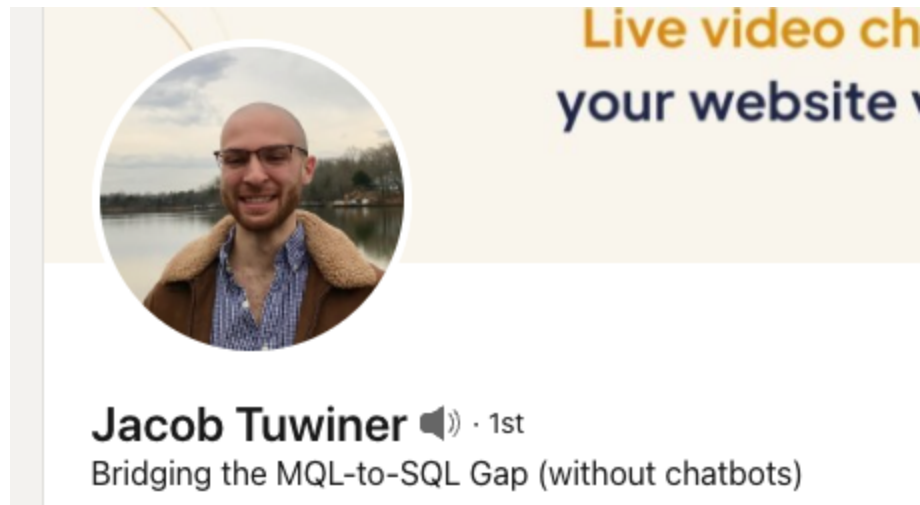
Florin Tatulea 🔊 · 1st
BDR/SDR Leader | 2x Top 10 LinkedIn Sales Star | B2B SaaS Sales



Leslie Venetz (She/Her) · 1st
Transforming sales into a more inclusive, respected profession 💖



Brooklin Nash 💡 🔊 (He/Him) · 1st
creating B2B content that starts with data & conversations |
#BeamTeam



4. Profile Picture

The standard advice is to make sure you have a **smiling photo** that properly frames your face (so people can see who you are)! If you want to stand out in the feed, add a background color or colored “ring” to the photo. You can do this inside an editor like Canva.









Proof in the pudding

Nick had a very serious headshot for many months and got his average connection rate into the 60s and 70s. When he switched to a smiling photo, his connection rate jumped to 90%.

5. Value-First Banner

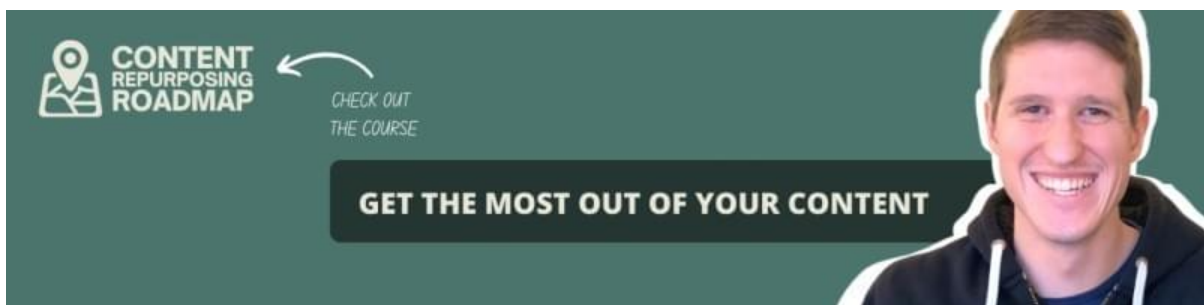
Your banner is the first thing someone sees when they land on your profile. Remember, they've already seen your name, photo, and headline. Now it's time to really wow them and prompt them to scroll!

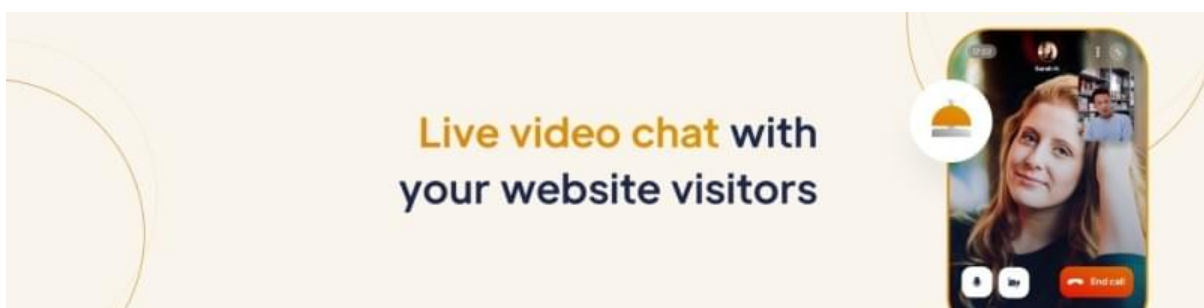
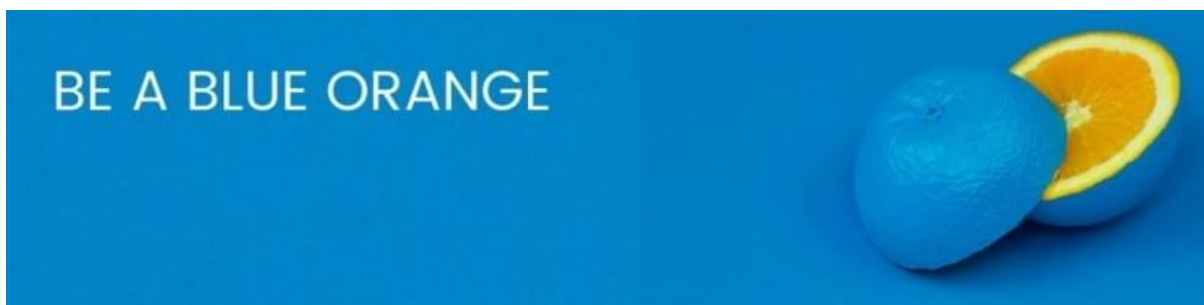
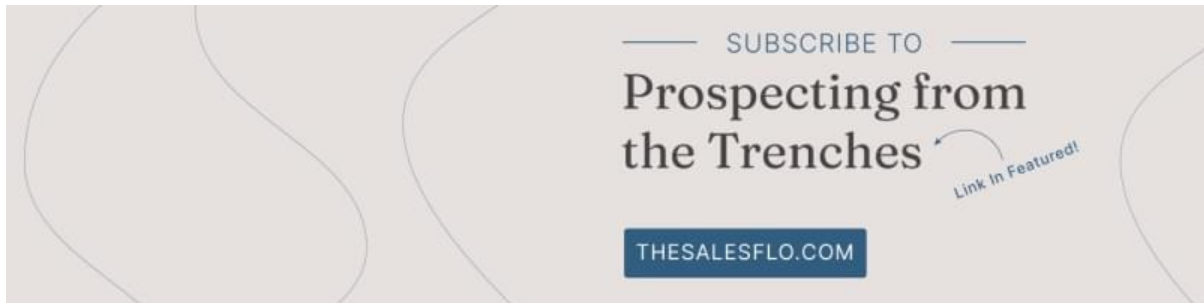
Do's and Dont's

-  Do: make sure everything is readable, clear, and easy to see. That means bigger fonts and little clutter.
-  Do: use your company's brand, but add useful value (more on that below). You can use something like [Canva](#) to add text or design something quick that will look good.
-  Do: add a primary position or value statement to the headline. Morgan and Nick use the central positioning of B2B Power Hour, but there are lots of ways to do this. If your company's banner has their value prop inside it, then you're probably set.
-  Do: Keep it simple! The point is just to get people interested so they'll scroll down and learn more about you.
-  Don't: use a photo or just a generic background image with your company's brand on it. It doesn't communicate anything about you or why people should connect with you.
-  Don't: add Phone Numbers or specific URLs. The point is to catch their attention so they scroll further down to your About section, not call them immediately to action. URLs *can* be added, but only the main domain (no "[b2bpowerhour.com/sellers-guide](#)" or any specific URLs).

- ❌ Don't: use more than one central offer or value-proposition. It's fine to add more about who you serve or what you do as bullets or topics if you'd like, but don't add a book & a company brand or multiple products to the header. It's confusing and a confused mind always says no.

▼ 📷 Some example banners we like





6. Write a compelling About section.

This is the area that is going to take the most of your time. It's also not going to be perfect on the first attempt. The best way to think about the About section is it's an asynchronous credibility challenge.

Think of it as a mix between an asynchronous pitch and a personal story. Depending upon your industry, it may make sense to lean on one vs. the other. Are your buyers receptive to more personal stories? Or is it more buttoned up?

Here are some examples we like.

▼ Example 1: SDR Asynchronous Pitch

About


Do you work with sales reps, coaching them to have better, more successful cold calls, discovery calls, demos and/or face to face meetings?

Do you find yourself frustrated, that so much of your revenue comes from a disproportionate number of reps in your team, i.e your 'top performers'?

Do you lack true visibility into why some of your team's sales conversations are successful and others aren't?

Does it take you too long to onboard new hires and get them contributing to your team quota?

Sales Leaders have adopted our coaching platform to unlock the hidden value tucked away in their team's sales conversations, our tech and AI insights provides instant clarity into what makes your top performers more successful and enables you to coach your entire team to have better, more effective conversations with their prospects.

Interested? Let's talk 

▼ Examples 2: Nate Nasralla's Asynch Pitch + Story

About

Selling with buyers (not to them), by creating deal champions is my jam.

You'll read a lot about that if you follow me 🙌

Free 1:1 coaching: calendly.com/fluint/coaching 🙌

Writing at fluint.io/blog 🙌

The backstory, if you're curious:

B2B sales has been my whole career, and I love it.

Sometimes, I'm founding the products I sell. Other times, building teams to sell.

In every case, sales = creating + closing new deals. Trouble is, I realized sales reps don't close deals. Buyers do.

That's because all the make-or-break moments in complex deals happen without sales reps in the room. Buying decisions are made during internal meetings — where champions pitch their own team, in their own words.

AE's know how to sell. But they don't always have a great way to help their champions sell when they're not around. It's why I founded Fluint — to help sellers stop losing deals when they're not in the room.

I write long-form and tactical content on this approach, Buyer Enablement, at fluint.io/blog 🙌

▼ Example 3: Adrianna Vidal's Story

About

high school dropout 🏠 community college dropout
🏠 retail salesperson 🏠 property manager 🏠 sdr

I stumbled into sales by accident and mostly out of desperation.

I was freshly 18, and I was broke as hell.

For weeks I had been applying to basic customer service/sales jobs online.
But wasn't getting a single call back.

I resorted to printing out my sad little resume, and walking around shopping malls, basically begging for a job at every single store.

Eventually, a manager at Men's Warehouse took pity on me, and offered me a position renting tuxedos at minimum wage.

In between clients, I would leave the rental desk (yes I got in trouble for this a lot) and hang out on the sales-floor, helping clients pick out their next suit for an interview or prom.

Soon I was out-selling the commissioned sales reps. And I was addicted to it.

That job led me to 4 years in retail, selling everything from luxury skincare, to \$500 swimsuits, to engagement rings.

From there I spent three years in multi-family property management, building out processes to increase lead quality, conversion rates and resident retention.

I learned a lot, but ended up burnt out and bored.

I knew I didn't want to be on call 24/7 like with property management.
But I also didn't want to go back to the low wages and crazy hours of retail.

I thought I might have to leave sales entirely.
Should I go to college?
Get into marketing?

One day I stumbled across a video about this thing called "saas sales."

"Nah." I thought. "No one would hire me."

But I was so wrong.

I researched and studied, and after a few panic attacks, decided to take the leap.

Within three weeks I had a brand new career as an SDR
(how crazy is that????)

I started posting about my cold calling struggles on LinkedIn, and found an amazing community of industry veterans, founder, marketers and more.

And that led me to my real passion...

💖 Supporting salespeople! 💖

I love to:

- 💖 help newbies get started in their sales careers
- 💖 share strategies, wins and losses in realtime
- 💖 empower sales teams to take control of their processes

📩 If you're a career switcher looking for their first tech sales role 📩
Let me know how I can help you!

Making Your About Section Work

So what makes these example (and other) about sections work?

- They tell a story.
- They invite a specific audience in from the first sentence -- each is clearly targeted with a specific focus on *who* should pay attention to the profile.
- They're split apart in multiple sections for easy reading. It's not a wall of text. Each section is a few sentences.
- They include at least one question -- either a leading question or a prompting question further down. Remember, this is like a pitch! It's important to question because it piques interest and makes people consider what you're talking about.
- They offer a clear CTA at the bottom. Whether it's connecting, sending a DM, sending an email, it's clear that people should "do something" once they reach the bottom of the About profile.

When you write your About section, try a few different versions. Be comfortable that the first About section write-up isn't going to be perfect -- but neither were your cold emails or sales calls! Practice makes progress, and just keep trying to perfect it.

7. Featured Section Tips


1. Because your featured section is from someone who "scrolled" (your profile passed the 3-second test), make sure to always embed at least **one link**. This can be to your calendar scheduler, your company site, a dedicated landing page, etc.
2. Sharing your most popular posts can be interesting, but make sure they're relevant to your overall profile. Clean up any old content that doesn't make sense for your audience!

8. Additional Examples & Help

The cost to edit your profile is zero. So you can change it whenever you want! We change our profiles all the time.

To help you with additional context or examples as you edit your profile, we've recorded a few different live profile reviews. You can watch them in full below.

Profile Review Shows

Aa Name	 URL
Live Profile Reviews #1	https://youtu.be/aszt1Xv3-RM
Live Profile Reviews #2	https://youtu.be/xaDgCTw4gi0
Live Profile Reviews #3	https://www.youtube.com/watch?v=4HweNk_833w

Next:

 [Module 5: Building Your Network](#)



Module 5: Building Your Network

1. You Have 3 Buckets to Fill

Your network on LinkedIn ultimately comes down to three buckets of people:

1. Influencers
2. Peers
3. Engaged customers / prospects

Not every prospect is going to be actively posting on LinkedIn. That's okay. We'll cover reaching those customers in the Inbound section.

By having an active network with some people in each of these buckets, you'll build your credibility. If you already have more than 500 connections and/or you've been active on LinkedIn, this section will be a refresher. We'll be using and re-using these principles in future sections!

2. Find Your Influencers

TASK: Find 5-10 influencers in your industry who are active on LinkedIn and share content that you like and can engage with.

This is a starting point to begin engaging on LinkedIn. The kinds of influencers you should be looking for:

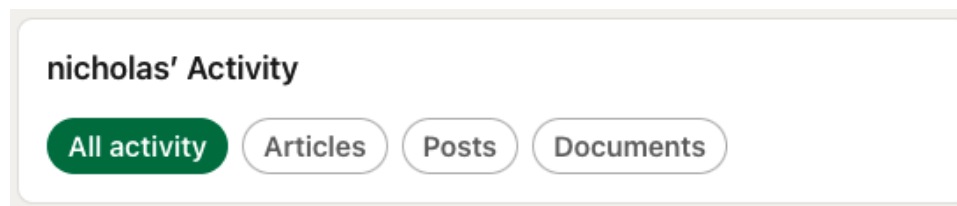
- 5K to 30K followers

- Posts about content that is relevant to your ICP persona
- Posts regularly (minimum 3x / week, preferably daily)
- Has an active comments section (the influencer engages with comments on their posts)

▼ Find Influencers from ICP Accounts

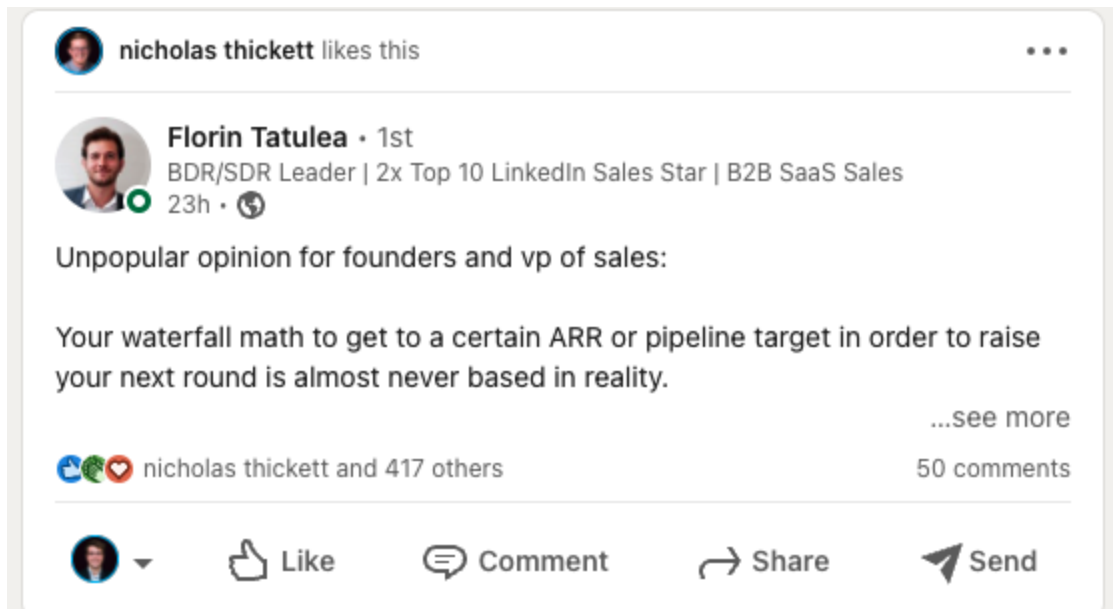
If you already know some active accounts on LinkedIn that you'd like to prospect, you can use their activity feeds to find these profiles.

Step 1. Go to activity feeds of active ICP profiles.



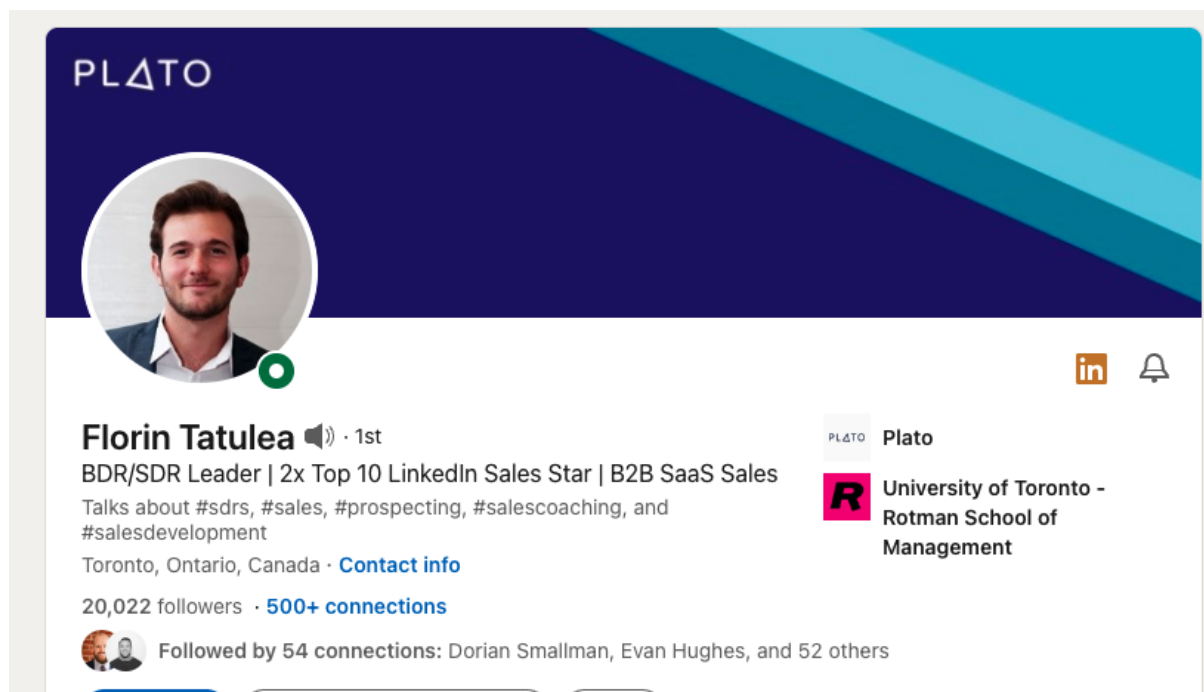
Look at "all activity."

Step 2. Find larger (5K+ follower) accounts that they like, engage, and comment on.



If you were prospecting Nick, you would see he's engaging with Florin Tatulea. This post has a lot of engagement. So, I want to see if Florin is the right fit influencer.

Step 3. Hit the "bell" on profiles (or bookmark them) that fit the right criteria.



After checking out Florin's profile we see he meets the criteria we're looking for.

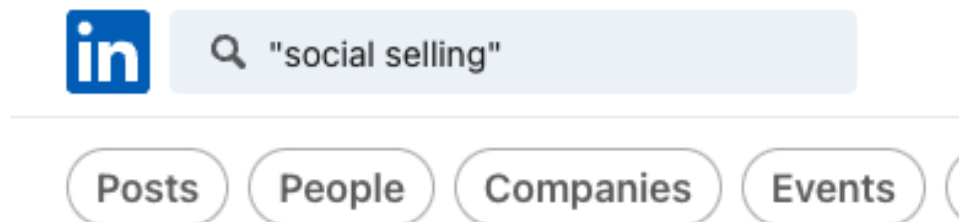
- **Industry fit.** Florin speaks to ICPs in our industry.
- **Follower count.** 5K+ followers.
- **Actively posting with lots of comments.** There are lots of posts and he has lots of engagement.

▼ Find Influencers with Search

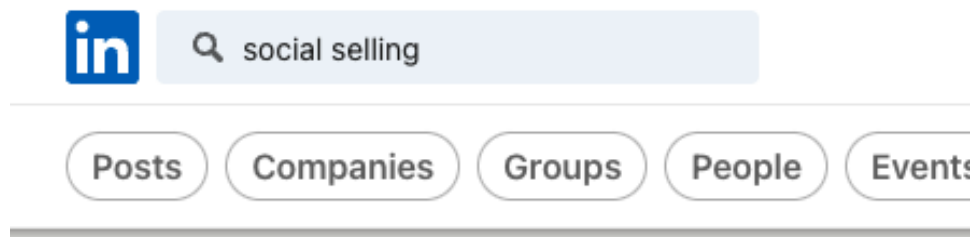
If you don't have ICP accounts yet or you haven't found your influencers yet, you can use LinkedIn's search to find profiles who are active.

Step 1. Alternate between inclusive queries and Boolean Queries.

Boolean queries or "hard searches" force the search to use the entire search keyword.



This **is** a Boolean query. It only searches for the exact match phrase of "social selling."

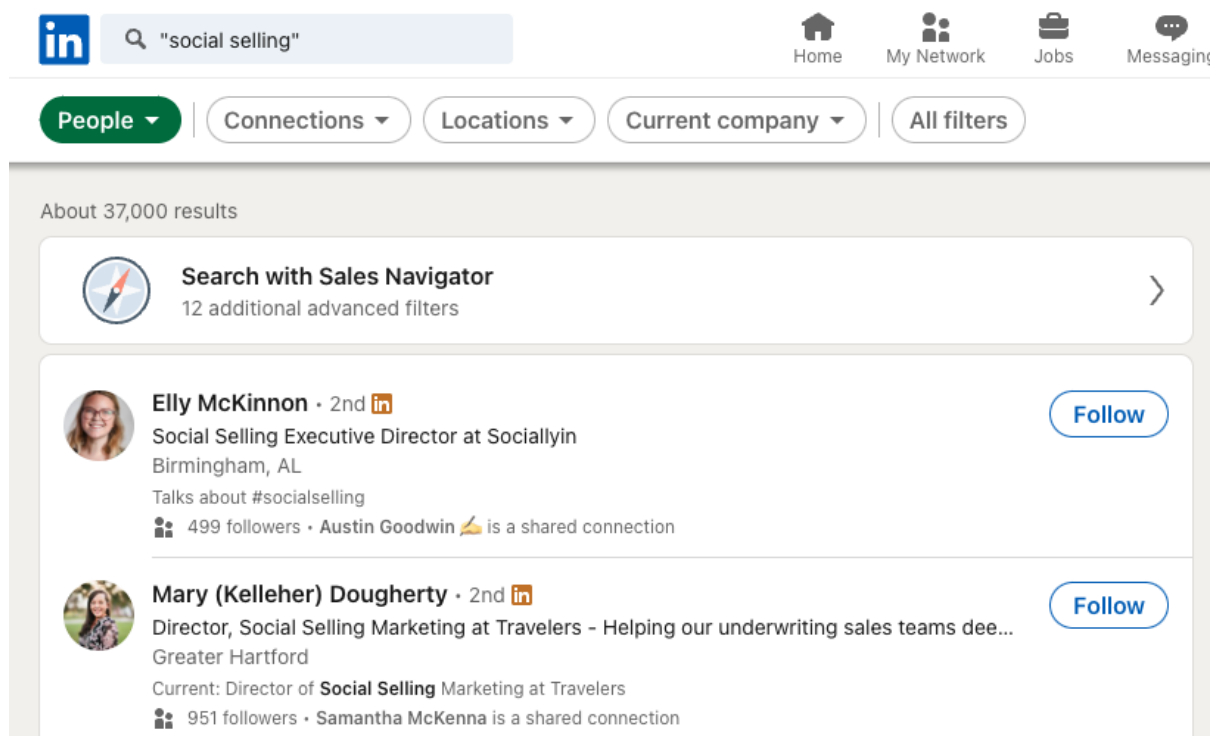


This search is **not** a Boolean query. It is an inclusive query. It will find people who use *either* "social" or "selling" or "social selling" in their profiles. It is very broad and finds a lot of different key terms.

Use the boolean queries to find profiles with exact-match phrasing who are influencers in your industry.

Step 2. Find accounts who have a lot of followers.

Filter the results by People and then pay attention to the follower count in the results list. You can filter down profiles by company or location (among other things) if you have a sense of where the influencers are as well.



Here you can see these profiles are much too small. It may take some time to find the right profiles, which is why we recommend going through people's activity feeds first.

Once you find your influencers, click Follow! You can start engaging on their posts (liking / commenting) immediately. But we'll need these influencers for part of your outbound prospecting on LinkedIn. Best to get them solidified now.

3. Find Your Peers

TASK: Build your network to 500+ connections.

A surprising but consistent result is having 500+ connections is a **key element of having credibility**. If you don't have 500+ connections, buyers will perceive you as "new" or "inexperienced" on LinkedIn, even if you are not.

Peers can be:

- People at your company
- People in the same industry
- People who have the same role or job title
- Recommended: 2nd degree connections

This is where you get to have fun! These peers are likely a lot like you. They either occupy similar roles or have similar professional interests. They're on LinkedIn for the same reasons as you are.



We recommend keeping peer connection requests to 2nd degree connections. It helps broaden your network based on your existing connections. 3rd degree connections are generally a waste of time if they're not a prospect.

Once you find your peers, click Connect! We'll cover the specifics of connection strategies later, but it's safe to say that if you've nailed your Profile in the previous module, you can just leave the connection request blank.


4. Find Your Customers

Well, well, well. We've arrived to our first real prospecting part of the guide. Right?!

Nah. Just kidding. We're going to cover this more in depth inside the Outbound section because connecting with your customers requires more thoughtful strategy than you might realize.

Click below to jump in.

Next:

 [Module 6: Rules of Engagement](#)



Module 6: Rules of Engagement



Welcome to Outbound Prospecting on LinkedIn. In these modules, we'll be covering how to run outbound campaigns on LinkedIn. You'll learn the basic rules of engagement, how to prep for your outbound campaign, and how to book meetings with prospects.

1. The Vampire Sales Rule

For every play we recommend, except one, you should be obeying **the Vampire Sales Rule**.

In folklore, vampires are not allowed into your home *unless they are invited in*.

The same applies to your pitch.



You are not allowed to pitch unless you are invited to.

If you keep to this rule, your engagement strategy will transform. It changes the game. It will automatically distinguish you from every spam artist on LinkedIn. It also will change the way you're engaging with prospects.

We've built this guide around the Vampire Sales Rule **because it works**. People do not log-in to LinkedIn to be pitched. They log-in to connect, engage, and be inspired. If you

can stick to the Vampire Sales Rule, you will be focusing on the right things: the things buyers want.

2. Build Credibility *Before* Pipeline

This is where every seller gets tripped up. Because buyers don't come on to social to be pitched, it is going to take more time to get them into a meeting. They have a strong mental spam filter and only look to people who have — guess what! — credibility.

Remember: credibility is made up of four parts.

1. **Can I trust you?** (Integrity)
2. **Are you a good person?** (Intent)
3. **Can you actually solve my problem?** (Capabilities)
4. **Are you as good as you say you are?** (Results)

Whether you're doing traditional outbound on phones/email or you're using social to sell, you have to have credibility in the buyer's eyes.

TRADITIONAL SALES



SOCIAL SELLING



What happens is you're building credibility pre-pipeline.

If you're using email or phone (traditional sales), it's pretty quick to get a buyer into pipeline. They're one email or phone call away. The credibility challenge becomes apparent once the buyer is in pipeline. This is why account executives are trained on discovery & demos so much, because they need to build credibility.

In social selling, most of that credibility is built **before** the buyer is in your pipeline. This means the "time to pipeline" is a lot longer from first-touch to qualified deal. The trade-off is that the deals move much quicker because you've already solved for many of the credibility challenges.

What does this all mean?

- You'll spend more time "warming up" leads on social through consistent engagement

- You'll spend more time per lead trying to book the meeting than you would on traditional sales (on outbound)
- You'll spend less time per lead trying to close the deal (on both outbound & inbound)

3. LinkedIn is a Swiss Army Knife. Use It.

If you have a LinkedIn profile without Sales Navigator, here's what you have at your disposal:

- Connection requests
- Commenting
- Posting content
- Sending DMs
- Creating or joining groups
- Hosting events
- Attending events

And honestly so much more. You have so many tools at your disposal not called "InMails" that if you're only using InMails, you're really limiting your efficacy on outbound. LinkedIn provides you so many tools to engage with your prospects. Use them.

Next:

 [Module 7: Fundamentals of Social Outbound](#)



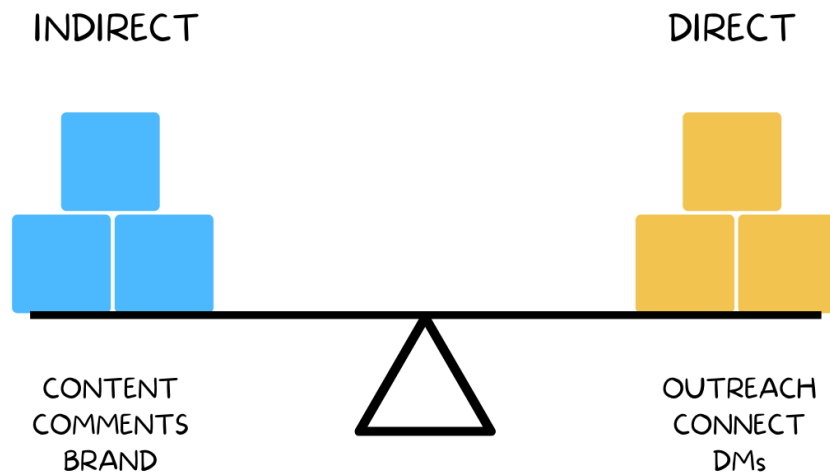
Module 7: Fundamentals of Social Outbound



This is a **context-building** section. The point of this section is to help you understand *how* social selling works and what you'll actually be doing.

1. Social Selling is a Mix of Direct & Indirect

SOCIAL SELLING IS A MIX OF...



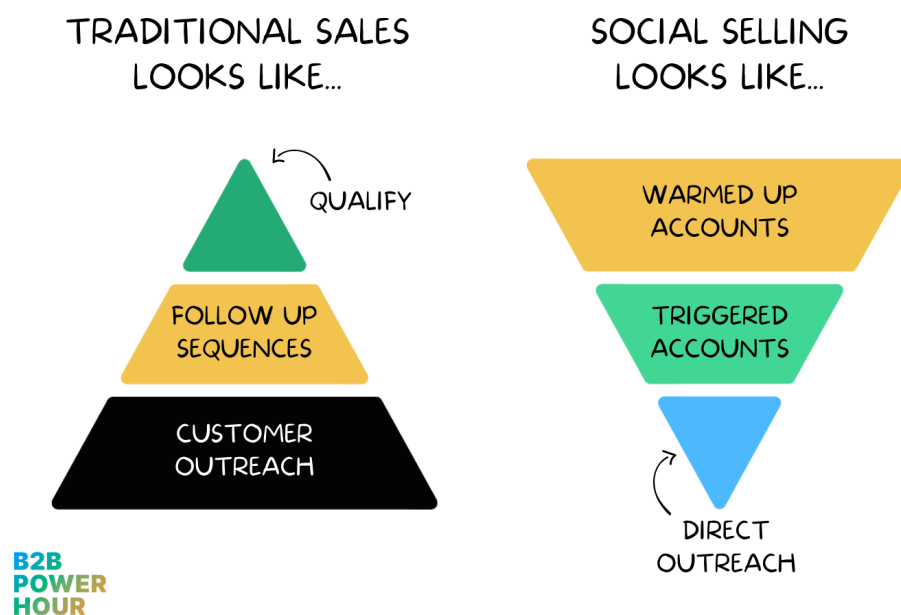
B2B
POWER
HOUR

Prospecting on social isn't just connect-and-pitches. In fact, you're going to use a mixture of indirect and direct methods to engage with prospects.

- If you only use direct, you're just using social as a sales channel. It's so much more than that.
- If you only use indirect, you're just becoming a content creator. That's not the point of this guide.

By using both in equal measure, you're using LinkedIn to its full potential.

2. Social Selling Starts with Qualified Accounts



If you're using traditional selling methods, you're likely spending *most* of your time doing outreach and follow-up (the left pyramid). Once you get a bite, then you qualify the account.

This is because most of this is automated. It's not time-intensive to spin up a new sequence in Outreach or Salesloft and run it against your list.

To avoid wasted effort, you will now start with qualified accounts on social. These accounts fit basic targeting criteria (industry, growth, location, etc.).


- Most of your time will be spent warming up qualified accounts.
- Then you'll construct a set of triggers that indicate you should speed up engagement with leads at those accounts. Those triggers include company-based events (like a new hire of a specific job title, funding round, change in leadership) and intent data triggers (like a profile view from an important lead).
- Then, where appropriate, you run direct outreach in the DMs to leads. As you can see in the right pyramid, this is the activity you will spend the least amount of time on.



Warming up accounts is a catch-all phrase for engaging with accounts on LinkedIn without ever pitching them. It includes commenting, DMs, creating content for them, etc.

Now that you have this context for how social campaigns work, let's dive in to preparing for your first campaign.

Next:

 **Module 8: Preparing for Your Outbound Campaign**



Module 8: Preparing for Your Outbound Campaign



We believe these fundamentals are good for any outbound campaign you're running. However, they're especially important on social because of the peer-to-peer focus! People will notice whether you know your stuff or not.

Spin up a Google doc or a Notion page. You probably have some of this information from your ramp time at your company, but it's good to assemble it all in one place.

1. Build Industry Context

TASK: What are the trends in your industry?

Successful social prospecting requires you to carry a conversation. If you're only trying to pitch, you'll fail. You need to be able to do two things:

1. Ask insightful questions
2. Offer useful resources

Insightful questions comes from a deeper understanding of what is currently happening in your industry. What will your prospects know? What are they reading? What are they aware of (or not aware of) that's going on in your industry?

Here are the main questions to answer:

- Who are the big names in your industry? The top-dog names who dominate the category (e.g. Salesforce, Mailchimp).
- What are some things that have changed in the industry over the past 2-3 years? What do buyers do today they didn't use to do? What don't they do anymore?
- What are the big shifts happening that give credibility to your product? Why does your product or solution matter to your buyers?
- What are some good "think pieces" on Medium, from top-dog company blogs, or resource libraries from your company or competitors, that talk about what's going on in your industry?

There are many more questions, but basically your goal is to build context about what's happening in the industry.

GUT CHECK: Could you carry a conversation at a party or a coffee house with a buyer about what's happening in your industry (without pitching)?

2. Understand Competitive Advantage

TASK: Why your company?

Who are your competitors? Why should a buyer choose your company over your competitors?

This can be a difficult question for some sellers if the company itself hasn't articulated it all that well. Many times, the competitive advantage comes out as features & benefits. Your software has a feature your competitors don't. Your product has a longer lifecycle

than your competitors. **Whatever.** Your buyers don't care that much about features until they're further in the buying cycle — unless it's truly a mind-blowing feature.

The real competitive advantage: **what's the problem you're uniquely built to solve?**

Chances are, your marketing team has/should have articulated this. You need clear differentiation from your competitors.

- ConvertKit is built for creators getting started with email marketing
- Chili Piper is built for easy scheduling and routing to handle inbound leads

In saturated or mature industries where there are a lot of companies offering something similar, the differentiation often comes back to the story you can tell about how you're the buyer's best friend to solve problem X.

GUT CHECK: Can you answer someone's question about how you're different from your main competitor?

3. Get to Know Your Audience

TASK: What does your ICP care about?

Most sales training hands you at least some preliminary information about your ICP. Their job titles or roles, their industry, the size of company, etc. etc.

Here are some ways you can get to know your audience:

- Interview your "internal ICP" (aka people at your company that match the personas you sell to)

- Look at your inbound leads and try to figure out why they are coming inbound. What patterns can you see?
- Read your G2 reviews — especially the bad ones! Look at the language they're using to describe your product on good and bad reviews.
- Review opportunity notes in the CRM for existing customers
- Listen to call recordings with high-quality prospects and existing customers
- Interview customers & prospects

One of our outbound plays actually uses *social listening* (searching for phrases and posts on social) as a way to develop this insight. It's okay if it's not 100% before you begin!

GUT CHECK: Can you articulate to a co-worker why you're targeting the ICP and what they actually care about?

4. Develop Your Value Proposition

TASK: What's your elevator pitch?


This is the final stage of prep. It should be pretty straightforward because you're just combining all the work up to this point.

You're going to use and reuse this in different settings. It should be a framework. It's a starting point to articulate "why them, why now, why you."

It's important to have this value proposition clearly written down somewhere as you'll be referencing it often.

| **GUT CHECK:** Can you articulate an elevator pitch for a customer?

Next:

 Module 9: Creating Account and Lead Lists



Module 9: Creating Account and Lead Lists



Required: Sales Navigator License. If you don't have Sales Navigator, contact [Morgan](#) for a free trial. It is not necessary to use to run any of the outbound campaigns, but it is an invaluable tool for organization, data, and intent triggers.

1. Separate Your Total Market into Narrow Account Lists

We've evaluated many sellers and sales teams using social. This is a fundamental truth:

- Poor performers only use 4 filters on average to construct their account list
- High performers use 8-12+ filters on average to construct their account list

Narrow account lists help you win.

TAM vs. Account Lists

We don't recommend saving your entire total addressable market (TAM) as an account list. Chances are, you are assigned a geography or an industry ICP. It's very tempting to construct a TAM account list, right? **Don't.** You need to be more specific in your targeting.

Think of it this way: **you're shooting for a goldilocks zone of qualification.** There are accounts in your TAM that are just too big to go after. There are also accounts that might be too small, growing too slow, downsizing, or don't have the right staff.

If TAM is the biggest universe of accounts you *could* sell to, you want to make sure your Account Lists inside Sales Navigator are much smaller. Instead, you need to qualify your TAM.

Qualifying Your TAM

<https://share.descript.com/view/ea23K2k8F0N>

Qualifying accounts in your TAM use standard filters:

- Headcount
- Industry
- Growth Metrics (% growth overall or % growth in a department)
- Adding or losing headcount
- Geography
- Job titles or job descriptions

These filters represent a subset of your total TAM that are **better targets** than just a standard company. The reason this upfront work is so important is... you can't just blast out LinkedIn DMs on an automated sequence! You'll burn your entire TAM. So you need to focus your efforts on a smaller subset of accounts who meet that qualification.

How do you know which filters are the right filters to use?

- **Win/loss analysis.** Look at the last 10 deals your company won, and the last 10 they lost. What do the deals that are closed-won share in common? The commonalities likely include headcount size, a certain decisionmaker title, a certain pain point. If you can't access CRM data, look at case studies on your website. What are the commonalities of those case studies?

- **ICP or persona knowledge.** From preparing for your outbound campaign, you likely have some deeper knowledge of your ICP or persona. This includes technographics, firmographics, and other data you used to qualify the account. You'll want to make sure your accounts have these characteristics.
- **Industry context or industry knowledge.** Is it better to sell into a growing company or a downsizing company for your product? Where is the pain more evident in your industry for the product you solve? What does your company believe is happening in the industry and presents the biggest opportunity? Again from preparing for your outbound campaign, you likely have some deeper knowledge about what's going on in your industry.

Sales Navigator offers you these filters to create account lists. Remember, you shouldn't just be filtering by a few of these. Try to filter by multiple different headcount sizes, revenue numbers, headcount growth, industries, etc.

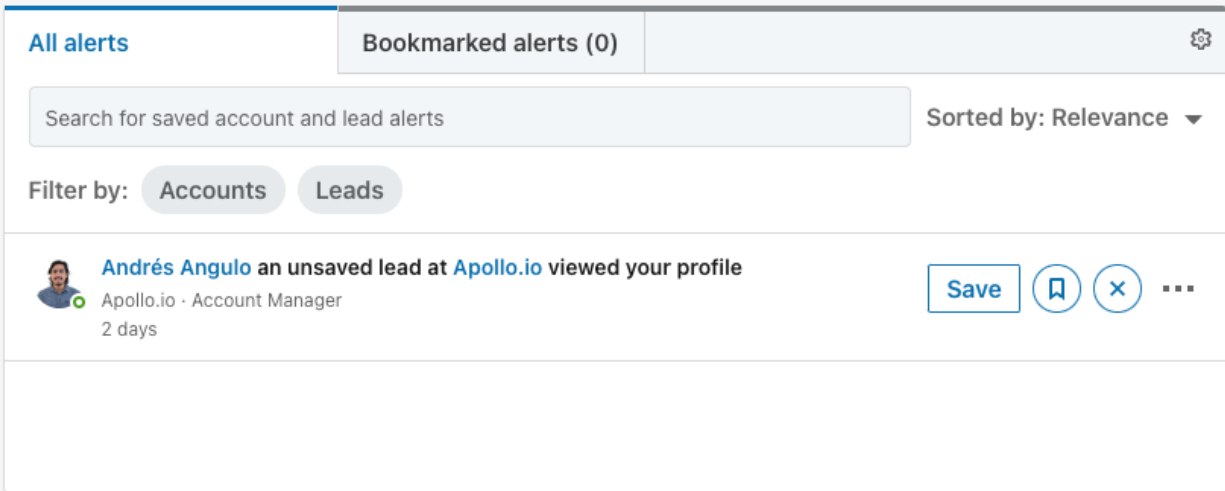
Company attributes		Spotlights	
Annual revenue	+	Job opportunities	+
Company headcount	+	Recent activities	+
Company headcount growth	+	Workflow	
Headquarters location	+	Companies in CRM	+
Industry	+	To enable filter, upgrade contract	
Number of followers	+	Saved accounts	+
Department headcount	+		
Department headcount growth	+		
Fortune	+		
Technologies used	+		

2. Create Prioritized Account Lists

<https://share.descript.com/view/kkdsAWb1rWz>

Now that you have your Qualified TAM Account List with all of your basic filters, it's time to prioritize the list and break it out into separate account lists.

First off - **why?** As stated in the above video, it's because Sales Navigator offers you native intent data. It looks like this:



Apollo.io is a company saved in one of our account lists. So we're now aware that the outbound campaign could be starting to gain traction inside this one account. Do you also see why your profile is so important?? Everything comes back to the credibility of your profile.

Prioritizing your Qualified TAM Account List allows you to identify which companies are the best match for your outreach first. By breaking out priority accounts, you can keep tabs on whether you're gaining traction within that account. It's also just... easier to keep track of, you know?

Creating Lists by Trigger

If you only had one big list, we would call this activity **prioritizing your list**. Which accounts do you reach out to first? Why them? Why now?

<https://share.descript.com/view/tWEgyQ5lkNx>

The central question you should be asking:

Why should I be reaching out to them today vs. 60 days from now?

The answer to those questions, as explained in the video, comes from becoming a detective and identifying the specific triggers that demonstrate **today is a good time for outreach!**

▼ Example Triggers (Table of Ideas)

Full credit to [Jesse Oulette](#) for this wonderful list. We could add a couple but honestly... this is a great starting point. Confused about how to use this? Watch the video above.

Expansion / Relocation	New job / position for a current contact
Increase / Decrease in Customer Base	Dissatisfaction with Current Vendor
Increase in Hiring Velocity	Positive / Negative Press Coverage
Creation of New Job Title	Increase in positive / negative employee reviews
Increase in Business Expenses	Increase in positive / negative reviews on G2
Competitor Launched a New Product	New website / major website changes
New Executive	Lawsuits
Merger/Acquisition	Website security issues / prospect website issues
Layoffs	Increase in demand for prospect's product
Change in Management Strategy/Restructuring	Selling Assets / cutting losses
Shift in Sales Channel (Inbound vs. Outbound)	Company facing piracy issues
Increase/Decrease in Marketing Budget	Creation of new job title
Entrance into New Markets	Bad quarter
Change in Marketing Channel	Good quarter
Funding Rounds	Increase in software expenses

Major Customer Announcement	Change in web traffic
New Product/Service Announcement	Q&A threads related to prospect questions
Major Industry Development	New technology trend
New Legislation	Event Announcements
Awards/Recognition	Change in Marketing Agency
Analyst Report	New Tool Adoption

Think of creating a few different account lists:

1. Urgent, hair on fire accounts that need my help ASAP
2. Accounts I need to warm-up because they're good targets but I'm unsure if the timing is right
3. Everyone else

You should create these as **separate** account lists inside Sales Navigator for easier use of the platform, but the principle is the same! So you'll end up having four account lists:

- Account List #1: Qualified TAM
- Account List #2: Urgent outreach based on symptoms
- Account List #3: Warm-up accounts
- Account List #4: Interesting accounts, but not urgent

As you continue to use the platform, you'll get more comfortable with moving accounts between lists and understanding how this organization will help you as you run more comprehensive outbound.

3. Explore Leads by Activity

We gotta be honest: **we don't like saving leads in Sales Navigator.** We'll outline the use cases in #4, but it's actually not all that useful if you're using our plays.

The problem is that Sales Navigator will notify you about everything that lead is up to, and not all of that data is useful.

[DT SCREENSHOT OF NOTIFICATIONS]

Plus, the notifications on content posting are usually delayed 18-24 hours after they actually post so if you're trying for early engagement, it's not all that useful.

Instead, we recommend using Lead Searches by account list.

Lead

Account

< Collapse

0 filters applied

Clear all

📌 Pin filters

Role

Function	+
Job title	+
Seniority level	+
Years in current company	+
Years in current position	+

Include "\$1-\$10M High Growth (50%+)" in Account lists filter

Groups

+

First Name

+

Last Name

+

Profile language

+

TeamLink connections of

+

School

+

Spotlights

Activities and shared experiences 📌	+
-------------------------------------	---

Posted Content

Keyword in articles	+
---------------------	---

Workflow

Lead lists 📌	+
People in CRM 📌	+
To enable filter, upgrade contract	
Account lists	—
<input type="text" value="Search for custom account lists"/>	
All account lists	
\$1-\$10M High Growth (50...	Include Exclude
1-15% Growth, 11-50, \$1M-...	Include Exclude
<\$2.5M 11-50 <100 Sales 5...	Include Exclude
Content Power Hour	Include Exclude
People you interacted with	+
Saved leads and accounts	+

On a lead search, you can include leads by account list.

See where we're going with this? 🤔

Then, add a **Spotlight filter of “Posted on linkedin in 30 days.”**

LeadAccount

< Collapse

1 filter appliedClear allPin filters

Past Company+	Industry +
Company type+	Years of experience +
Company headquarters+	Connections of+
	Groups+
	First Name+
	Last Name+
	Profile language+
	TeamLink connections of+
	School+

Role

Function+

Job title+

Seniority level+

Years in current company+

Years in current position+

Spotlights

Activities and shared experiences +

Changed jobs in last 90 days 7.5K+

Mentioned in news in last 30 days 36

Posted on linkedin in 30 days 13K+

Have shared experiences with you 99

Following your company 0

Workflow

Lead lists +

People in CRM +

To enable filter, upgrade contract

Account lists

\$1-\$10M High Growth (50%+) | X +

People you interacted with +

When you're using other lead filters by your ICP persona, you can whittle down to a fairly small number of leads that you can start engaging with based on their activity on LinkedIn (this will become important on our outbound plays).

▼ Example Lead Search for 71 Targeted ICPs, Active on LinkedIn

In this search, I've filtered leads by a Qualified TAM Account List. I've looked for leads inside Sales + Business Development who hold the displayed titles. And those who have posted on LinkedIn in the past 30 days. **Results? 71 leads.**

Role	Groups +
Function Sales X Business Development X +	First Name +
Job title "Director of Sales" X "Head of Sales" X "Vice President of Sales" X +	Last Name +
Seniority level +	Profile language +
Years in current company +	TeamLink connections of +
Years in current position +	School +
Spotlights	Workflow
Activities and shared experiences 🚩 Posted on linkedin in 30 days X +	Lead lists 🚩 +
	People in CRM 🚩 + To enable filter, upgrade contract
	Account lists <\$2.5M 11-50 <100 Sales 5% growth ... X +

This is why constructing prioritized lists, based on triggers, can help narrow down your field of vision even further.

These leads are actively posting, active on the platform. I can now run a variety of our outbound plays with these leads.

4. Create Lead Lists as Needed

Sometimes it is important to create lead lists. Remember – if your lead works at an account, you will get notified that they visited your profile whether or not you saved the lead, **as long as you saved the account.**

Saving leads has a few obvious benefits:

- Organize lead lists and conversation pathways
- Create lead lists of shared personas (all CFOs, all Directors of Sales, etc. across qualified TAM accounts) that allow streamlined follow-up and engagement
- Follow key leads with intent data triggers

We don't have strong advice about creating lead lists, as you'll see in the following modules. It only helps organize your information — it doesn't help you run outbound much more efficiently.



Enough prep, amiright? Let's dive into running outbound plays.

Next:



Module 10: Influencer Comment Play.



Module 10: Influencer Comment Play



This is the first play in the guide. Each play follows a simple formula. It has context and need-to-knows first and then a step-by-step process to follow after.

Before You Begin

The Influencer Comment Play leverages the comment section of influencers (who you should have identified in [Building Your Network](#)).

This play works best with the following types of accounts:

- Accounts who are actively posting and commenting
- Accounts who are actively commenting
- Accounts who are actively liking and/or following the influencer

This play has 3 results:

- Direct engagement with influencer who is posting
- Direct engagement with ICP accounts who are commenting
- Indirect exposure with ICP accounts who follow the influencer's content

The Play

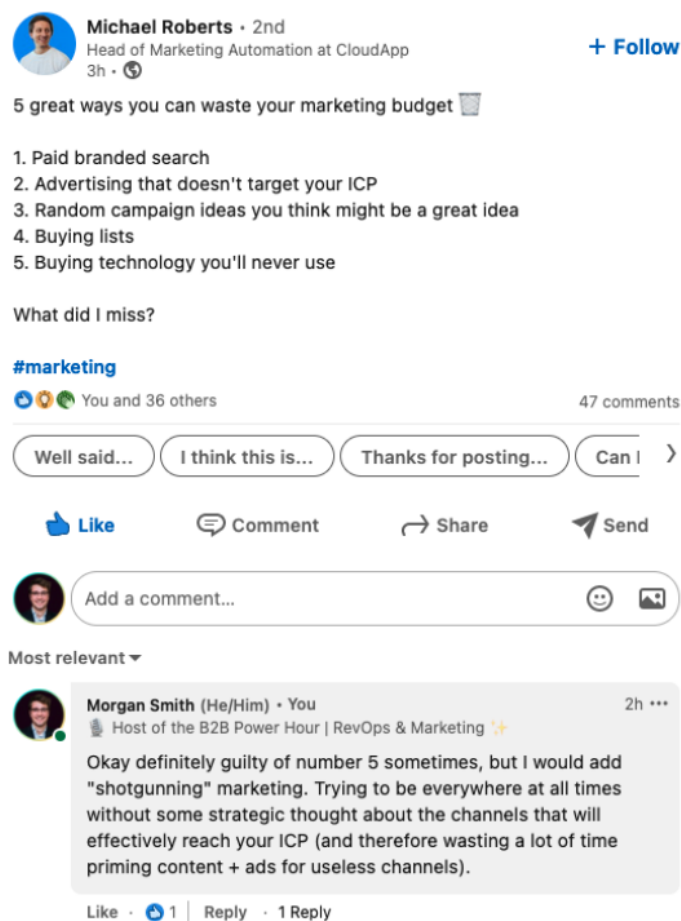
Step 1. Find the Influencer's Post

Either click the bell on the influencer, manually search the influencer's profile and find their activity, or find the post in-feed.

Step 2. Formulate a Comment.

Comments come in a few different flavors. Here are our favorite frameworks:

▼ The First-to-Insight Comment



Add your own point-of-view to the conversation. This means you use your insight to add value to the conversation.

In this example, Morgan is using his insight about marketing to add his point-of-view to the post.

Also, the comment is conversational and looks to extend a conversation into the replies.

You can either do a "Yes and..." to continue the conversation as Morgan does.

Or, you can do a "Yes and..." that disagrees with the original post to get the conversation going.

▼ The Curiosity Comment

Ask a question. What's something you're

genuinely curious about after reading the post?

(This is not that place for a “shadow pitch” either, don’t ask a leading question that allows you to pitch your service further down the line)

You want to spark genuine conversation and people love being able to offer their own insights.

Hot tip: make sure to tag the poster in your comment by naming them. Instead of just asking the question, you could lead into it with “Hey [@name], this is great. But, I was wondering....”

Here Nicholas is extending the conversation with a question response.



Andrey Lukashenkov • 1st
International Business Development and Growth | Open for New O...
[nicholas thickett](#) any measure that becomes a metric tends to be gamed and corrupted.
...see more

Like · ❤️ 1 | Reply · 1 Reply



nicholas thickett (He/Him) **Author** 3d ·
Engagement in public earns conversations in private -> tha...
Lol well said [Andrey Lukashenkov](#). You have to look at the full picture and not just one number. That's what I was saying in my comment about building momentum.

Qualified Pipeline + Opportunity/ close ratio

If the pipeline increases but close rate drops...

Did you actually capture any of that lift and realize an ROI?

▼ The Joke Comment



Morgan Smith (He/Him) • You 2h ...
👤 Host of the B2B Power Hour | RevOps & Marketing ✨
Wait... my "Try-hard Tammy" persona isn't going to make my marketing work???

On another note -- this whole list is gold. I especially love number 8, it speaks to a mindset shift around content creation and what it means to interact with your buyers.

Like · ❤️ 1 | Reply · 2 Replies

This is a little harder to nail, especially because humor can be lost in writing, but it’s a way to say “thanks for this post!” without actually saying it. Here, Morgan is simply affirming the content of the post (a list about ways content fails) with a little humor about a brand persona.

Proof in the pudding – this comment earned a reaction + a reply + a post edit to include the “try-hard tammy” in the original post all by the post author, and an inbound connection request from the post author.

▼ The Tag-Team Comment

The hope is that you’re not doing this alone! Or, you find trusted peers who are also using this strategy. This is not something to abuse because people don’t like being tagged all the time.

We recommended sticking with one or two accounts maximum on a tag inside the comment. The tag should be relevant (related to a recent conversation you’ve had) or provoking a question (you’re tagging in the person with a question).

Definitely don’t abuse this. People’s notifications are precious.

If you want to engage directly with the influencer’s post, post a comment!

Step 3. Extend the conversation on other comment.

Scroll through the comments that already exist and identify ICP accounts who have commented. Use the above comment frameworks to again formulate comments to extend the conversations in the comments.

▼ Things to Avoid

- **Bloated language.** No one wants to read an essay or figure out what you’re actually trying to say. Keep it succinct, clear, and conversational.
- **Linking in your company.** Again, this is not the place to pitch your company. Keep the comment value-focused, not focused on how your company solves the problem they may be experiencing. You can pitch on a call, not in the comments.
- **Simply saying “thanks!”** That’s not a valuable addition to the conversation. The point of commenting is to drive interest in your profile and “thanks” will get

lost in the noise.

You can also comment on other's posts (people who bring a good comment to the table) just to keep the conversation going! You never know who knows who in the industry.

Step 4. Repeat 5 times.

Chances are there are a few different influencers that are good targets for this strategy. Repeat this strategy 5 times (or more, if you want! 😊) to keep a variety of conversations moving.

You can repeat this on one influencer's profile if you'd like — but we would recommend cycling through other's to spread around the engagement.

Step 5. The Rule of 3.

When commenting, the goal is to eventually send a connection request. But what's the right time?

Send a connection request after three back-and-forth comments between you and the ICP profile.

This means 3 responses *from them*. It's not one comment from them, one comment from you, and a reply from them. It's 3 back-and-forth comments: a real conversation in the comments!

- Send the connection request without any personalization. Keep it blank. They know who you are.
- Keep the conversation in the comments going! You don't need to immediately transition to the DMs.
- Our tip is if the conversation is turning to proprietary information or more confidential things about the business, head to the DMs. Otherwise, keep the comments flowing!

Remember: Zoë Hartsfield always says "**the conversations in private are earned by engagement in public.**" The DMs are great, but comments allow others to see your efforts as well. And if you're listening into the right conversations, your ICP will see those conversations.

If you don't get to the Rule of 3 on one conversation, don't send the connection request. Just keep on chatting. If they don't respond, don't push it. Just keep the conversations flowing, naturally.



No pitching! Vampire Sales only!

Measuring Success

This play is successful when:

- You have meaningful conversations with ICP in the comments
- You earn an increase in profile visits
- You earn connection requests *from* ICP accounts
- Your connection requests to ICP accounts are successful

If you aren't getting up to the Rule of 3, work on formulating more insightful comments or ask different questions. Throw in GIFs, add your perspective, tell jokes — make it fun! It's social after all. We're **supposed** to have fun!

Next:

 Module 11: Social Listening Comment Play.



Module 11: Social Listening Comment Play

Before You Begin

The Social Listening Comment Play uses LinkedIn's search feature to find ongoing conversations. It will work very similarly to the Influencer Comment Play.

This play works best with the following types of accounts:

- Accounts who are actively posting content
- Accounts who are actively commenting

This play has 2 results:

- Direct engagement with account who is posting
- Direct engagement with ICP accounts who are commenting

The Play

Step 1. Find the Post

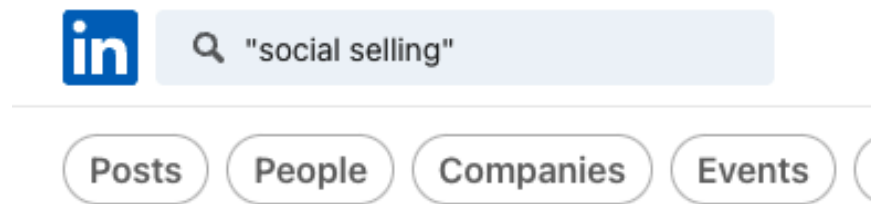
Use conversational phrases and words.

If people aren't posting the phrase "EMEA social selling" in their posts, searching for that term won't yield anything useful. But if people are using the phrase "LinkedIn in Croatia" in their posts, you'll find more useful things.

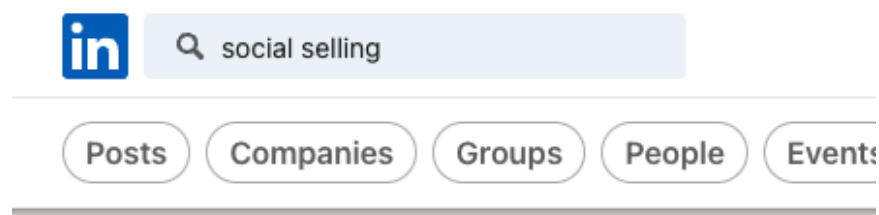
For example, we search for "can't book meetings" because a lot of sellers post content about not being able to book meetings. It's a casual use of the phrase. In contrast, people rarely post "phone disconnects" — even though they point to the same topic.

Alternate between Boolean Queries and inclusive queries.

Boolean queries or "hard searches" force the search to use the entire search keyword.



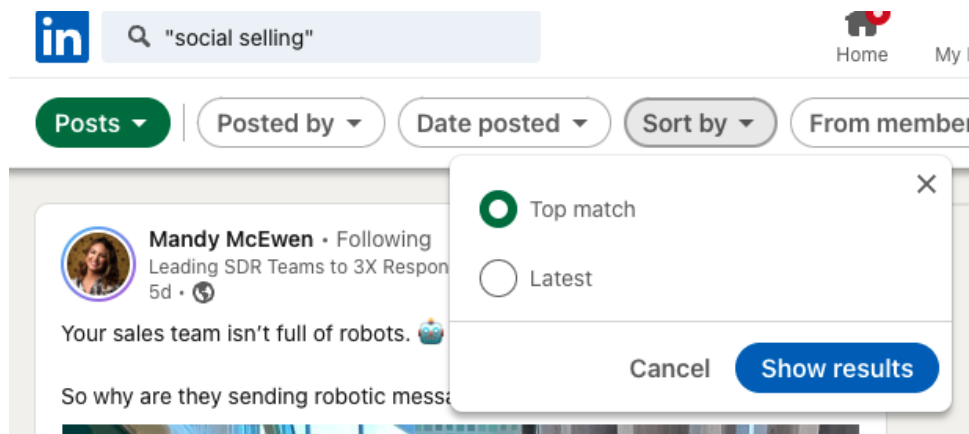
This is a Boolean query. It only searches for the exact match phrase of "social selling."



This search is **not** a Boolean query. It is an inclusive query. It will find posts who use *either* "social" or "selling" or "social selling" in their post. It is very broad and finds a lot of different key terms.

Use the boolean queries to find the conversations already happening by finding exact match of the casual phrases.

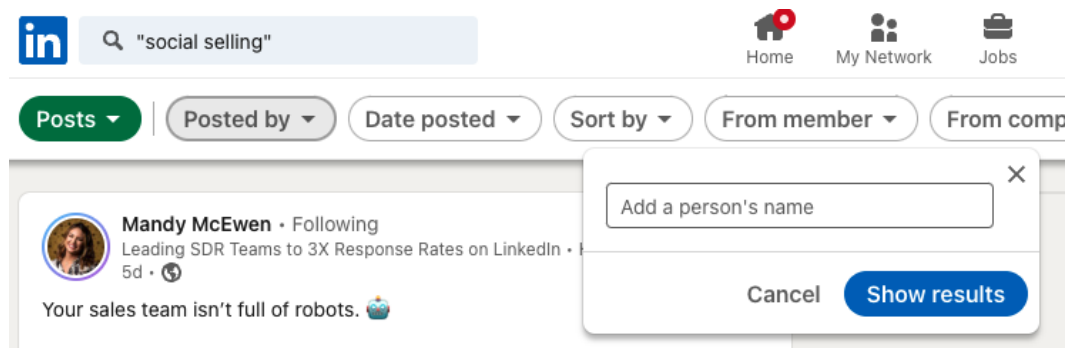
Sort by Latest and Filter by Author/Industry



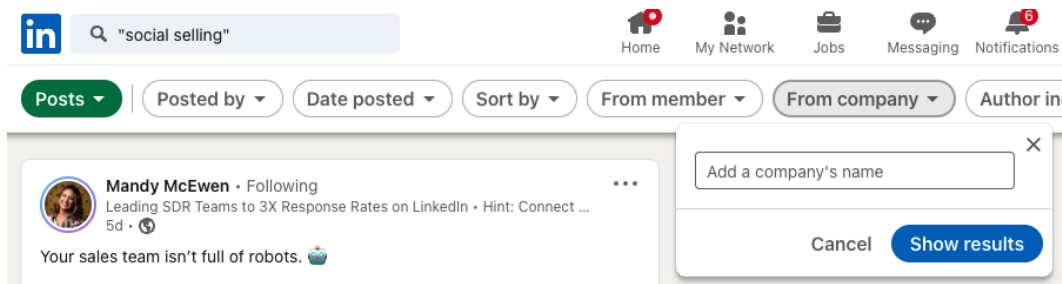
If you select posts, you can Sort by "Top match" or "Latest."

- **Top match.** These are top match posts starting with people in your network based on LinkedIn's own algorithm for engagement and relevance.
- **Latest.** This is just the latest post from any account using the term searched. This allows you to step out of your immediate network and find new conversations.

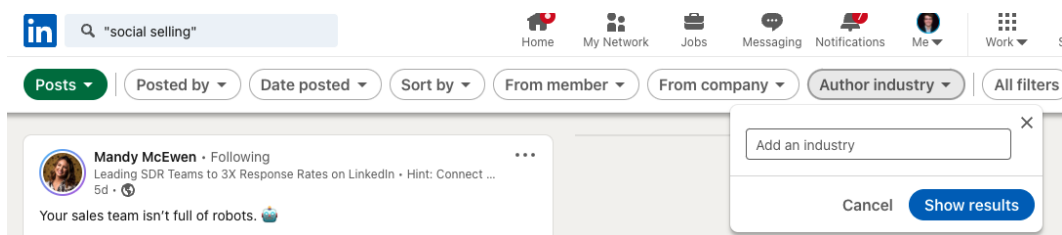
You can also find posts matching this keyword from a specific author...



...from a specific company...



....or filter by industry.



Use any or all of these filters to your advantage!

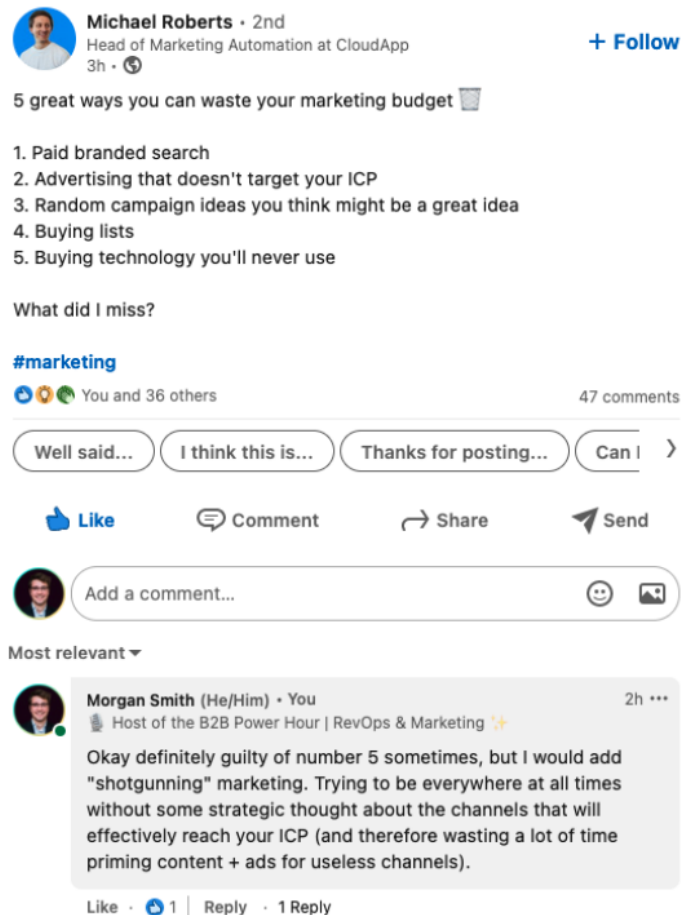
- You could search for posts from a specific ICP profile who you know is active from your Sales Navigator searches, or broaden out your play.
- You could search for specific phrases inside an industry that you know will find good conversations.
- You can search for specific posts inside an account if you're trying to route in multiple ways with active accounts.

Step 2. Formulate a Comment.

Comments come in a few different flavors. Here are our favorite frameworks:

▼ The First-to-Insight Comment

Add your own point-of-view to the conversation. This means you use your insight to add value to the conversation.



In this example, Morgan is using his insight about marketing to add his point-of-view to the post.

Also, the comment is conversational and looks to extend a conversation into the replies.

You can either do a "Yes and..." to continue the conversation as Morgan does.

Or, you can do a "Yes and..." that disagrees with the original post to get the conversation going.

▼ The Curiosity Comment

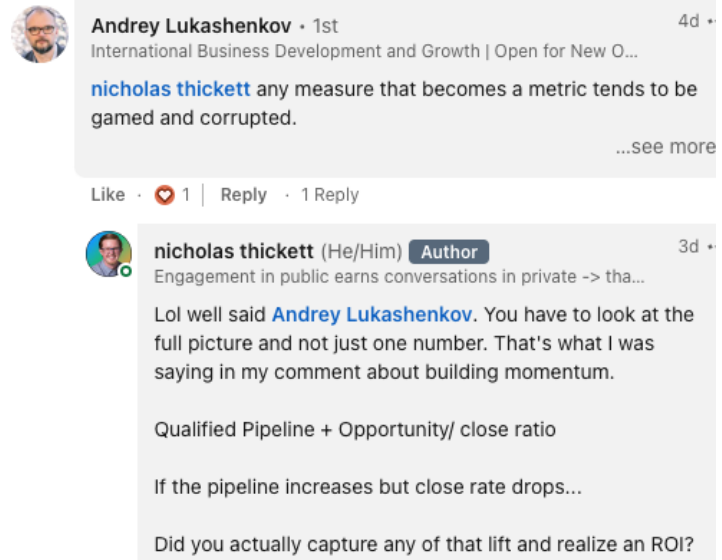
Ask a question. What's something you're genuinely curious about after reading the post?

(This is not that place for a "shadow pitch" either, don't ask a leading question that allows you to pitch your service further down the line)

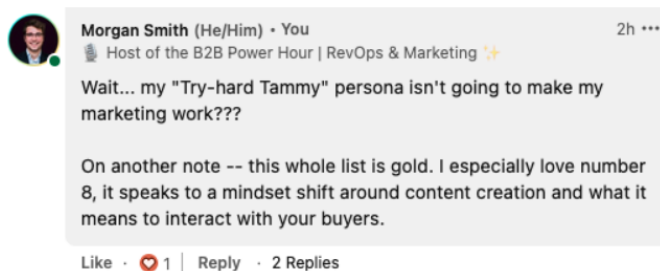
You want to spark genuine conversation and people love being able to offer their own insights.

Hot tip: make sure to tag the poster in your comment by naming them. Instead of just asking the question, you could lead into it with “Hey [@name], this is great. But, I was wondering....”

Here Nicholas is extending the conversation with a question reponse.



▼ The Joke Comment



This is a little harder to nail, especially because humor can be lost in writing, but it's a way to say “thanks for this post!” without actually saying it. Here, Morgan is simply affirming the content of the post (a list about ways content fails) with a little humor about a brand persona.

Proof in the pudding – this comment earned a reaction + a reply + a post edit to include the “try-hard tammy” in the original post all by the post author, and an inbound connection request from the post author.

▼ The Tag-Team Comment

The hope is that you're not doing this alone! Or, you find trusted peers who are also using this strategy. This is not something to abuse because people don't like being tagged all the time.

We recommended sticking with **one or two accounts maximum** on a tag inside the comment. The tag should be relevant (related to a recent conversation you've had) or provoking a question (you're tagging in the person with a question).

Definitely don't abuse this. People's notifications are precious.

Since you're engaging directly from search, you should drop a comment specifically on the post.

Step 3. Extend the conversation on an ICP's comment.

Scroll through the comments that already exist see if there are any ICP accounts who have commented. Use the above comment frameworks to again formulate comments to extend the conversations in the comments if it's worthwhile.

▼ Things to Avoid

- **Bloated language.** No one wants to read an essay or figure out what you're actually trying to say. Keep it succinct, clear, and conversational.
- **Linking in your company.** Again, this is not the place to pitch your company. Keep the comment value-focused, not focused on how your company solves the problem they may be experiencing. You can pitch on a call, not in the comments.
- **Simply saying "thanks!"** That's not a valuable addition to the conversation. The point of commenting is to drive interest in your profile and "thanks" will get lost in the noise.

Step 4. Repeat 5 times.

Chances are there are a few different searches that can be useful. Repeat this strategy 5 times (or more, if you want! 😊) to keep a variety of conversations moving.

Step 5. The Rule of 3.

When commenting, the goal is to eventually send a connection request. But what's the right time?

Send a connection request after three back-and-forth comments between you and the ICP profile.

This means 3 responses *from them*. It's not one comment from them, one comment from you, and a reply from them. It's 3 back-and-forth comments: a real conversation in the comments!

- Send the connection request without any personalization. Keep it blank. They know who you are.
- Keep the conversation in the comments going! You don't need to immediately transition to the DMs.
- Our tip is if the conversation is turning to proprietary information or more confidential things about the business, head to the DMs. Otherwise, keep the comments flowing!

Remember: Zoë Hartsfield always says "**the conversations in private are earned by engagement in public.**" The DMs are great, but comments allow others to see your efforts as well. And if you're listening into the right conversations, your ICP will see those conversations.

If you don't get to the Rule of 3 on one conversation, don't send the connection request. Just keep on chatting. If they don't respond, don't push it. Just keep the conversations flowing, naturally.



No pitching! Vampire Sales only!


Measuring Success

This play is successful when:

- You have meaningful conversations with ICP
- You earn an increase in profile visits
- You earn connection requests *from* ICP accounts
- Your connection requests to ICP accounts are successful

If you aren't getting up to the Rule of 3, work on formulating more insightful comments or ask different questions. Throw in GIFs, add your perspective, tell jokes — make it fun! It's social after all. We're **supposed** to have fun!

Next:

 Module 12: Account Dogpile Play.



Module 12: Account Dogpile Play

Before You Begin

The Account Dogpile Play works extremely well with an account with multiple personas who are active on LinkedIn. This play is job-title agnostic: you're trying to make a name for yourself inside the company through all available avenues.

This play works best with the following types of accounts:

- Accounts who have multiple active profiles out on LinkedIn across different seniority levels and functions

This play has 1 key results:

- Everyone inside the account will be talking about you

Inspired by Evan Patterson

<https://share.descript.com/view/XGVlInIABfB>

"I don't care if you're the janitor or if you're the VP of Sales. I am going to make friends of everyone inside and out because I find that I would rather book 40, 50, 60 intro meetings at the same company with non-decision makers and build a fan base in a company. So therefore they can go to their boss 60 different times saying we need this problem solved."

- Evan Patterson

The Play

Step 1. Segment the Account

At every account, there will be three tiers of leads. Ignore job titles, only focus on the account in its entirety.

1. Active leads who are posting content (Tier 1)
2. Active leads who are not posting content but commenting and liking (Tier 2)
3. Lurker leads who are not posting content or commenting (Tier 3)

Even if you sell to HR, the goal of the Account Dogpile is to use every single avenue available to route into the account. That means Tier 1 leads (active leads who are posting content) could be Directors of Sales or Product Managers. You're totally ignoring job titles.

Step 2. Prepare for engagement.

Since there are multiple, active profiles at this account:


- Open up separate tabs of Tier 1 accounts who have posted content today
- Open up separate tabs of Tier 1 / Tier 2 accounts who have commented today (but not posted)

Yes, this is manual work. But remember, you're just dogpiling on all at once, so it's best to get these accounts all lined up! It's possible you'll have 10-30 tabs open at once depending upon the size of the account.

Step 3. Rapid Fire Tier 1 & 2 engagement.

Now, run the comment strategies previously detailed in the Influencer Comment Play or Social Listening Comment Play. Get some conversations going! Just go from one profile

to the next.

 *Try not to start multiple conversations with one lead in multiple places. The goal is to get multiple different leads to talk with you, not overwhelm a singular lead with engagement.*



Pro Tip: You can assemble all of the Tier 1 and 2 profiles inside a Sales Navigator Lead List for easy organization.

Step 4. Connect with Tier 3s.

As detailed in the next module Connection Strategies, it's important to still reach lurker accounts. Use the blank connection option or a personalized connection option if it makes sense, depending upon the conversation.

Step 5. Repeat over 30 days.

Continue repeating this play over a month as each Tier 1 and Tier 2 continues to post content and comment on influencer's posts. You will definitely get known within the account, quickly!


Measuring Success

This play is successful when:

- You earn connection requests *from* across the account
- You earn connection requests *from* ICP leads
- You have meaningful conversations with ICP leads
- You build a name for yourself within the account

If you aren't getting up to the Rule of 3 with Tier 1 or Tier 2 accounts, work on formulating more insightful comments or ask different questions. Throw in GIFs, add your perspective, tell jokes — make it fun! It's social after all. We're supposed to have fun!

Next:

 Module 13: Connection Strategies



Module 13: Connection Strategies



LinkedIn allows you to connect with up to 100 people per week. We recommend not maxing out that limit, as automation tools tend to max out this limit and get profiles marked as “spammy,” which you don’t want. We recommend connecting during Monday to Friday, so 20 connections per day.

1. Why You Shouldn’t (Usually) Lead with Connection Requests

So... you might very reasonably asking: **wait, why haven’t we talked about this sooner?!** It’s a great question. If you’ve done your homework and completed all the previous modules instead of just skipping this section, maybe you have a sense why connecting with accounts isn’t all that important.

You can accomplish each of the previous plays without leading with connection requests.

- You don’t need to be connected with someone to kickstart a conversation in the comments.
- You don’t need to be connected with an influencer to find their content.
- You don’t need connection requests to find conversations from interesting people, get people talking about you with good comments, or even dogpile an account

There's one specific kind of connection request that doesn't rely on warm-up strategies. That's up next module! But generally we recommend leading with engagement instead of connection requests. Connection requests are higher stakes: people can ignore you, they can mark you as spam, or they can block you entirely. Why take the risk unless you're very confident in its acceptance rate?

2. Combo Plays for Connection Requests

Remember the Vampire Sales Rule?



You are not allowed to pitch unless you are invited to.

Keep that one in mind in all of these 😊 Just because they accept your connection request doesn't mean it's time to pitch.

Use connection requests in a combo play with another one of our plays:

Combine Influencer or Social Listening Comment Play w/ Connection Request

Here you're going to combine either of the comment plays by obeying The Rule of 3:

Send a connection request after three back-and-forth comments between you and the ICP profile.

Combine Account Dogpile w/ Connection Request

Here you're going to combine the Account Dogpile strategy with connection requests at different tiers of the dogpile.

Combine Blank Connection Request w/ Content Strategies

We're going to cover the Content Strategies piece in our section on inbound, but suffice it to say – you can combine blank connection requests and then nurture them via content.

3. Options for Connection Requests

But what should you write — if anything — in the connection request?

▼ Extend the Conversation from the Comments

This is our recommended option for most of your connections. After you have 3 back-and-forth conversations, send a personalized connection request. Continue the conversation in the DMs by adding a personalized note that continues the conversation. The goal is to generate good discussion in the DMs.



"Hey [name], loved our convo so far. What do you think about...?"



"Hey [name], honestly I was thinking about [X] when you said..."

▼ Send a Personalized Connect Request with Context

This is where you conduct personalized research in advance of sending a connection request. Find a news article, a recent post on LinkedIn, a podcast they were a guest on, etc. Include that in the connection request. The goal is to **generate a conversation**. Never just settle for a passive connect request.

Or – if combo'ing with the Account Dogpile play – use this as a way to route inside the account by adding context or names as credibility builders.



"Hey [name], just listened to your interview on B2B Power Hour. You were discussing [X] and I wanted to ask..."



"[Name], just read your excellent guest post on Infusionsoft's blog. Quick question: did you consider..."



"Was just talking with [name], and she said I should definitely connect with you too. We were chatting about [X] and it seems like that's definitely up your alley?"



"Okay so... [Name] said I should connect with you because I was chatting with him about [X] and he said that it's your jam?"

There are almost infinite variations here, but the goal is to keep it casual and credible. If you make it too professional, the mental spam filters of most buyers will block out the noise and they will decline your connection request.

▼ Send a Blank Connection Request to 2nd Degree Connections

This is where you send a connection request with no personalization note to a 2nd degree connection. It can work, especially when you're starting to expand your network into new areas on LinkedIn (remember Module 5?). With the right headline and profile, it's likely you can see 50%+ connection acceptance rates. However, you will likely have lower follow-up engagement. This is why we combo this with content and driving inbound.

The 2nd blank connection requests can also work well as referenced in the Account Dogpile play.

But there's one more specific kind of connection request that doesn't rely on warm-up strategies. That's up next! 😊

4. Withdraw Connections After 3 Weeks

Based on our benchmark data, 100% of the connection requests sent following the Rule of 3 with any of the comment plays should be accepted. But if you're sending blank connection requests, chances are some people are going to outright ignore the request.

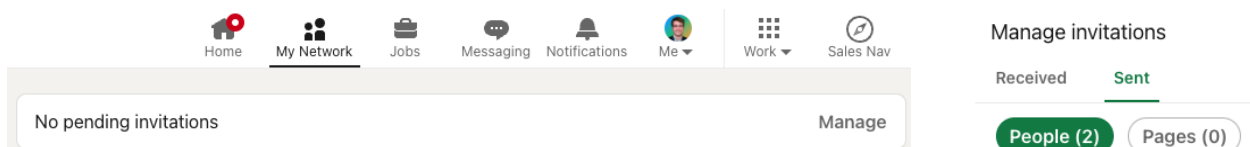
Automation software is a main culprit here: the software automates a certain number of connection requests, follow-up messages (usually pitches, not thank you notes), and

profile views. LinkedIn has cracked down *hard* on these practices in order to win back the trust of users. We all hate the spammy connection requests, right?

One of the ways to keep on the good side of LinkedIn is to withdraw connection requests after 21 days.

- In our experience, >75% of connection requests that are accepted will happen within the first 24 hours.
- The next 20% happens within the next 7 days.
- The last 5% happen within 2 weeks.
- We've only had one or two connection requests (out of thousands) accepted after 20 days.
- Withdrawing connection requests makes you look like a real human, because you're not stacking connection requests & endlessly spamming people. You're being more considerate!

You can access this by clicking “My Network” and then selecting “Manage” in the top right. Scroll down to the bottom of the list and start withdrawing any names that are 3 weeks or older.



Next:

 [Module 14: Spears & DM Plays](#)



Module 14: Spears & DM Plays



This module is dedicated to generating and sustaining conversations. We begin with the Spear Connection Request, a highly specific form of outreach. The rest of the module outlines different DM plays.

1. The Spear Connection Request

This is the one exception to the Vampire Sales Rule and it is for a very specific set of circumstances.

As originally articulated by Justin Michael, the spear is a carefully crafted piece of outreach.

- 3ish sentences with a CTA
- Succinct, ugly, and compact

Here's an example template Spear from JM himself:

*Hey {firstname} - curious if you're open to chat re:[**business function**] strategy? [**Similar customer**] was able to [**quantifiable outcome**], saw a reduction in [**pain point**] and [**positive outcome**] using [**process**]. If it makes sense Q4, should we set up a call?
Thanks - {initials}*

The way this could actually look:

Hey Morgan - curious if you're open to chat re:sales strategy? Alignd was able to lift pipeline by 31% in 60 days, reduced their sales cycles by 22% and generated 30+ booking meetings off of LinkedIn using our social prospecting method. If it makes sense Q4, should we setup a call? Thanks - NT

At a **strategic level**, the spear is formulated to prompt an immediate response. Think back to creating your Account and Lead Lists. The spear will likely be relevant to 1-3% of your total list. They are a high priority target based on a particular trigger. Instead of going through the warm up motions, a well-crafted spear can cut through the noise and prompt an immediate conversation.

At a **tactical level**, the spear is formulated in a way that grabs their attention. Instead of some BS connect request with a follow-on pitch, or even waiting for content to generate inbound leads, this is a request that is highly specific and prompts immediate action.

This is very similar to a tight, well-crafted cold email on outbound. The only difference is – **you've got one chance. Don't blow it.** There are no follow-ups, sequences, or bumps you can send to a connection request.

▼ **Alt. Spear Framework: Observation + Insight + Question**

The original formula is a great starting point but not the *only* way to do it. Will Allred's popular email framework uses "Observation + Insight + Question" as a way to kickstart the conversation.

Hey Morgan – noticed you're hiring for 2 SDRs. Companies your size struggle to ramp them quickly, preventing them from being 100% effective in their first quarter. If we could help you get results in their first quarter, would that be worth a chat?

Or in a template format:

| *Hey {firstname} - [Observation]. [Insight]. [Question CTA]?*

Like any cold outbound campaign, this is an artform and something worth testing out. These are simply examples.

The reason we invested so much time with Preparing for Your Outbound Campaign is because all of that knowledge informs the way you're articulating your outreach. Your Account and Lead Lists being correctly prioritized also helps with this.

We recommend the following:

- Write 3-5 different spears / cold outreach requests
- Start with 1 option and send to MAX 5 highly-qualified leads. If it doesn't get accepted, time to move on to the next option! If it does get accepted but doesn't generate a response, work on the specificity of your messaging.
- Don't send more than one spear campaign per week. Keep most of your outbound campaign focused on everything else outlined previously.

2. The Curiosity Opener DM

Okay, okay. Enough with the spears.

How do you open up a conversation with someone you've recently connected with on a blank connection request? Or, how do you restart a conversation with a lead you *thought* was really good but it sort of fizzled out?

Our preferred one is a curiosity opener. Josh Braun called it "poke the bear."

For an outbound campaign we ran for a company in energy efficiency, this is what the curiosity opener sounded like:

| *Hey Morgan, over the past year energy prices have doubled in our province and I was curious — how are you managing that cost?*

Another example could be:

Hey Nick, over the past 3 months I saw there's been serious churn in your sales team. How's the onboarding for the new hires going?

A general template looks like:

Hey {firstname}, [observation]. [Unsettling question]?

This format doesn't work as well in a Connection Request because it hits most buyer's mental spam filters. It implies you have something to sell (which is true) and is better accommodated as a DM with someone you've already connected with.

It's also better in the DMs vs. in the comments because it potentially reveals sensitive information.

3. The Profile Visitor DM

Now onto profile visitors. There are a number of possible triggers for this DM:

1. Someone viewed your profile who you've been already engaging with in comments or content
2. Someone viewed your profile who is an unsaved lead at a target account (trigger in Sales Navigator you automatically set-up when saving Account Lists)

For this play, we're combining the idea of a connection request & a DM as it's possible some people will be 2nd or 3rd degree connections who view your profile. Just consider your connection request in this play your 1st DM.

<https://share.descript.com/view/IJVedK0ZTGK>

The start of the outreach will be context based.

▼ Starting from Search

As Nick says in the video, if you notice that they found you from search — bring it up in the DM and/or connection request!

Hey Nick – saw you stopped by my profile from search. Were you looking for anything in particular?

Or another option:

Hey Morgan – saw you stopped by my profile. I know we've been connected for a while, but you found me in search. What were you looking for?

▼ Starting from Conversations

If you've been having ongoing conversations with someone in the comments and see they visited your profile, use that to your advantage. This is only for accounts who you've already connected with.

You're not calling out their profile visit, instead using it as an intent trigger to prompt more conversation.

Hey... I kept thinking about that thread we had so I went looking for additional resources. Have you seen this article?

Okay so after our conversation last week I went asking around and found out...

Did you see this post? It reminds me of that convo we had last week. Thoughts?

There's so many infinite variations on this, but you're just tying together the conversations you've had with additional resources or insights.

▼ Starting from Sales Nav Trigger

There's three different options here.

1. Send a connection request that says:

Hey {firstname} - saw you stopped by my profile. Looking for anything in particular?

This is a bold one and gets rejected about 50/50. Depends on the lead — this one usually works better with lower seniority accounts (SDRs, Managers, or Specialists who have free time on their hand). Higher seniority accounts (CXOs, Directors) are prone to ignore this.

2. Run an outbound play that generates an inbound connection request.

This works best with active accounts (view their profile and see if they comment or like things). If they are active, use one of the outbound plays to warm them up and get to that Rule of 3!

3. Send a blank connection request.

This works best for “lurker” accounts — the accounts who don't post or comment, but view people's profiles. They probably will ignore anything too personalized, so it's best to send them a blank request.

4. Running Discovery in the DMs

You don't need to wait for a meeting to do discovery. Why not do it in the DMs? Here's the thing, though. You have to make it a casual conversation. You **cannot** make it a robotic discovery conversation.

Rules of Engagement

1. **Coffee House Rules.** Keep it casual. If it's not something you would say in person over a cup of coffee, don't say it. LinkedIn is a professional network, but make sure your personality is infused in the DMs.
2. **Obey Vampire Sales!** If you're not asked to pitch, don't. Keep the conversation going and ask deeper questions to understand more of what they're experiencing.
3. **Offer value without hesitation.** If the conversation reminds you of a good article, share it! If the topic at hand references something your company's marketing blog has, send it along. Keep the conversation going and balance asking questions with offering insight.

Goal of Discovery in the DMs



Book a meeting. Simple as that!

Chances are this meeting will probably be much better than your average discovery call because the buyer is already interested in what you have to offer!

▼ Example Discovery

Let's look at an example. Someone reached out to Morgan asking about this guide. (Certainly not a high \$\$ offer, but it's a good example).



Your Seller's Guide to LinkedIn Prospecting looks interesting. I've bought several other LinkedIn courses and this is on my list - what makes it different?



Morgan Smith (He/Him) • 3:27 PM

Hi [redacted]

What other courses have you bought? And what did you like about them?



Hey Morgan!

Did Justin Welsh's, Alex Sheridan's, and Thibaut Souryis'.

Justin's was the earlier version and IMHO it was a bunch of stuff I already knew.

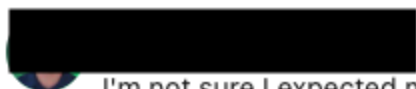
Alex Sheridan's also felt like it fell flat from what it promised. Not super actionable.

Thibaut's course was good, but felt like there were some gaps on really developing messaging to replicate his results. I liked that it introduced a new way of doing things.



Morgan Smith (He/Him) • 3:40 PM

Not sure I'm familiar with Alex's course. What did you imagine Thibaut would provide that would help close that gap?



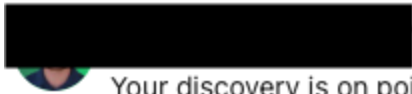
I'm not sure I expected much, I probably just didn't take the time to really craft relevant enough messaging. At the time I was also coming into a new role with an ICP I didn't understand that deeply, so that was limiting for sure as well



Morgan Smith (He/Him) • 3:41 PM

Mmm yeah that can be tough.

Okay but like... let's stop the course chatter for a moment.
What do you feel is missing from your LinkedIn game right now?

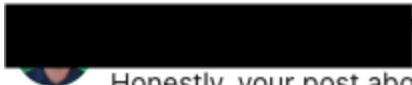


Your discovery is on point.



Morgan Smith (He/Him) • 3:47 PM

🤔 i love selling to salespeople.



Honestly, your post about getting meetings booked each week got my attention.

So more meetings booked is what's biggest for me. And yeah, selling to salespeople is the easiest, right?



Morgan Smith (He/Him) • 3:48 PM

yeah. are you measured on the success of LinkedIn as a channel? like compared to email or phone



and Morgan continued on the conversation.

The questions Morgan is asking are casual (even if he called him out on discovery!). We're focusing in on the problems he's experiencing and how we can help, and whether we're the right fit.

These kinds of questions:

- **Confirm to us he's the right fit.** Sometimes prospects aren't the right fit and we shouldn't qualify them.
- **Build interest in what we have to offer.** Because Morgan isn't trying to sell him on anything and is taking a genuine interest, he's building trust and rapport. That creates psychological interest in what we have to offer.
- **Creating pressure toward a meeting or a purchase.** The further along this conversation goes, and the deeper questions we ask, the higher likelihood of him asking us for a meeting to discuss more or just directly purchase the guide (in this case).

Next:

 Module 15: Social Prospecting Cheat Sheet



Module 15: Social Prospecting Cheat Sheet



This is a summary of outbound prospecting on social. Use this as a quick reference guide to run your prospecting!

1. Why Them? Why Now?

Build your target account lists and lead lists by:

- Creating a “Qualified TAM” account list that meets base-level qualification metrics like headcount, growth, location, industry, etc.
- Prioritizing the account list using triggers that answer “why should I reach out to them now vs. 60 days from now?” These triggers are related to an unforeseen problem or opportunity that you can see, but your prospect can’t.
- Adding more niche account lists based on your prioritization

2. Who’s Active?

Find and prioritize active leads at each of your accounts.

- First use Sales Navigator filters to find those actively sharing and posting content. Create a lead list if desired.
- Then over time, find other leads at the account who are actively commenting or liking content. Create a lead list if desired.

3. Warm Up Accounts in the Comments

Use social listening to find posts talking about relevant topics. Find influencers who post content that attract your ICP.


- Comment on the original post, especially if it's from an active ICP
- Respond to comments from active ICP leads who have already dropped a comment – continue the conversation!
- Fulfill the Rule of 3: have 3 back-and-forth conversations before sending a connection request

4. Build Curiosity in Connection Requests & DMs

Depending upon level of intent, different circumstances call for different actions.

- Send blank connection requests to build your network with 2nd degree connections
- Send personalized connection requests to continue the conversation from the comments or an event
- Send spears or highly personalized cold outreach to prompt an immediate conversation
- Use curiosity openers to kickstart or restart a conversation in the DMs
- Use profile views as intent data to kickstart a conversation depending upon the source
- Run discovery in the DMs while obeying the Vampire Sales Rule

Next:

 [Module 16: Why You Need Inbound](#)



Module 16: Why You Need Inbound



Welcome to Inbound on LinkedIn. In these modules, we'll be covering how to build your inbound funnel. You'll learn why inbound isn't the same as being an influencer, outbound-as-inbound plays, and writing better content.

1. Social Has a Longer Time to Pipeline

Let's take a look at a fundamental feature of social selling: longer time to pipeline.

TRADITIONAL SALES



SOCIAL SELLING



**B2B
POWER
HOUR**

People don't come to LinkedIn to be sold. They log-in to learn, to be inspired, to engage. They want to meet their peers, learn from them, and scroll the news.

And to complicate matters: your name, photo, and headline is tied to everything you do on the platform. You're not an anonymous seller with an email address or a phone number. People can look you up, see what you do, and decide for themselves whether you're worth their time.

Combining these two facts leads us to a simple truth – **social has a higher bar of credibility.**

This naturally creates a trade-off. If you need to invest more time upfront to build credibility on social, the time to qualified pipeline will be longer. (See graphic above)

The interesting trade-off we see is that deals close faster when sourced from social.

Now why would that be?! Well, in our experience, it's because you've built credibility. You've done all the things you would normally do once a buyer is in pipeline... just pre-pipeline. Things like:

- Demonstrate the value of your product or service
- Identify the challenges that your buyers are experiencing
- Linking those pains with your solution
- Building trust and credibility by showing up, being generous with your time, always adding value
- Articulating a compelling pitch

In traditional sales, a lot of this happens *after* the buyer enters into pipeline. It happens on discovery calls, on calls with multiple stakeholders, and in email chains. On social, you're able to accomplish those same activities *before* the buyer enters into pipeline.

2. You Need a Lifeline

The main mistake sellers make when they start thinking about creating inbound is this: **they start to think like a marketer. Don't.**

Marketers don't have quota like you do. Marketers are trained on creating content strategies that are full-time jobs. Marketers are over-obsessed with "personal branding."

This is a guide built for sellers, not marketers. The way we think about generating inbound is **creating your lifeline.**

Think about it this way:

- If there's longer time to pipeline...
- ...and only a small % of your market is open to purchasing at any point in time...
- ...and you can only warmup a certain number of accounts using the outbound plays since they are fairly time intensive...
- ...you need a strategy to continue getting 1-to-many exposure to create a lifeline of inbound leads to help you hit quota.

This lifeline requires a steady, but not huge investment. It readily complements your outbound prospecting plays without adding too much additional time to your LinkedIn.

3. Inbound Strategies Take the Longest to See Results

We recommend starting with the outbound plays because it's easiest to generate quick results.

- The timeline for most outbound plays are 30-90 days, although the current record is 17 minutes from commenting to booked meeting.
- The timeline for most inbound plays are 90-180 days+. It's more than double the time.

This is why we think about it as creating your lifeline. It's not going to create immediate results. It's a demand generation play. But you're going to thank yourself in 180 days

time when your prospecting just somehow doesn't pay off (we've all been there) but your inbound funnel continues to create new leads to help you hit quota.



The main mistake we believe people make is they start with inbound and then wonder why they're not seeing any results. This is pervasive on LinkedIn from so. many. content. creators (become an influencer! post content! drive inbound!). Simply put: it takes longer to see results from inbound plays.

Next:



Module 17: Fundamentals of Inbound



Module 17: Fundamentals of Inbound

1. Don't Worry About Personal Branding

Not joking. Personal branding is mostly a distraction, advocated by marketers and influencers who sell courses. Remember: the main challenge you have is building credibility.

Let's consider a few personal branding strategies that we see recommended:

- Increase your follower count and earn attention with quippy posts
- Articulate a point-of-view that resonates with your audience
- Post daily

All of this is nonsense. You do not need to post daily to create an inbound funnel. You do not need a point-of-view separate from your company's to create an inbound funnel. You do not need to increase your follower count. You do not need viral posts. You don't need any of these things to be successful on social.

▼ Quick Example: Jacob Tuwiner

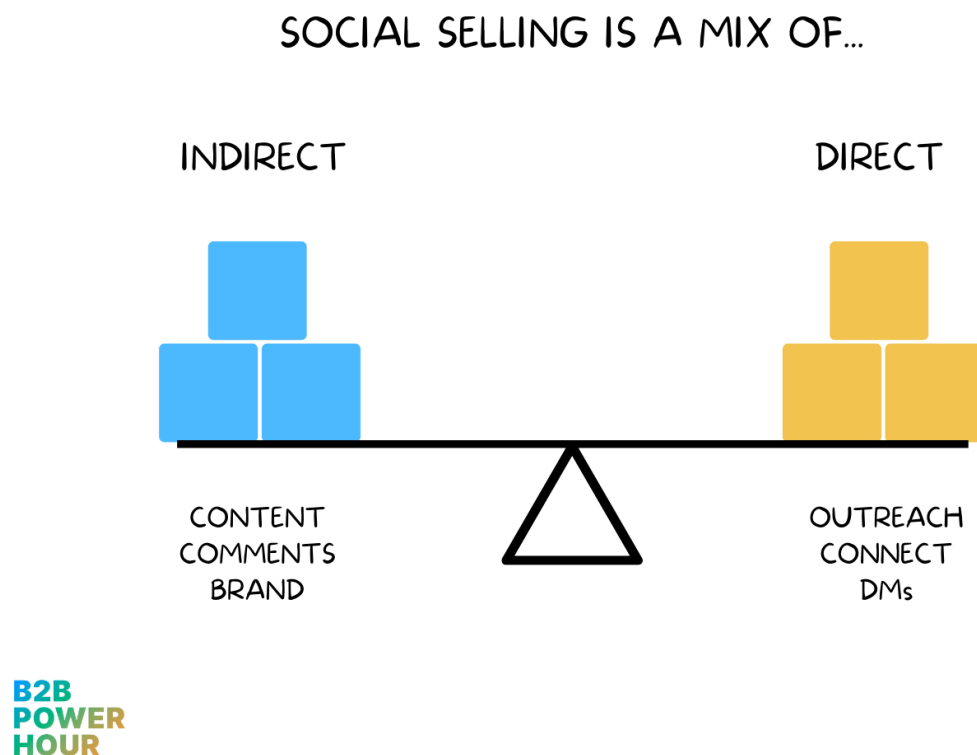
Jacob Tuwiner at Servicebell only has ~2K followers (at the time of writing). Yet in the past 60 days, he's booked dozens of meetings off of LinkedIn using a mix of inbound and outbound. His profile is tailored to building credibility on behalf of his company.

"My audience is growing. I know that's valuable – every time I post a ServiceBell video, I get new inbound leads."

You don't need a "personal brand" to earn results like these.

2. Inbound Traffic Happens from Indirect Exposure

Remember this graphic?



Now that you've worked your way through Outbound Prospecting, you'll see that *some* outbound plays include "indirect" activities. This means inbound traffic happens two ways:

1. Outbound that becomes inbound
2. Content creation

Each of these activities expose your profile to a new audience, indirectly.

For **outbound that becomes inbound**, this is when your direct activities create exposure to new audiences. So even though your comment (for example) is to a targeted ICP prospect, a *different* ICP prospect sees that comment and views your profile.

For **content creation**, this is when your content pops up in the feed, it resonates, and someone views your profile and/or clicks follow.

When you think about constructing your inbound funnel, these are the two primary leverage points to create inbound traffic. But where do you send them?!

3. Your Profile is Your Landing Page

As we hinted at in [Building Your Profile Funnel](#), the primary activity of an inbound lead is to land on your profile.

This is where the 3 Second Test becomes very important. Since it's likely the person viewing your profile is from an interesting comment or piece of content, they haven't been warmed up in the same way your outbound prospects have.

Your profile needs to accomplish a few things:

- Build credibility in the eyes of the buyer
- Connect with them authentically
- Offer a CTA (book a meeting, view a landing page, etc.)

If you've been blazing through this guide all at once, make sure to review [Building Your Profile Funnel](#) before going any further. Make sure you have each element of your profile dialed in before seriously working on your inbound.

4. Creating Inbound Serves Two Purposes

Again, we'd like to emphasize that our approach in this guide does not prepare you to become an "influencer" or "build your personal brand." We believe those are noble goals, but they're not for everyone. Not everyone's superpower is social.

In that spirit, we're only focusing on the scalable, repeatable processes that can help sellers of any kind (superpower or not) use LinkedIn effectively.

Creating inbound then serves two purposes:

1. Nurturing lurker accounts
2. Earning attention from new ICP audiences



Lurkers are an all-encompassing term we use to describe accounts that are not actively posting or commenting, but they log-on a few times a week. By the numbers, lurkers are up to 90% of all LinkedIn profiles.

Nurturing Lurker Accounts

The primary focus of your inbound activities, in our view, is to nurture lurker accounts. This is when you combine the Connection Strategies we laid out with the Content Strategies we're about to describe.

Lurkers, by definition, **will never comment or like** your content. They will see it though 🧐 This is the drastically underrated part of creating content — and why the vanity metrics of likes/comments don't matter as much as you might think they do.

When accounts aren't as active, you can build your lifeline over the next 90-180 days by using these inbound plays. It gets your profile in front of lurkers passively, since the outbound plays won't work as well.

Earning Attention from New ICP Audiences

Creating great content — or comments, even — that resonates with your ICP audience extends your reach. This gets you in front of new ICP audiences that you haven't strategically pursued with the Outbound plays.

This is a nice side-benefit: gradually earning credibility with the new audience. Instead of running warmup plays, you can use inbound plays to build credibility.

Remember: you can always run Outbound, based on the criteria we set up earlier (qualified lists, triggers, insightful outreach, etc.). Inbound is just a nice complement that builds your long-term lifeline.

Next:

 [Module 18: Outbound-as-Inbound](#)



Module 18: Outbound-as-Inbound



This is a review and repackaging of some of the Outbound Prospecting modules, but incorporating it into your Inbound funnel.

1. Obey Vampire Sales

If you recall the Vampire Sales Rule:



You are not allowed to pitch unless you are invited to.

In folklore, vampires are not allowed into your home *unless they are invited in*.

The same applies to your pitch.

We said this:

If you keep to this rule, your engagement strategy will transform. It changes the game. It will automatically distinguish you from every spam artist on LinkedIn. It also will change the way you're engaging with prospects.

This is the **the fundamental rule of outbound that creates inbound**. While other outbound plays (especially Spears and DM plays) are more specifically targeted to prompt immediate conversations, the more indirect engagement strategies generate inbound.

2. Comment Plays

Make sure to review the following comment plays:

📖 [Module 10: Influencer Comment Play](#)

📖 [Module 11: Social Listening Comment Play](#)

Comment plays are a key outbound-as-inbound tactic. Continuing to offer insightful, funny, or curious questions drive interest back to your profile.

3. The Profile Visitor DM

Restatement of this play, with additional context below.

There are a number of possible triggers for this DM:

1. Someone viewed your profile who you've been already engaging with in comments or content
2. Someone viewed your profile who is an unsaved lead at a target account (trigger in Sales Navigator you automatically set-up when saving Account Lists)

For this play, we're combining the idea of a connection request & a DM as it's possible some people will be 2nd or 3rd degree connections who view your profile. Just consider your connection request in this play your 1st DM.

<https://share.descript.com/view/IJVedK0ZTGK>

The start of the outreach will be context based.

▼ Starting from Search

As Nick says in the video, if you notice that they found you from search — bring it up in the DM and/or connection request!

Hey Nick – saw you stopped by my profile from search. Were you looking for anything in particular?

Or another option:

Hey Morgan – saw you stopped by my profile. I know we've been connected for a while, but you found me in search. What were you looking for?

▼ Starting from Conversations

If you've been having ongoing conversations with someone in the comments and see they visited your profile, use that to your advantage. This is only for accounts who you've already connected with.

You're not calling out their profile visit, instead using it as an intent trigger to prompt more conversation.

Hey... I kept thinking about that thread we had so I went looking for additional resources. Have you seen this article?

Okay so after our conversation last week I went asking around and found out...

Did you see this post? It reminds me of that convo we had last week. Thoughts?

There's so many infinite variations on this, but you're just tying together the conversations you've had with additional resources or insights.

▼ Starting from Sales Nav Trigger

There's three different options here.

1. Send a connection request that says:

Hey {firstname} - saw you stopped by my profile. Looking for anything in particular?

This is a bold one and gets rejected about 50/50. Depends on the lead — this one usually works better with lower seniority accounts (SDRs, Managers, or Specialists who have free time on their hand). Higher seniority accounts (CXOs, Directors) are prone to ignore this.

2. Run an outbound play that generates an inbound connection request.

This works best with active accounts (view their profile and see if they comment or like things). If they are active, use one of the outbound plays to warm them up and get to that Rule of 3!

3. Send a blank connection request.

This works best for “lurker” accounts — the accounts who don't post or comment, but view people's profiles. They probably will ignore anything too personalized, so it's best to send them a blank request.

When do you use this on inbound?

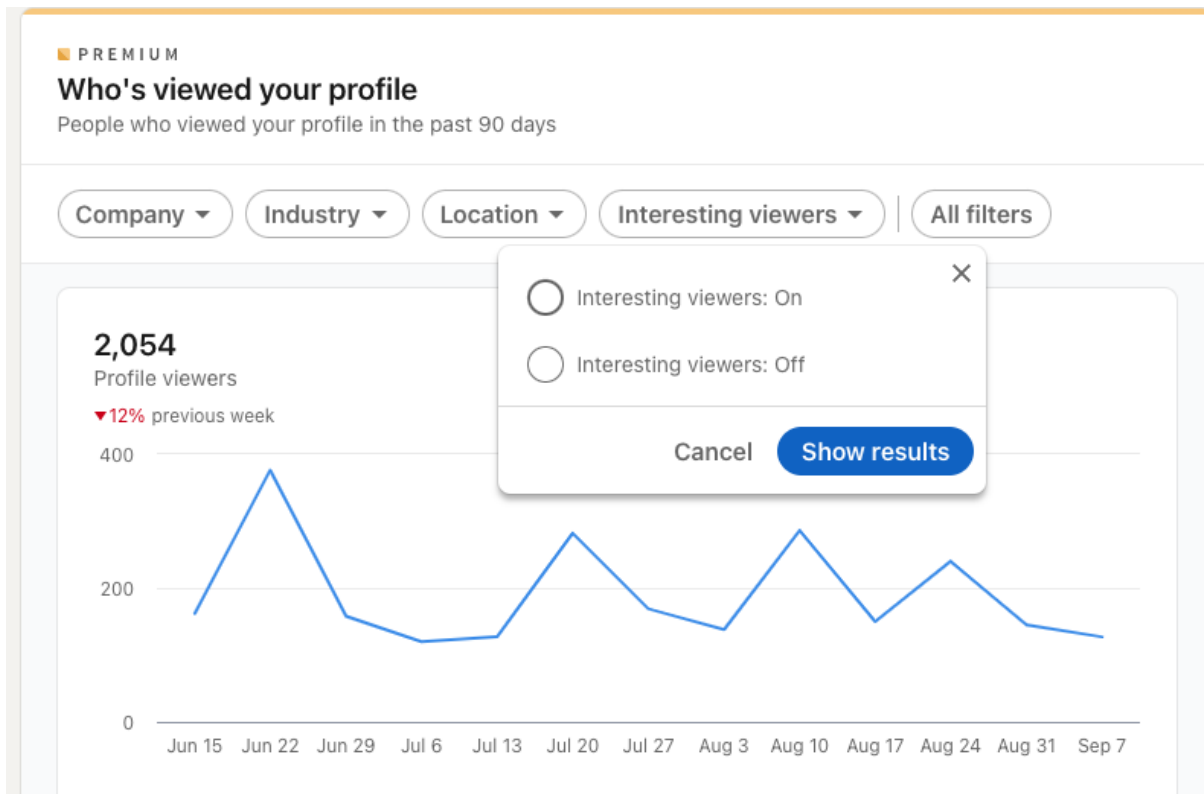
When we first introduced this play, we were hyper-focused on relevant accounts and leads from your Outbound Campaign. You will start earning hundreds or thousands of profile visitors every 90 days. So when do you use these DMs

We recommend using this play with the following:

▼ Interesting Viewers

You can filter your recent profile leads by “Interesting Viewers.”

Interesting viewers is a catch-all category from LinkedIn that is mostly senior leaders at companies or people at companies you follow. It’s a great starting point to kickstart conversations with interesting people.



When you turn it on, you can view all recent Interesting Viewers and kickstart conversations with the leads that make the most sense.

▼ Interesting Qualification Criteria

If you instead click “All Filters,” you can find filters by **Company, Industry, or Geography.**

This works really well when you have a specific geographic territory or industry vertical as your territory. You can filter by their industry or even specific company.

If you have your Sales Navigator Account Lists set up ([review that module here](#)), then you shouldn't use these filters to find targeted leads. You'll get a Sales Navigator notification anyway.

Instead, you should use these filters to find **new and interesting leads** who have viewed your profile from the same territory. Kickstart that conversation!

Filters


Company

☐ RevGenius

☐ HYPCCCYCL

☐ Fiverr

☐ Pavilion

☐ TrainYo 

+ Add a company

Industry

☐ Computer Software

☐ Information Technology & Services

☐ Management Consulting

☐ Marketing & Advertising

☐ Internet

+ Add an industry

Location

☐ New York City Metropolitan Area

☐ Denver Metropolitan Area

☐ Dallas-Fort Worth Metroplex


☐ London Area, United Kingdom

☐ San Francisco Bay Area

+ Add a location

You can always start a conversation with anyone who doesn't fit into those two buckets. However, make sure you're always prioritizing your time! Don't waste time on uninteresting leads or profiles who simply are stopping in. **Always focus your time.**

Next:

 Module 19: Content 101



Module 19: Content 101



This module is designed to introduce you to the algorithm and getting you posting. If you're already posting content, give it a skim and jump into Content 201.

1. How Does the Algorithm Work?

We're not experts on the LinkedIn algorithm, but here's the essential way we understand content works on LinkedIn:

- When you post, the algorithm serves your post up to a specific, smaller audience.
- If that smaller audience likes/engages/comments on the post, LinkedIn decides to publish it to a larger audience.
- If that larger audience also likes/engages/comments on the post, LinkedIn shows it to even a bigger audience, etc. etc.
- Hashtags are a way to expose your content to a larger audience that isn't in your immediate network (1st degree connections) or to 2nd degree connections via someone who commented (you'll see a post in your feed when a 1st degree connection comments on a post sometimes).
- Tagging is a way to leverage those 2nd degree connections too -- the feed will show when someone is tagged in another post.

There are very easy ways to abuse this (and LinkedIn is getting better at noticing this), including:

- Tagging a bunch of names in a post or a comment to try and fuel visibility

- Commenting multiple times on your own post (in our estimate, doesn't seem to change visibility too much)
- Loading up on the hashtags (after a point, they don't become useful if the algorithm decides not to promote your post to a larger audience)

Tagging a bunch of people may get visibility, but the people who you're tagging will get really annoyed you continue to tag them in things! Would not recommend it, at all. If they don't engage with the post, LinkedIn may "demote" your post and it won't achieve the desired effect.

Videos vs. Text vs. Polls vs. Other Types of Content

There are also dynamics on the *type* of content you post:

- Text posts tend to get wider reach -- more people will see it in their feed -- but less engagement because people can scroll by more quickly.
- Video posts tend to get smaller reach -- fewer people will see it in their feed -- but more engagement because, well, it's a video and people like to watch videos.
- Polls used to get explosive reach, but now they perform about the same as text posts. Polls can be useful for market research and provocative questions — but beware! Lots of users are turned off from polls.
- Posts with images seem to perform close to text posts.
- Posts with links (the embedded link preview) perform the worst. This is LinkedIn's way to combat people "shotgunning" their blog across social media. Usually, a post with a link embed is not shown all that often in-feed and gets very little reach and engagement.

Creator Mode

You can turn on an optional "Creator Mode" on your profile. This allows you to prioritize "follows" over "connects" as the option someone is served when they visit your profile. It also allows you to select up to 5 hashtags you focus your content on.

The pros of creator mode:

- When you post something that uses the same hashtags as your selected hashtags in your profile, you get a little visibility boost from the algorithm.
- Your followers/connections are slightly more likely to see your content compared to accounts that don't have creator mode on.

The drawbacks of creator mode:

- If your content does not use the same hashtags as your selected hashtags in your profile, your content does not receive the boost.
- Your content tends to have a lower reach outside of your immediate followership. So, the comments & tags won't fuel visibility as much to 2nd degree connections.'



We'd recommend **not** enabling Creator Mode until you have a solid approach to your content and a deep understanding of what you're posting and who you're posting for. That way, you can still prioritize connections with new people and experiment with content without being punished by the algorithm.

2. Content 101: Start Posting

The thing about building muscle in the gym is it requires practice.

Weightlifting is called resistance training, right? There's a lot of similarities with writing content. When you're writing content, you're going to feel resistance. You're going to feel that little voice that's like, "no, no, no, you can't post that!" Or, "That's not good enough!"

Push through that. **You're just doing some reps here.**

You're doing some reps and sets.

Create for your peers first.

Just to train that content muscle, talk about a recent call you had.

Tell stories about a recent interview.

Talk about something that happened in a previous job.

Write for your previous self. Teach them something you learned the hard way.

Make a joke about how difficult it is to get a prospect to respond.

Share a screencap (avoid sensitive info!) of a great email you sent.

You've been building relationships with your peers (remember that whole credibility challenge?). Tag them in! Ask them questions!

The point is not to get 20,000 likes on your first post. The point is to post.

It's to train that muscle. It's to do the reps, the sets of creating content. And then from that foundation there, we can accelerate this and make it much more focused.

Just start posting. This is Content 101.



We'd recommend doing reps for **at least 2 weeks**. If you've already been posting content, feel free to skip this. But it's so important just to get started and train that content muscle.

When you're ready to start making better content, jump into Content 201. 🤖

Next:



Module 20: Content 201



Module 20: Content 201



There are many ways to approach content. Here, we're outlining our straightforward process for creating content that speaks to your ICP. **This is not the only way to do content.**

1. Create a Social Listening Capture Doc

Social listening is the true starting point of creating great content. If your content has been performing well and resonates with your ICP, you can skim this. However, if you're just getting started with creating content or haven't found much success yet with your content, this is the most important step in the whole process.

The reason we create content is to **build trust at scale.** Content replaces you.

Because we're all limited in the number of hours we have per day, we can only have so many meetings and so many intro calls. By leveraging the algorithm, you can create trust by association. Every time you post a piece of content, your name + photo + headline appear. If the content is good, someone will remember your face.

Rinse and repeat 20 times. The 20th time they see your post, it's a *really* good one so they drop a like. Or they follow. Or they leave a comment. Remember: most people (90%) of active users on LinkedIn do not like or comment.

We're Trained to Pitch, Not Create Content

Because we get immediate feedback from cold calling and cold emailing, creating content can feel more difficult. We learn what makes a good cold call or cold email, because we get immediate "validation" that what we did, worked. Content isn't like that.

That's because most people do not engage with it. So, we don't get that "feedback loop" proving that what we wrote, worked.

However, posts can be seen by thousands of people. Your name, photo, and headline appear in the feeds of thousands of people, just by posting. They may not like or comment, but you can gradually build trust with accounts simply by posting. Simply by showing up.

So how do you create content that will resonate? Social listening!

Refer to the Social Listening Comment Play for our breakdown on how to do social listening.

 Module 11: Social Listening Comment Play

What you'll be doing is creating a **Capture Document** to capture insights and interesting questions from your audience. This can live in Google Docs, Notion, a spreadsheet, or whatever suits you best. It needs to be searchable + easily formatted. Here's what you're looking for:

- How are people talking about their problems?
- What are interesting comments, insightful questions, or other tidbits that caught your eye?
- What are unanswered questions that you can see, but they can't?
- What are posts that get the attention from your ICP?
- What is the information that your ICP continues to ask for, but can't find?
- ...and many more.

Review After 2 Weeks for Patterns

It's very possible within the first day you'll find some interesting insights and patterns. But, don't stop there. Dedicate at least 2 weeks to social listening. You can start creating content with the following steps before the 2 weeks are over, but we really recommend spending the time to listen in.

What you're searching for are patterns in the ways people are talking about their problems.

- What are their pain points?
- How do they talk about them?
- What is it that they really care about?

We regularly revisit our Capture Doc. The more you engage, the more you will be able to accurately answer these questions. This also helps you answer the Preparing for Your Outbound Campaign questions about who you're targeting. The more you can understand them, the better your content will be.

2. Map Themes & Topics to ICP Customer Pain Points

Now that you've listened in for a couple weeks, it's time to start listing out the specific pain points they have.

Here's what's different about this process. Instead of thinking about multiple different personas, it's time to really focus on just one ICP persona. It will likely be the dominant majority of the ICP persona accounts from your social listening strategy. What is their job title? What is their function?

You can do this exercise for as many personas as you'd like, but it's really important to start with just one persona profile. For example: "SDRs/AEs at Series B SaaS firms" or "Customer Success Directors at B2B SaaS." This will help narrow your focus on creating content.

Create Your Pain Points List

It's time to review your social listening capture doc and tease out the recurring pain points and problems. What is it that they're struggling with? Don't worry about whether you can speak about these pains or want to write content about them. Just start with a list.

For example: a Customer Success pain points/problems list from a social listening session

- Customer lifecycle continuity
- Low email connection rates on existing customers
- Workflow & setting up meetings/reminders for appointments
- Getting more reviews → indicative of trust
- Customer retention
- Lowering churn rate
- Upselling opportunities
- Referrals → higher sales performance, higher revenue
- Lowering CAC

Create Your Themes/Topics List

Now that you have your list of pain points (the things people care about), it's time to get creative! Start to generate some ideas for themes that you could talk about.

While you can really write about anything, it's important to choose a few topics that you regularly return to. We recommend starting with 3 themes or topics. These 3 themes can be big or small, but it's important to start creating content within a few specific areas.

Importantly, these themes are **likely** related to the product/company you work for.

You want to think about themes/topics that are related to the pains they're experiencing, but could also be something you regularly talk about. You're connecting the dots through your content.



As an example from the above Customer Success pain points list, here are some themes from a sales professional who has an automation tool to sell:

1. How customer success saves the day / can save the day with automation
2. Better customer lifecycle continuity
3. Upgraded retention through ease of automation

So, strictly speaking, these are topics that sit within the “wheelhouse” of the company. It wouldn’t be weird for a sales professional selling an automation tool to talk about these topics.

But, there’s additional juice added because you’ve engaged in Social Listening. You’re confident (80%+ chance) that these topics will resonate because they’re topics people are talking about out on LinkedIn.

3. Create Headline Concepts for Each Theme/Topic

It’s time for Morgan’s favorite exercise! Headline concepting is more of an art than a science, but it’s core premise is this: there are tons of different “angles” you could take for each theme/topic. We call this **The Content Prism**.

<https://share.descript.com/view/M5cvdiIM5R0>

Due to your social listening exercise, it’s possible you already know some ideas! The goal of this exercise is not to create *actual* headlines of posts, but “Headline Concepts” – short summaries of the concept.

For the Customer Success theme of “Upgraded retention through ease of automation,” here are some headline concepts:

- Shiny objects are killing your job
- Customers vs clients
- How disjointed customer experience is like a bad date
- When the trial is over and the client is gone
- Whoever said chatbots were a good idea?
- Selling while sleeping
- My company never calls me anymore
- Did we break up?
- Ghosted by my lead

These are just “ideas” for a piece of content. Not all of them are great ideas, either. The point is, you’ve generated a bunch of options! Create headlines for each of your three themes/topics.

4. Experiment with Content Frameworks & Tone

Here’s where the rubber meets the road.

Now that you have some ideas for posts, you can choose any one of the following options to create your post.

Each of these options provides a slightly different formula to reach your end-state. You can return to this list whenever you want to ask new questions, formulate a post differently, or re-do an earlier concept into something new.

This is what’s called “experimenting with content frames.” You’re framing up your content. Adding some structure. Figuring out how you want to say what you want to say.

▼ Option 1: Question Framework

1. With your headline, ask a question:

- How can people do this (with step-by-step instructions)?
 - What's an inspirational story you know in this topic?
 - What's a controversial point-of-view you have about this topic?
 - What's a good comparison within this topic? How do different companies or people address this topic?
 - What's a good example of someone doing this right?
 - What's a good example of someone not doing this right and why?
 - How does it work today vs. how will it work in the future?
2. Start with your "hook." What's the first sentence that will grab someone's attention?
 3. Write a short or long post that adds color to the question. Add some insights or examples.
 4. Post it with 3 relevant hashtags.

▼ Option 2: Story-Focused Framework

1. Select your headline concept.
2. With that topic, write a quick story by answering the following questions:
 - What was the inciting incident?
 - What did you feel when that happened?
 - What happened next?
 - How did the story resolve?
 - What did you learn?
3. This story could be something very simple. Each answer to the question could be one to two sentences. It could also be much longer.

▼ Option 3: Other Framing Devices

- Insight. Data, observations, and expertise about the headline concept.
- Takeaway. Recently our company/I did X experiment. We learned Y.
- Controversial. A hot take version of your headline to garner attention.
- Repurposed. Take an existing piece of content you already have about your headline and make into something new.

Each of these framing devices are just “prompts” for actually writing your post.

Stay Focused on Who Matters

Chances are you will get very little engagement when you begin posting. In fact, many years ago under a way-more-favorable algorithm, Nick posted for 30 days straight on LinkedIn and got maybe 1-2 likes per post. It sucked! Morgan has posted great content that gets 100 views and okay content that gets 10,000+ views.

The point is not to get stuck on the specifics of each post. It's more important to consistently get in front of the *right* people. It's better to have 2,000 followers of the *right* people than 20,000 followers of the *wrong* people. That doesn't mean the “wrong” people won't engage or comment, but they won't fuel your pipeline.

Staying focused on who matters means you get to experiment with what resonates with your Target Accounts! LinkedIn is a big platform and you get endless opportunity to try a point-of-view (or develop one) and a tone. That's why we recommend you started with comments and driving inbound from outbound. You'll learn a lot by talking directly with the people you want to serve. No pitches and no shadow pitches please!

5. Post Consistently – Not Daily

Well, maybe daily. **If that works for you!**

Most advice on posting LinkedIn content are offered by content strategists and content creators — people who are measured (at their jobs or at their firms) on the quality & quantity of the content they create. It's no wonder they recommend 30-day or 90-day challenges. Because that's the way *they* learned to create content.

We recognize our blind spots when it comes to this. As hosts of the B2B Power Hour, we have a “layer cake” of content from podcast interviews, live shows, written themes, and more. We can churn out **a ton** of content in a short amount of time. We post daily Monday through Saturday. This is because our main demand generation engine sits on LinkedIn, so there is a business case for so much activity.

But most of you reading this are not content marketers and you are judged on metrics other than the content you produce.

There are lots of ways to tackle the question “how often should I post?” Our rule of thumb is: **whatever works for you, as long as it's consistent.**

That could mean you're posting once per day. Once per week. Three times per week. Three times per month.

We do not recommend always listening to content marketers who suggest posting every day for 90 days simply to “train your content muscle.” If you want to do it, great! Go for it. 30 day challenges are a lot of fun, too, if you'd like to give it a go.


But if you don't think you have the time, energy, or attention to produce daily content, then don't! Post content once per week. It's more important that you're engaging with your audience anyway via comments or DMs, as it's a much more relevant way to build trust. Content is just another leverage point at your disposal.

So, here's what you can do:

- Choose a cadence (once per week, twice per month, etc.)
- Make your first post *tomorrow*. Don't worry too much about it being perfect, it's just important to post. It helps combat imposter syndrome and perfectionist tendencies. Even if it's Sunday and it gets no likes.
- Then, start posting on your chosen cadence. Write up a post using the templates above or something even simpler.

- Continue to work and refine the content that you're posting!

Next:

 [Module 21: Content 301](#)



Module 21: Content 301



This module is about developing your point of view. This is where most “personal branding” courses start. As we’ve said... personal branding can be great but doesn’t necessarily drive inbound deals if it’s where you start.

!! If you’re not interested in becoming an evangelist or an influencer, skip this section.!!

1. What Changes?

Content 301 is when you’re ready to actually invest in content as an extension of you and your personal brand.

This is different from Content 201 in a few distinct ways:

Content 201

1-to-many nurture sequence

Create content from capture doc

Post a few times per week

Targeted to lurker personas

Warm up accounts indirectly

Content 301

Build audience and followership

Create content from POV

Post daily

Targeted to multiple personas

Warm up audience

The metrics of success stay the same in our perspective – look at the later modules on this topic – since we still want to generate qualified inbound pipeline. But as you move

toward an evangelist play, you'll start considering follower counts and building an engaged audience.

The most substantial change comes from *how* you start creating content. The capture doc is now the foundation to your work, not the end goal. It's only a starting point for the Content Prism and now you add an essential new ingredient: a point of view.

2. Creating Your Point of View (POV)

The world is filled with noise. The mistake most make when it comes to becoming an evangelist is they **automatically think their POV is valuable**.

No offense: it isn't. To most of your target audience, you're just another voice in the noise. There's no strong reason to pay attention to you... yet.

This is why starting with Content 201 is so crucial.

- Your capture doc helps you ID what pains and problems your audience is experiencing
- Your content becomes “validated” → content that speaks to your intended audience
- You have a feel for articulating headlines and frameworks
- You understand what it takes to write (decent) content

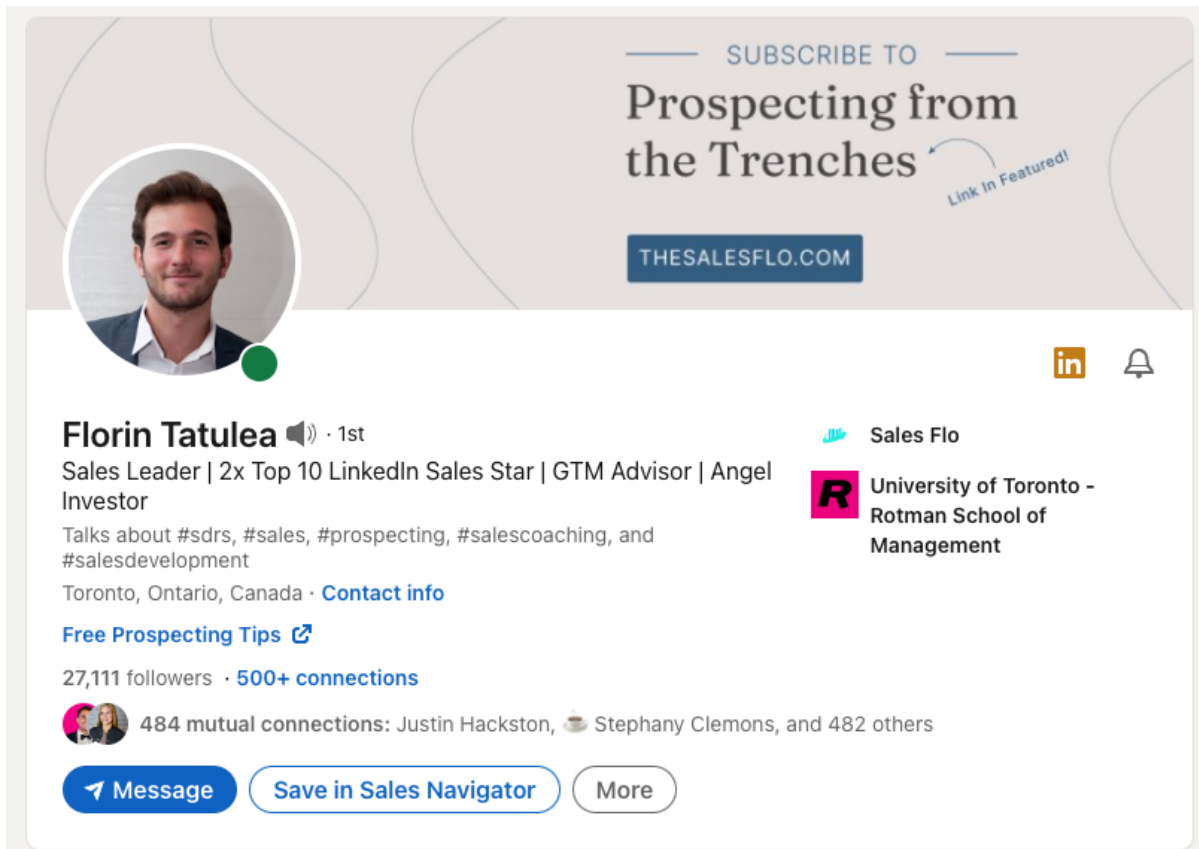
Now, we're going to add a layer to the Content Prism. **Your Point of View**.

Your POV is a mix of three crucial ingredients:

1. A unique perspective or opinion
2. A powerful story that informs your unique perspective
3. An insight that you can't find elsewhere

This framework is directly informed by Morgan's work as a brand strategist for years with multimillion dollar brands. These same ingredients are essential to making you successful in articulating your POV.

▼ POV Breakdown: Florin Tatulea



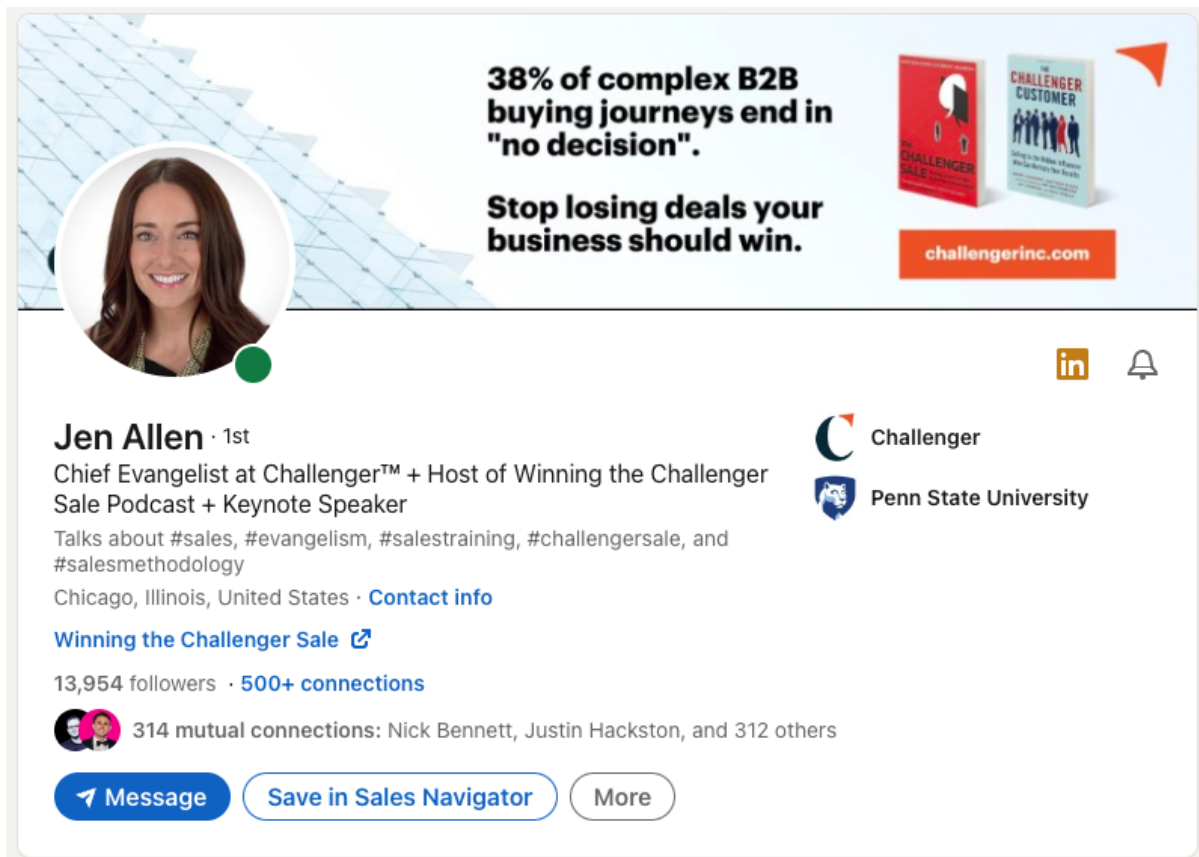
Florin is a well-known sales trainer and influencer on the platform. Let's breakdown the key elements of his POV.

- **Unique perspective or opinion:** "There's a lot of information out there about what works and what doesn't when it comes to outbound and prospecting. A lot of it comes from coaches and influencers that have not been operators in an SDR/AE role or B2B SaaS environment in years."
- **Powerful story:** "I was lucky enough to be the first sales hire at Loopio and have had the opportunity to be a part of and contribute to the exponential growth


that had led us to a sales team of ~50 strong. In my 6.5 years at Loopio we grew revenue by 65x.”

- **An insight you can’t find elsewhere:** Florin’s recurring series on SDR tips from the trenches, informed directly by his experience, but particularly the way he structures his email advice and copywriting advice (his niche).

▼ POV Breakdown: Jen Allen



The image shows a LinkedIn profile for Jen Allen. The header features a blue geometric pattern on the left with a circular profile picture of Jen Allen. To the right of the photo, text reads: "38% of complex B2B buying journeys end in 'no decision'." and "Stop losing deals your business should win." Below this is a red button with "challengerinc.com". To the right of the text are two book covers: "THE CHALLENGER SALE" and "THE CHALLENGER CUSTOMER". The profile section shows Jen Allen's name, title "Chief Evangelist at Challenger™ + Host of Winning the Challenger Sale Podcast + Keynote Speaker", and a list of hashtags: #sales, #evangelism, #salestraining, #challengersale, and #salesmethodology. It also shows her location as Chicago, Illinois, United States, and a link to "Contact info". Below this is a link to "Winning the Challenger Sale" with an external link icon. The profile has 13,954 followers and 500+ connections. It also shows 314 mutual connections: Nick Bennett, Justin Hackston, and 312 others. At the bottom are buttons for "Message", "Save in Sales Navigator", and "More".

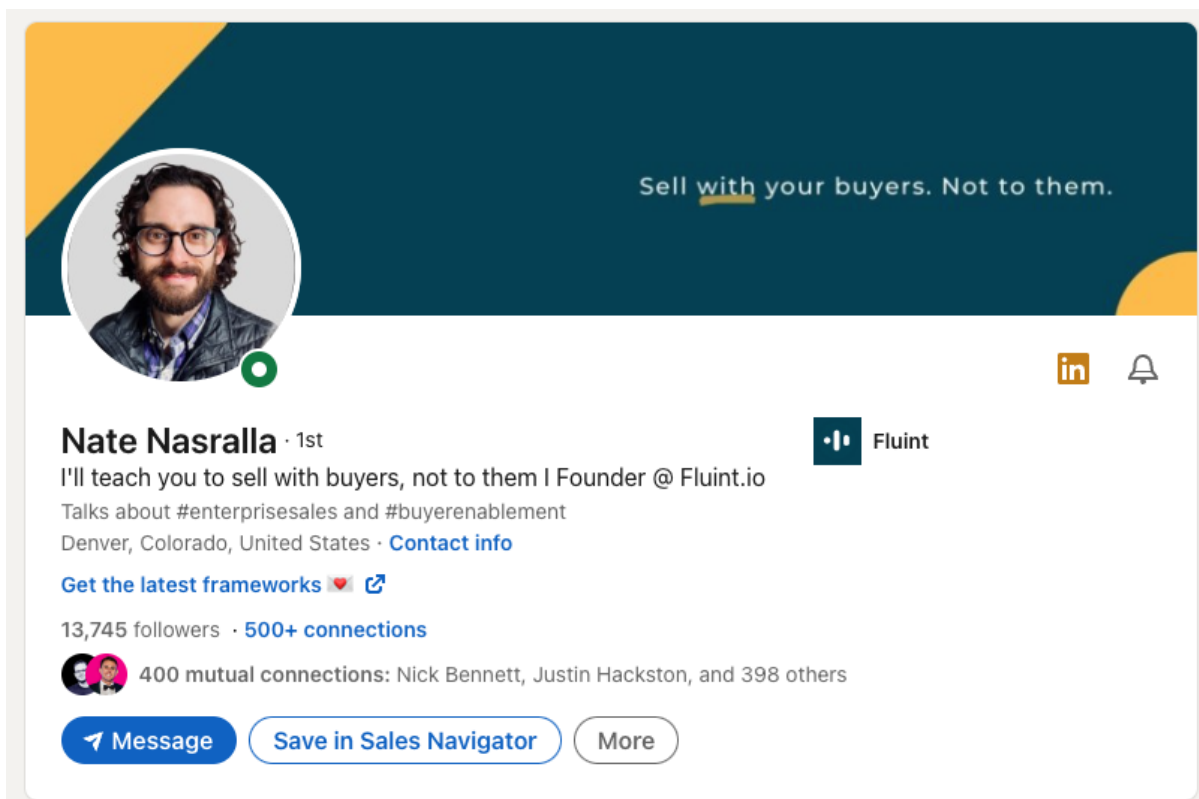
Jen Allen · 1st
Chief Evangelist at Challenger™ + Host of Winning the Challenger Sale Podcast + Keynote Speaker
Talks about #sales, #evangelism, #salestraining, #challengersale, and #salesmethodology
Chicago, Illinois, United States · [Contact info](#)
[Winning the Challenger Sale](#) 
13,954 followers · 500+ connections
314 mutual connections: Nick Bennett, Justin Hackston, and 312 others
[Message](#) [Save in Sales Navigator](#) [More](#)

Jen Allen is the Chief Evangelist at Challenger and is a well-known host of the Winning the Challenger Sale Podcast. Let’s break down her POV.

- **Unique perspective or opinion:** “38% of complex B2B purchase attempts end in "no decision" and involve ~11 customer stakeholders. We're not losing to our competitors. We're losing to customer risk aversion.”

- **Powerful story:** Jen has a unique position where she can use Challenger’s own story (by extension) and their deep research that has been published in multiple books and referenced across the sales industry. But personally – she also has an extraordinary career in enterprise sales that adds credibility to her content.
- **An insight you can’t find elsewhere:** Ways to navigate the complex enterprise sale by resolving buyer group conflict, developing commercial insights, and more Challenger-related concepts.

▼ POV Breakdown: Nate Nasralla



Nate Nasralla has recently blown up in the enterprise sales space due to his unique style of content and his POV.

- **Unique perspective or opinion:** “Sellers don’t close deals, buyers do. The make-or-break moments in a complex deal happen without sales reps in the room.”
- **Powerful story:** In addition to Nate founding a product that helps sellers navigate his POV, he also was an enterprise seller and previous founder that

sold into enterprise.

- **An insight you can't find elsewhere:** Nate's "The Enterprise Sales Playbook" is the linchpin of his insight: how to build champions when you're not in the room. This is built from his unique experience and shared with graphics, narratives, and more.

So break down each element of your POV:

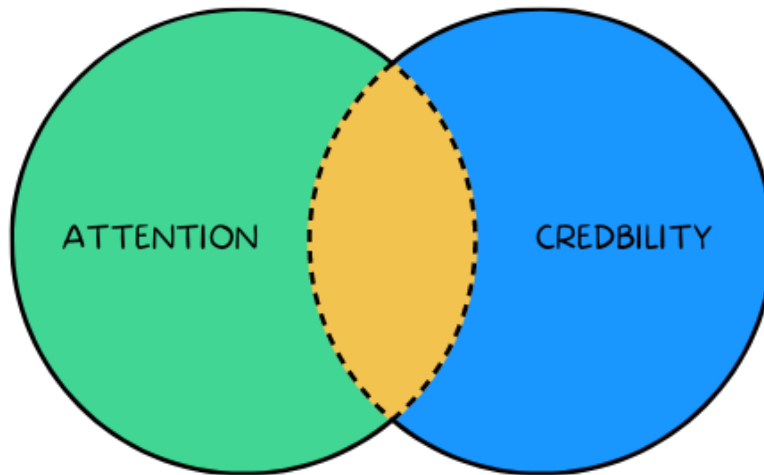
- **A unique perspective or opinion:** This is the "bright line" you draw in the market for your audience. What will people learn from you? Why should people listen to you? What is the flag you're planting in the ground?
- **A powerful story:** What's your background or current position that provides credibility to your perspective? Is it your experience? Research? Experimentation?
- **An insight that you can't find elsewhere:** What will people keep on coming back to you for? What's something they can't get elsewhere? What's the nugget of truth inside your perspective that you can always return to?



The most common area people struggle with is **an insight you can't find elsewhere**. This is because we aren't used to having to articulate something truly different. You don't need to develop this overnight. It took us ~3 months to really get to a point where our insight was truly unique. The full, written version is available as [Alignd's Thesis](#).

3. Attention is Temporary. Credibility Isn't.

DON'T CONFUSE ATTENTION FOR CREDIBILITY



**B2B
POWER
HOUR**

People confuse attention for credibility.

- **Attention** is a short-term reason for people to pay attention to you. Attention is often generated through personality, spectacle, controversy, and value delivery.
- **Credibility** is a long-term reason for people to pay attention to you. Credibility is built through consistency, generosity, trust-building, and value delivery.

So yes, there's overlap. And having lots of followers does tend to lend you credibility.

Over-optimizing for attention is why accounts can grow quickly. They're fun to pay attention to, engage with, and participate in the spectacle. But it's also the reason many accounts cannot sustain engagement. They haven't built up enough credibility.

Accounts will earn thousands of followers in a month but then 90 days later, they can't seem to sustain the kind of engagement they had previously. Their followers have now tuned them out because the credibility hasn't been built up.

This is why each element of your POV is crucial.

- Your unique perspective gives them a reason to continue to pay attention (it will draw a line in the sand for your audience and pique curiosity)
- Your story builds credibility, so as they pay more attention to you and learn more about you, your story reinforces the attention you're earning.
- Your insight gives them a reason to keep on coming back. If they can't get what you offer from anywhere else, that builds credibility *and* attention.

When you add this layer to your Content 201 strategies, your content really can take off!

4. Developing Your Insight

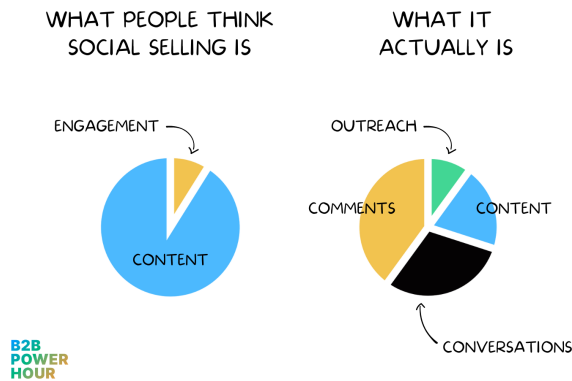
This is it. The big kahuna. This section will transform everything about the way you create content for your audience. If there is one thing that will change everything about content, it's the insight that you're delivering. So, how do you do it right?

First off: what's an insight? We like the way Challenger proposed it in *The Challenger Customer*:

What do our customers fail to fully understand about *their* business, but should?

You're not reframing a product. **You're reframing their problem.**

We eat our own dog food, so consider

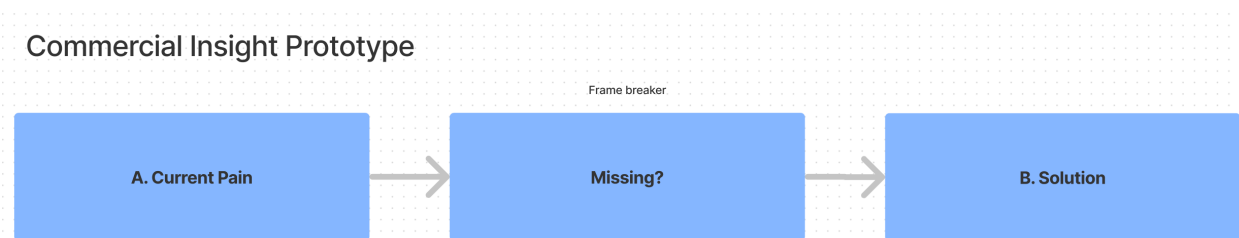


this graphic we created. We share this out regularly.

This isn't promoting a social selling service. It isn't talking about a product feature. *It's not even talking about an identified pain (Content 201).*

It's an insight we have, that the way people think about social selling is all wrong.

The general framework that *The Challenger Customer* proposes is as follows:



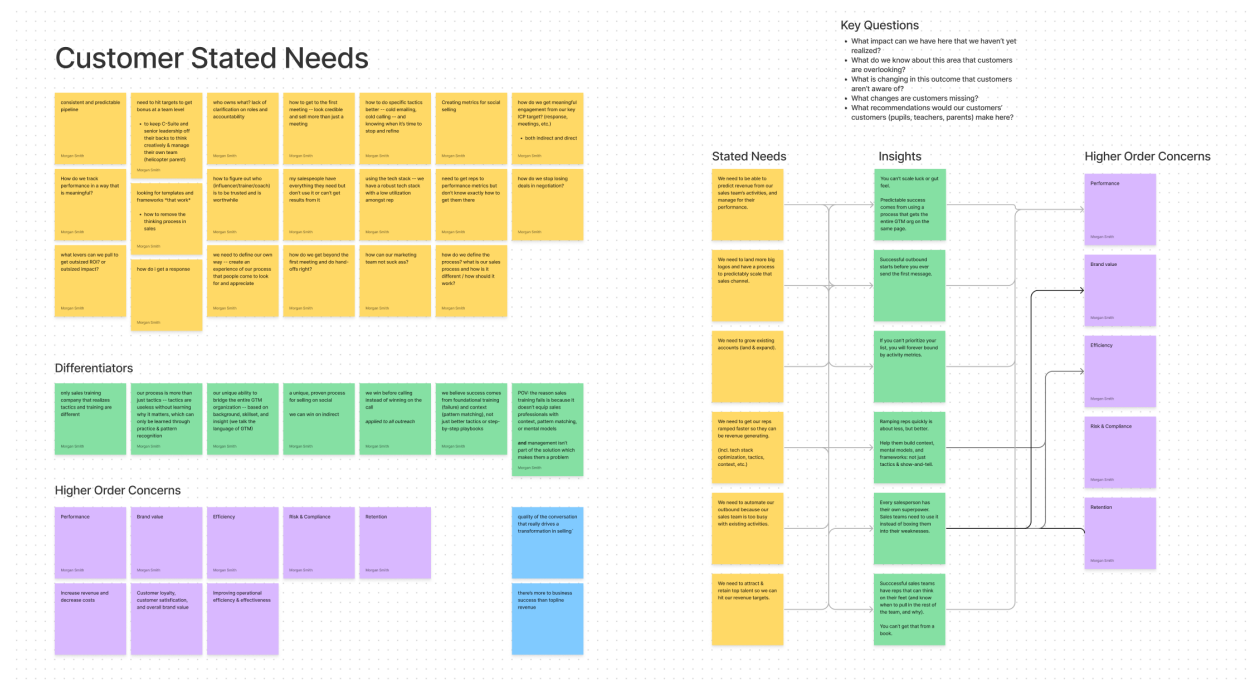
- **A. Current Pain.** What is the current problem they're experiencing? What are the pains that they have? This is stuff you should have identified in Content 201.
- **Missing?** Instead of articulating some fun headlines, now it's your job to point out what they're missing about *their own problem*. What are the dots you can connect that they simply cannot connect by themselves? This is the "frame breaker," something that once you know it, you can't un-know it.
- **B. Solution.** Now, you tie it back to some solution that you offer. But that solution should seem obvious based on the insight you provided. The reframed problem flows naturally to the solution as offered.



The insight should be product agnostic. It should not feel like the insight is leading someone back to a product. The insight itself should simply reframe the problem people are having. It should be all about the problem. If your insight sounds like it's leading back toward a specific product you offer, you have not correctly articulated the insight.

5. Tie Your Content Together

The full exercise of developing your insight looks something like this:



This is an actual insight mapping exercise we've done. We're not keen on violating copyright, so we'd encourage you to look into *The Challenger Customer* and follow their prescription for developing the insight at a really deep, meaningful level.

But suffice it to say:

- Take all of your buyer's stated needs (yellow) and lay them out, one-by-one. Use Content 201 and social listening to list them all out.
- Write out all of your differentiators (green) one-by-one. These are the things that make YOU or what you OFFER different from anyone else in the market.
- Write out the higher order concerns of the buyer's. Sure, they're talking about their day-to-day problems. But what higher order problems do they lead you to? These are usually things like "profitability," "efficiency," or other executive goals.
- Then map them together. Take the stated needs and tie a key insight to one of the higher-order concerns. Connect the dots and help your buyer rethink their problem.

This is a **very powerful** exercise tying together what people *think* they know about their problems and compare it to what *you* know about their problems.



Start testing out the insights as different posts and see which ones resonate the most. Then tie in your POV! Your insight is one of three ingredients. Don't forget to intermix your story and your unique perspective on the issue. When combining all three, you'll have an infinite mix of content types.

6. Evolving the Content Prism

In Content 201, you learned about the Content Prism as a way to map pain points to themes/topics and develop them into headline concepts for posts.

In Content 301, we're going to take this a bit further and incorporate your POV into some of the posts.

Here are some options to consider:

The Pure POV Post

The Problem-Insight Post

This is a post where you simply write up your perspective on an issue. Tell a story, share an interesting insight, or plant your flag.

The Insight-Only Post

The first sentence should be your insight. “Social selling is more than posting. It’s a mix of many activities.”

Then, explain your insight in further detail.

The first sentence should be the problem. “Sellers keep on telling me they can’t get people to pick up the phone.”

Then explain where they’re going wrong using your insight.

The Insight-Story Post

Tie together your story from your POV and tell how you came to understand the problem differently.


Usually story posts will start off with a “context setting” sentence like:

“In 2007, I sold my biggest deal ever. Then everything went wrong.”

There are many other options to generating posts using your POV (and in particular, your insight) but this is what upgrades your content from a simple 1-to-many nurture sequence in Content 201.

Share your story. Offer your perspective. Demonstrate your insight. These are the key ingredients to attracting new clients at a high level with great content.

Next:

 [Module 22: Fundamentals of Social for Strategic Accounts](#)



Module 22: Fundamentals of Social for Strategic Accounts



Welcome to Breaking into Strategic Accounts. In these modules, we'll be covering how to use social to break into strategic accounts. You'll learn the strategy behind using social, layering in the Outbound plays for larger firms, and identifying which leads are the best targets for using social.

If you don't sell into enterprise, then it isn't for you! Skip to the Daily Workflow modules.

1. Map the Earthquake

Let's begin with the fundamentals of all enterprise prospecting: mapping out the account.

We have a slightly different take. You want to map the account as if you're thinking about an earthquake "rippling out" inside the company from the source of the problem.

<https://share.descript.com/view/9L6ryqKPTq9>

▼ Formalizing the Earthquake

If you want specificity to this exercise, you could think about these in 3 or 4 rings.

- **Ring 1:** Epicenter of the workflow. The person most impacted by the problem you seek to solve. Who has the largest problem with the most frequent pain?
- **Ring 2:** Who's above and below them inside the organization? Map out the people who work for them (who suffer the consequences of the problem) and the people they report to (who don't see the problem day-to-day but care about the results).
- **Ring 3:** Who likely holds signing authority to solve this problem? This might have already been identified inside Ring 2, but who are the stakeholders who will be involved in alleviating this pain?
- **Ring 4:** Any further executives who will be impacted by the change.

GUT CHECK: Who are the 5-10 people that need to know about us inside the account?

Gather the 5-10 people who sit inside the ripple effects of the Earthquake into a spreadsheet, doc, or notes. It's your starting point.

2. Three Tiers of Activity

Every account you're trying to break into has three tiers of prospects. If you mapped out the account, you would discover:

1. Prospects who are actively posting original content (Tier 1)
2. Prospects who are actively liking, commenting, or resharing posts but not creating original content (Tier 2)
3. Prospects who have an account but are lurkers (Tier 3)

We previewed these tiers in the [Account Dogpile](#) play. Not every prospect at each tier will be inside each circle of the earthquake.

In fact – we are relying on there being many different tiers across teams and levels of seniority. This allows us to route top-down and bottom-up inside an account (on top of using social for account research). Social becomes one of a few channels you will use to route into the account, depending upon the motion and the tiering of the leads.

3. Use Sales Navigator to Create Lead Lists with Notes

Create a lead list per strategic account. You're going to use the Lead List inside Sales Navigator to simplify access to the 5-10 accounts you identified inside the Earthquake.

- Create one lead list per strategic account
- Save each lead to the lead list
- Add notes to each lead identifying which Tier they are (Tier 1/2/3)

Let's say I'm prospecting into Balto, a customer success tool that uses AI. I've identified Bryant, an Enterprise SDR, as someone who sits inside the Earthquake. He's someone I need to talk to.

Name	Account	Geography	Notes ⓘ
<input type="checkbox"/>  Bryant Istre 1st 1 List ⓘ Enterprise Sales Development Representative	Balto	Washington, District of Columbia, United States	<input type="text" value="Add note"/>

I take a look at his profile on LinkedIn and see how active he is. In this case, I see he's been commenting but not posting, so I would add "Tier 2 (Comments)" note into his entry.

▼ Bonus Benefit of Adding Leads to Sales Nav Lists

When you add leads to the list, they are identified to a specific account. When they leave that account, you get a nice little notification inside Sales Navigator.



Castille Rodriguez 1st | 1 List | 
ESG Growth Enablement

Klue
 Left account. [Edit Account](#)

Once you've actually qualified a deal and are working on discovery, demos, and closing the deal, this data is less important. But for upfront prospecting and trying to break into an account — this is definitely a nice bonus.



You can add these notes inside your CRM, of course. But from a workflow perspective — if you're using social for prospecting, it's best to keep all that data in one place instead of having to jump between tabs. Why duplicate your effort?

Yes, this is manual work. It's also why we only recommend this with strategic accounts. The juice needs to be worth the squeeze. Your normal Outbound Prospecting plays work well for SMB and mid-market deals, but once you move upward into enterprise, the upfront work will pay-off.

4. Prepare for Prospecting

It is **very normal** to not have any Tier 1 leads inside an account. That's because original content creators are only ~1% of the whole platform. But you should have a few Tier 2 and a good chunk of Tier 3 leads.

This preparation work allows you to consider the following:

- What are the easiest routes into the account using Outbound Prospecting plays?
- What leads will need to be accessed off-platform?
- What leads can I nurture with my Inbound Funnel?

In the rest of these modules, we're introducing a few key strategies – using data sources outside of LinkedIn to automatically trigger outreach to various tiered leads, using social for account research, and then routing into the accounts.

There is so much about enterprise selling that is not in this section. It would be extremely ambitious for us to teach LinkedIn prospecting *and* enterprise selling all in one. However, we recognize that the upfront prospecting work required for breaking into strategic accounts determines a lot of your success.

Some people you should follow (if you're not already) that can help with the entire enterprise selling game:

[Nate Nasralla](#)

[Jen Allen](#)

[Brandon Fluharty](#)

[Jamal Reimer](#)

[Salman Mohiuddin](#)

[Kyle Asay](#)

[Ian Koniak](#)

Next:

 [Module 23: Dynamic Prospecting](#)



Module 23: Dynamic Prospecting



Dynamic prospecting is an extension of the Accounts and Lead List module, particularly around the use of triggers. When breaking into strategic accounts, it is important to set up the system you'll use to identify, sequence, and prioritize outreach.

1. What is Dynamic Prospecting?

<https://share.descript.com/view/HBtKvWLnfg>

Static prospecting is the traditional way of segmenting a list – demographics, firmographics, technographics. Great broad strokes that build your Qualified TAM list. But it doesn't answer – why now? And it requires manual refreshes.

Dynamic prospecting is using automated triggers, events, and other data sources to prompt your outreach. It is event-based data (instead of "object-based data").

Think of it this way: most static data will not change in a 60-90 day window. The company will still be in the same industry, their CRM tech stack will still be mostly the same, their growth rate won't substantially change.

Most dynamic data will change in a 60-90 day window. They will hire a new senior leader, they will raise funds, they will layoff or hire a lot of people, they'll purchase new tech, they will get inundated with poor G2 reviews, etc.

This dynamic data is what demonstrates it's a good reason to reach out **today vs. 60 days from now.**

Republishing the example trigger ideas from the [Account and Lead Lists](#) module here:

▼ Example Triggers (Table of Ideas)

Full credit to [Jesse Oulette](#) for this wonderful list. We could add a couple but honestly... this is a great starting point.

Expansion / Relocation	New job / position for a current contact
Increase / Decrease in Customer Base	Dissatisfaction with Current Vendor
Increase in Hiring Velocity	Positive / Negative Press Coverage
Creation of New Job Title	Increase in positive / negative employee reviews
Increase in Business Expenses	Increase in positive / negative reviews on G2
Competitor Launched a New Product	New website / major website changes
New Executive	Lawsuits
Merger/Acquisition	Website security issues / prospect website issues
Layoffs	Increase in demand for prospect's product
Change in Management Strategy/Restructuring	Selling Assets / cutting losses
Shift in Sales Channel (Inbound vs. Outbound)	Company facing piracy issues
Increase/Decrease in Marketing Budget	Creation of new job title
Entrance into New Markets	Bad quarter
Change in Marketing Channel	Good quarter
Funding Rounds	Increase in software expenses
Major Customer Announcement	Change in web traffic
New Product/Service Announcement	Q&A threads related to prospect questions
Major Industry Development	New technology trend
New Legislation	Event Announcements

Awards/Recognition	Change in Marketing Agency
Analyst Report	New Tool Adoption

2. Automate Your Dynamic Prospecting

The good news: data is your friend. When prospecting into larger accounts, you do not want to manually scrape for this data. Instead, you will want to create an automated workflow that allows you to gather the trigger data without additional effort.

We're outlining two key automation tools that are fairly simple to setup for dynamic prospecting, but there are many additional ways to create this automation stack.

The goal is simple: create a flow of information, based on key triggers, that indicate the timing is right to start warming up the account and reaching out.

3. Dynamic Triggers with Sales Nav Saved Searches

Account Searches

Use Sales Navigator to create an Account search based on the qualification criteria you laid out in the Account and Lead Lists module.

Now, save the search in the top right corner.

[Saved searches](#)

☐ Select all
 [Save](#)
[Unsave](#)
[View current employees](#)
348 results
[Save Search](#)

LinkedIn will prompt you to save this account. The important thing is to **give it a descriptive name.** Don't settle for just a bunch of meaningless data points. You'll want to provide future you the context.

Save your account search

×

This search will be saved to your saved account search page. Results are updated daily and you will receive emails on saved search alerts weekly.

Name	Created on
<input type="text" value="Account Search 1"/>	10/13/2022

Cancel

Save search

Now you can find these saved searches at the top on the right hand side of the search bar.

Lead filters +

Account filters +

Saved searches

Lead Searches

Use Sales Navigator to create a Lead search within a Qualified TAM list. As mentioned in Account and Lead Lists, we're not a huge fan of using Lead lists for effective outbound.

But, as you're prospecting into enterprise accounts, lead searches are an excellent opportunity to more effectively prospect into organizations.

- Filter the search by your saved Qualified TAM Account List
- Search for specific leads by Job Titles, Mentioned in the News, and/or Seniority Level (or any other lead filter that makes sense)
- Save the search with a context-providing name

Imagine these scenarios.

Scenario 1: A CEO of a company in your Qualified TAM list was mentioned in the news for a big transformative push they're championing inside their organization. LinkedIn will now update that saved search for you with that CEO so you can do deeper digging.

Scenario 2: A Senior Director of Data Analytics was just added to a company. These roles are usually great champions for your product. LinkedIn will update that saved search for you with the new Senior Director so you can view their profile, tier their profile (Tier 1, 2, 3), and start engaging with them effectively.

How It Works

LinkedIn updates every saved search daily. So as new accounts or leads fit the criteria based on the available data inside LinkedIn, there will be new results in your saved search.

- Use account searches to identify new accounts that meet your base level of qualification (Qualified TAM) and spark further research
- Use lead searches to identify new personas within your Qualified TAM list to spark further research and conversation

4. Dynamic Triggers with Google Alerts

Google Alerts helps you scrape the web for insights.

Let's say we're prospecting into Walgreens. We're going to set up a Google Alert based on the CEO (Roz Brewer) and "acquisition" to keep tabs on when the CEO is talking about acquiring companies.

This is what it looks like:

Alerts

Stay informed when your name appears online

 Roz brewer acquisition



How often	At most once a day	⬆️⬆️
Sources	Automatic	⬆️⬆️
Language	English	⬆️⬆️
Region	Any Region	⬆️⬆️
How many	Only the best results	⬆️⬆️
Deliver to	morgan@getalignd.co	⬆️⬆️

Create Alert

Hide options 

Alert preview

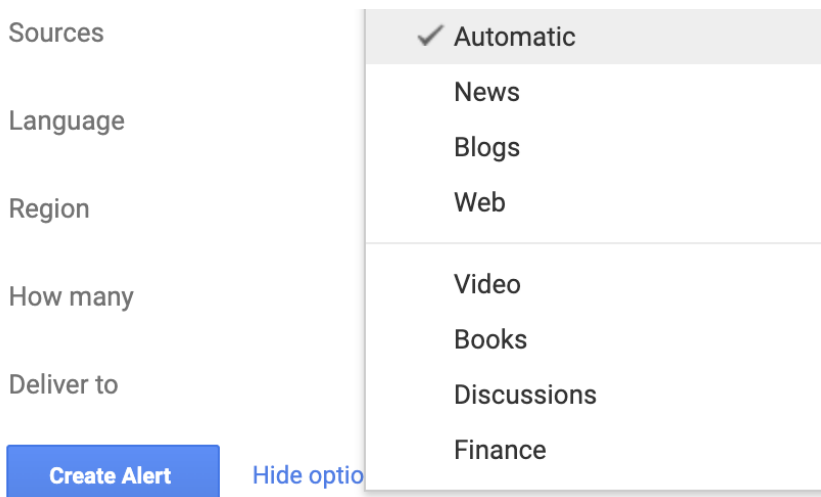
NEWS

Walgreens buys the rest of CareCentrix for \$392M - Advisory Board

Advisory Board

... Walgreens announced plans to **acquire** the rest of the company—a deal ... from our partnership with CareCentrix," said Walgreens CEO **Roz Brewer**.

I can use the provided optional filters to filter down my results – only getting news from certain regions of the world, how often I want to receive this update, what languages, etc.

A screenshot of the Google Alerts settings interface. On the left, there are labels for 'Sources', 'Language', 'Region', 'How many', and 'Deliver to'. Below these is a blue 'Create Alert' button and a 'Hide options' link. A dropdown menu is open, showing a list of sources: 'Automatic' (selected with a checkmark), 'News', 'Blogs', 'Web', 'Video', 'Books', 'Discussions', and 'Finance'.

You can also filter by specific sources on Google – only looking for new videos, for example, or only alerts from News instead of everything else.

There are **so many** ways to use Google Alerts. It might feel overwhelming, so here are some of our favorites:

- CEO's name + podcast = alerts when there's a new feature of a CEO on a podcast
- Company + acquisition = alerts when the company is acquiring another company (or being acquired)
- Company + key phrase = alerts when there are press releases using that key phrase. Especially useful if you sell in niche industries ("Walgreens interoperability") where the stakeholder is using the same language you sell with.

5. Other Dynamic Triggers

There is a **plethora** of sales intelligence and sales data tools that can offer other triggers. Every major intelligence platform has some version of automated, dynamic triggers that can prompt outreach.

We recommend **staying away from** funding round and leadership change announcements. These “triggers” have been used and abused by automation tools. They are not sufficiently meaningful anymore and outreach based on those triggers will likely be ignored because it will be viewed as spam.

Use these dynamic triggers to identify new high-value accounts and leads within those accounts for your prospecting motion.



Remember! If the new leads from your saved searches seem like good fits, then make sure to save them to your lead list and tier them out (Tier 1/2/3) as explained in the previous module, Module 22. That way you know what outbound strategy you’ll use to work with the profile.

Next:

 Module 24: Using Social for Account Research



Module 24: Using Social for Account Research

1. Create a 60 or 90 Day Goal

CHALLENGE: How can you get a meeting with the key stakeholders in the next 60 or 90 days?

This seems like an obvious challenge, right? We all want that meeting. But here's the twist: how can you get the stakeholder to *ask you for a meeting*?

Let's solve for this twist. What would be required for that stakeholder to ask *you* for a meeting?

- A general awareness of who you are
- An understanding of what your product/service does and how it might help
- A curiosity in learning more that speaks to being problem-aware



It's very likely that you will still need to ask for the meeting. The point isn't to restrict ourselves from asking for meetings. It's to challenge the way we use social to break into strategic accounts.

These four modules (account research, routing in bottom up, routing in top down, layering your approach) speak to this challenge. We all want to get to that meeting. But

social offers new opportunities to get in front of the right people, in the right ways,

2. Building Your Pattern Recognition

Tacit knowledge is knowledge that cannot be captured through words alone.

Tacit knowledge is, essentially, pattern recognition. It's a mostly unconscious ability to spot who's a good prospect, who's not, and why. You will likely struggle to articulate *why*, but you have this "spidey sense" of who would be a good fit.


Building pattern recognition is the fundamental skill of all prospecting. If you've been at this game for a while, you probably have a strong skill of pattern recognition.

Using social for account research is a key way to build pattern recognition over the course of your prospecting. You can use the tools at your disposal to develop this skill. Let's dive in.

3. Using Social Listening

Review these modules:

 [Module 11: Social Listening Comment Play](#)

 [Module 20: Content 201](#)

In the Social Listening Comment Play, we introduced searching for problems and pains using key phrases, comments, posts, and hashtags.

In Content 201, we introduced building a Social Listening Capture Doc to capture those problems and pains in a one-stop shop.

Now, **let's upgrade this.** Those are great plays for getting started. As you're prospecting into strategic accounts, you need to tighten your focus.

1. Create a Social Listening Capture Doc per industry vertical or even per persona. If you consistently build champions with one kind of persona, create a Capture Doc for each persona in that industry ("Medtech CFO Problems & Pains").
2. Use Social Listening for Tier 1 and 2 leads (see below) to capture insights from the most active profiles at each account or in each persona. Copy and paste those interesting comments and posts into the Capture Doc for that persona.
3. Use Social Listening to identify general trends in the industry from profiles outside of your account list. For example – are there profiles who share job titles or similar roles in the industry, but work for an account who isn't the right fit? Use those profiles to also download information into the Capture Doc.

Building pattern recognition (tacit knowledge) comes down to your ability to look through your Capture Doc every couple of weeks and identify:

- What are the ways my prospects talk about their problems and pains?
- What are the top priorities for this key persona in the industry right now?
- What are the key insights they're missing about their problem? How can I help them connect the dots between their problems and our approach?



We'd recommend staying away from creating a Capture Doc per account. There likely isn't enough activity in that one account to build enough tacit knowledge. It's likely that similar personas at similar companies are experiencing the same problems, which is why creating a Capture Doc per vertical or per persona is the most useful.

4. Using Tier 1, 2, and 3 Leads

Review these modules:

📖 [Module 10: Influencer Comment Play](#)

📖 [Module 22: Fundamentals of Social for Strategic Accounts](#)

Tiering out your accounts means you have identified (1) who is posting original content, (2) who is actively engaging on the platform, and (3) who are lurkers.

Use each of these tiers to your advantage to conduct account and industry research!

1. **Tier 1** profiles offer the opportunity to engage directly on their original content. Use the influencer comment play on Tier 1 profiles to kickstart engagement with the profile and the ICP users in the comments.
2. **Tier 2** profiles offer the opportunity to study what kind of content they're engaging with and what they're commenting (Social Listening). It also allows you to paint a picture about what priorities are important right now based on their engagement profile.
3. **Tier 3** profiles don't offer much for account research. Good to know now instead of wasting your time!

Tiering out your leads also prepares you for the next module, using social to route bottom-up.

Once again, mapping out these tiers allows you to prioritize the **right profile** with the right kind of engagement. Sometimes it's just using it to study their engagement. Other times it's engaging directly on their original content or replying to their comments and folding it into your Social Listening Capture Doc.

5. Using DMs

Review these modules:

 [Module 7: Fundamentals of Social Outbound](#)

 [Module 14: Spears & DM Plays](#)

Use the DM conversations you're having based on these outbound plays to learn about what are the top priorities in your industry. **Obey the Vampire Sales Rule.** Keep asking insightful questions, have good conversations, and learn what's on your prospect's mind.

Using DMs in this way instead of just outright pitching a meeting builds insight into what actually matters. You can use this to great effect when layering in approaches with email and phone.

Next:

 [Module 25: Using Social to Route Bottom-Up](#)



Module 25: Using Social to Route Bottom-Up

Before You Begin

Using Social to Route Bottom-Up uses Tier 1 and 2 profiles who hold varied job titles to earn a referral and introduction to other stakeholders inside the account. This mirrors the [Account Dogpile Play](#) at a more strategic level.

This play works best with the following types of accounts:

- Accounts with at least one Tier 2 profile in your Earthquake Map who's actively commenting

This play has two results:

- Learning more about what's going on inside the account
- Earning a referral or introduction

The Play

Step 1. Identify the Tier 1 and Tier 2 Leads

Map the account. Who's Tier 1 and Tier 2? Remember:

- Tier 1 leads are original content creators. It's unlikely the account will have a Tier 1, but maybe you'll get lucky!
- Tier 2 leads are engagers. They reshare content, like, and comments. Your account should have a few Tier 2s.

Here's the twist: ignore job titles. Do not filter only by your economic buyers, champions, or ICP leads. Look at the entire account and see who fits into Tier 1 and Tier 2.

Create your shortlist of Tier 1 and Tier 2 leads. Save them as a Sales Navigator lead list or simply write it down somewhere.

Step 2. Warm Up the Relationship

Set a goal for the next 30 days: build credibility and trust with the person.

For Tier 1 leads, use the comment strategies laid out previously. Engage with them in the comments consistently on their posts and work up to the Rule of 3 to send the connection request and transition to DMs.

For Tier 2 leads, review their activity feed. What kinds of posts are they engaging on? Are they a commenter or just a liker? Write out what kinds of content they're interested in.

- Do they follow a specific influencer?
- Do they consistently like a particular kind of post or post topic?
- Do they consistently engage with a particular person?
- Are they only engaging with other people inside their company?
- What seems to be of interest to this person?

Use these insights to craft an engagement strategy based on shared interests. We call this **The Race to Commonality**. The goal is to strike up a conversation based on something you share in common.

Depending upon their engagement activity, it might look like:

- Replying to their comment on an influencer's post
- Sending a DM as a follow-up to them liking a post from an influencer you also follow with a really great question
- Following up from a post from a shared alma mater (it happens) or a conference you both attended

It's hard to list out every. single. possibility. but the best shot here is to follow Sam McKenna's rule: Show Me You Know Me!

Step 3. Transition to DMs for Research & Validation

After warming up the profile, you'll transition into the DMs.

- Use it for research. Ask insightful questions, depending upon the job title.
- Use unsure or "I imagine" statements. Let them prove you wrong and share more.
- If they're not much of a conversationalist, don't worry. You don't need to have the conversation all at once. Loop back to them within the next 30 days with something else that's interesting.
- Use it to validate your triggers and research. This works particularly well if you've targeted a job title in the same department as your buyer's. Use the conversation with the SDR to validate it's the right time to go to the Sales Director. Use the conversation with the Finance Manager to validate it's the right time to go to the CFO.
- You're listening for problem and pain identification – not necessarily solution knowledge. Make it all about the prospect and keep on asking insightful questions!

Step 4. Make the Ask or Layer

Making the Ask

Once you've warmed up the relationship and got a good flow of conversation going, make the ask!



This sounds like... “You know, this makes me think that there might be a way to keep this from happening again. Do you think Nick would be open to chat about it?”

Or... “Yeah, we hear this a lot from SDRs. Problem is, can’t usually be solved without Nick’s buy-in. You think he’d be open to chat about it?”

Or... “Lol just heard this from another Dir of Finance yesterday. Seems like it’s a big problem right now in the industry, but in our experience it can’t get solved without the CFO being involved. Do you think she’d be open to chat about it?”

The goal is to earn the introduction or referral to the key executive. When working across divisions and targeting a Tier 1 or Tier 2 in a different division, you might earn a referral first to someone in the division instead of the key executive. That’s fine too!

Pro tip: if the other profile is also active on LinkedIn, have the person send a group DM with the intro instead of an email. That way you can keep it in-platform.

Layering

Instead of making the direct ask, you can also use your bottom-up approach to layer your outbound. Check out Module 27 to learn more:

 [Module 27: Layering Your Multichannel Approach](#)

Measuring Success

This play is successful when:

- You learn more about the account through your engagement and conversations

- You earn a referral to another key stakeholder inside the account

Next:

 Module 26: Using Social to Route Top-Down



Module 26: Using Social to Route Top-Down

Before You Begin

Using Social to Route Top-Down uses a thorough value hypothesis / business case to reach out to persona's above the power line to immediately jump into an opportunity. This leans heavily on the strength of your business case and the direct observation you made to develop that insight. This mirrors the Spears and DMs Play at a strategic level.

This play works best with the following types of accounts:

- Accounts with at least one Tier 2 profile (above the power line at the VP or C-Suite level) in your Earthquake Map

This play has two results:

- Learning more about what's going on inside the account
- Earning a referral or introduction to mid-management
- Starting an opportunity with momentum by activating a mobilizer

The Play

Step 1. Find the Tier 1 & 2 Leads Above the Power Line

Routing top-down on social requires you to find the profiles who are active on social.



This may sound kind of obvious, but most sellers miss this.

Most Top-Down Plays

This Top-Down Play

Send an InMail to anyone with a profile on the platform

Target based on job title

Hope & pray for response

Choose between a Spear or a Warm-Up to active Tier 1 & 2 profiles

Target based on power line

Get immediate response

The truth is **most top-down plays** look like standard outbound campaigns. Spin up a well-crafted message, find their email (or LinkedIn profile), and send it. Then... sequence them or hope for a response.

Instead, you need to find the Tier 1 & 2 leads who are above the power line.



The **power line** is the level in which the leaders' responsibility shifts from day-to-day activities to the health of the company. They often oversee a department, strategic planning, and budget. Their job titles are frequently Director, VP, and/or CXO.

Take your Earthquake Map and find the Tier 1 and 2 leads who are above the power line. **Remember**, Tier 2 is looking for "signs of life" on the platform and that approaching them directly or indirectly would yield a result.

- The easiest targeting are VPs and CXOs
- Don't discount Director roles! Depending upon the account, it's very possible Directors sit at or above the power line.
- Use your account research or a bottom-up motion to help validate this information

Step 2. Choose Between Spears and Warming Up

Instead of only going direct, choose between using spears and warming up the lead.

Spears: If you have an observation that led to the account being prioritized, create a spear in a personalized connect request to the lead. Review the concept here:

📖 [Module 14: Spears & DM Plays](#)



If you go too high in the organization, they will refer you down. **Don't assume** they're the right person in the enterprise for a meeting.

If you're already connected with the lead, send it as a direct DM.

Warm Ups: If you don't have an observation but have a bulletproof business case, start by warming up the account for the next 30 days to build credibility & trust. Review comments and DM plays below:

📖 [Module 11: Social Listening Comment Play](#)

📖 [Module 14: Spears & DM Plays](#)

The idea here is that if you don't have the observation & insight to create an effective spear but they are Tier 1 or 2, you can use the platform to warm up the lead and earn a meeting through conversation.

Step 3. Use the DMs to Start Discovery & Multi-Thread

Don't wait for your call to have discovery. Even if you've thrown a spear and gotten buy-in, you can use the DMs for discovery. Discovery in the DMs is a bit different though.

Discovery Calls

Buyer expects sales-related questions

Validated pain that needs further investigation (they're on the call!)

Discovery in the DMs

Buyer expects casual conversation that is valuable and helpful

Pain needs to be validated

Call to action = deal progression

Call to action = book a meeting

Up to this point, **you have assumed it's the right time and right person.** For a number of good reasons, too! You've done your homework and you've researched the account. You've created a hypothesis for reaching out.

But unlike an actual discovery call, the goal of Discovery in the DMs is to *validate* your hypothesis. It sits in this “in between” zone of cold outreach and an actual discovery call.

- Your job is to ask increasingly insightful or meaningful questions
- You should readily share resources about *the problem* your buyer is experiencing, not your solution
- Think of yourself as an investigative journalist. You have an idea of what they're experiencing... but are they really experiencing it?

If you've thrown a spear and gotten buy-in, then **obviously you should have a meeting.** Don't wait to get the lead on a call! But if there is resistance or you're warming them up, you can use DMs properly to conduct discovery before you get on a call.

▼ Example Ideas for Discovery in the DMs

Here are some prompts to consider for these DM conversations. Think of these things as actual messages we would send throughout the conversation.

- Most CFOs I talk to are currently struggling with {x}. How are you addressing that?
- I was just talking with another VP of Sales yesterday about how they're managing territory planning coming into '23. She said she was going about it with {y}. How are you doing it?
- It's funny, I was reading this article the other day and passed it by a Director of Ops for his take. He said it was total nonsense. What do you think? {article link}
- Interesting! You know a lot of Series B companies we talk to struggle with {x}. I hear it so often from people in your position especially.

- Lol, yeah — I'm actually struggling with a similar problem in my org. Any pro tips??
- It's interesting you bring this up because I was just talking with a new Director of Finance at another company, and they were struggling with the exact same problem! Why do you think it's such a problem in the industry right now?
- So it's funny you bring that up because we've actually rolled out a solution to that.

And so on.

As you can see, all of these questions are **casual** and **credible** prompts for conversation that tie in your account research and industry knowledge. They allow you to drill down to validate the pain.



Pro Tip: You can also use LinkedIn to multi-thread. Create group DMs between different stakeholders and kickstart a conversation across teams or leaders inside the platform. Works best with active profiles.

Step 4. Ask for the Meeting & Continue Validating Your Business Case

Ask for the meeting! The spear will get you hear faster, but the discovery in the DMs will lead down a path to getting them on the phone.




Your business case or hypothesis for why your company is the right fit for their problem needs continued validation. It doesn't stop with one stakeholder. Keep using each new conversation in the enterprise to validate and refine your overall business case.

Measuring Success

This play is successful when:

- You book a meeting with the mobilizer & begin the discovery process
- You learn more about the account through your engagement and conversations
- You earn a referral to another key stakeholder inside the account (usually mid-management)

Next:

 [Module 27: Layering Your Multichannel Approach](#)



Module 27: Layering Your Multichannel Approach

1. You Will Not Only Use Social to Succeed

In case it hasn't been clear, social for strategic accounts is a starting point for your enterprise prospecting plan.

Not all executives, champions, or stakeholders are active on LinkedIn. Many of them will be Tier 3 profiles that are only nurtured using the inbound plays. You need to leverage other channels.

However, keep this in mind:

- If you're using social to conduct account research to learn more about pains and problems in the industry or for the persona...
- Or you're using social to route bottom-up into the account and learn more about the timing + triggers at the account...

You can take these insights to other channels, particularly email and phone.

2. Build Email Outreach Using Context



Imagine this. A key executive receives an email from you that sounds like:
"Hey Morgan, I was just chatting with your Senior Director of Analytics, Matt. He mentioned Alignd rolled out a new BI tool that isn't properly syncing and it's holding up your Quantum transformation strategy. We have a solution. Worth a chat?"

This email simply isn't possible with generic cold outreach.

- You learned about the transformation strategy from a dynamic prospecting alert from Google Alerts where the executive talked about their new "Quantum" digital transformation strategy as a top priority
- You learned there's a workflow problem from DM'ing with Matt, who you identified as a Tier 2 lead on LinkedIn. You kickstarted the conversation by shooting him a DM, linking a useful blog article you found after seeing a comment he dropped on an influencer. And then you just had a great convo about the state of the industry and what's going on inside his company.
- You identified the right executive from Sales Nav lead lists.

Is this possible with every account on your account list? No. It's fantasy to imagine social as a silver bullet for context- and insight-driven prospecting. But it can be incredibly powerful for the key accounts that make sense.

3. Craft Phone Outreach Using Context




Imagine this. A key executive gets a phone call, but instead of using a classic cold opener, you say something like:
"Hey Morgan, I was just talking with Matt Smith. He said Quantum was on hold because your new BI tool wasn't working correctly. Got a minute?"

No need to bullet point each of the specifics again. This kind of opener simply isn't possible without the kind of research and insight that social provides.

Keep using other channels as leverage points from the kinds of information you have gleaned from social!

Next:

 Module 28: Time-Blocking Engagement



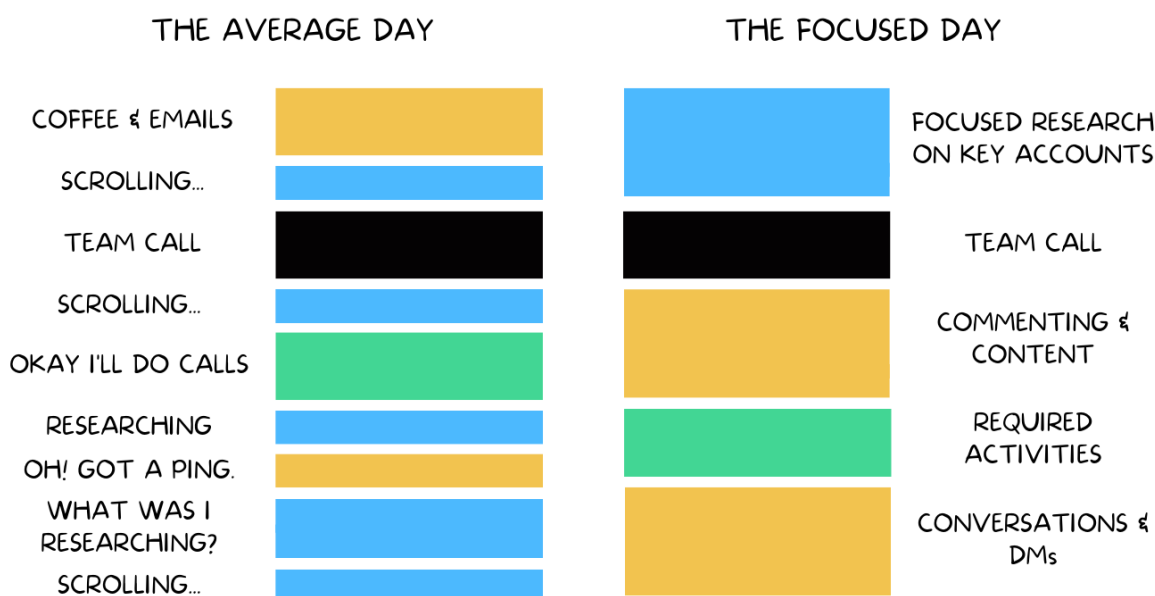
Module 28: Time-Blocking Engagement



Welcome to Daily Workflow. In these modules, we'll be covering how to structure your day and your workflow on social. It's important not to get lost just scrolling the feed, so these modules will help you structure your time!

1. Your Time is Precious

YOU NEED TO TIME BLOCK YOUR SOCIAL SELLING



Social media is designed to be addictive. Getting intentional about your time allows you to hit your objectives without getting distracted.

So how do you do it effectively? We're offering a couple options, depending on how you like to prospect or structure your day.

2. Option 1: Set Up Your Prospecting Power Hour

A prospecting power hour is actually 120 minutes, not 60 minutes. 🦉

Here's how it breaks down:

- Build, clean, and prioritize your list (30 minutes)
- Conduct prospecting on a single channel (60 minutes)
- Review, debrief, and admin work (30 minutes)

You shouldn't run power hours back-to-back either. Instead, do 2 or 3 per day, spread out. That should be enough to sustain momentum.

Building and cleaning your list allows you to only focus on prospecting during the 60 minutes. You should have all the relevant data (emails / phone numbers / social profiles) ready. You should know which order you're calling them or emailing them. Spending this upfront time makes your 60 minutes fly by.

During prospecting, spend the time making the outreach meaningful. Now this is a guide about LinkedIn prospecting, but this structure works for any channel. You might do one prospecting power hour per channel per day.

Don't switch channels though! Context-switching drains your brain and interrupts your workflow. Stick only to one channel per prospecting power hour.

Then once you're done — use those 30 minutes to review what worked and what didn't work. Do the admin slog, update the notes, update the CRM. And debrief on what you'll do differently next time.

3. Option 2: Create 30 Minute Blocks

The prospecting power hour works really well once you have a structure and system to your prospecting. You can identify:

- Which accounts and leads to target
- What influencers to engage with
- Which conversations to continue

When you're just getting started, it may be better to structure your day into 30 minute blocks.

1. 30 Minute Block in the morning (~8am or 9am)
2. 30 Minute Block midday (noon or 1pm)
3. 30 Minute Block at the end of the day (4pm or 5pm)

Here are the rules:

- Only run up to two plays per 30 minute block
- Set a timer. When it dings, exit LinkedIn.
- If you have active conversations, continue them later in the day instead of running over our 30 minute block.



For example, a morning block could be just Influencer Comment and Social Listening Comment Play. Followed by a midday block that is just more Influencer Comments. Then at the end of the day, a Spear & DM Play block.

Don't try to do too much during any one 30 minute block. Stick to a couple core plays. And as the conversations get going in the comments or in the DMs, let them carry throughout the day. **It will make you seem less pushy** by having normal conversations stretched over a few hours or days instead of all at once.

4. Nick's Preferred Schedule

We wanted to share what we do! Nick prefers the following schedule:

- Post content and run influencer comment play (30 minute block, morning)
- Prospecting Power Hour (noon)
- Respond to comments, send connections, and move to DMs (30 minute block, end of day)

"I add social listening when time permits to the end of the day."-

Nick

This is a modified schedule that blends the two options, but is tailored to our daily posting schedule (Content 301) and a smaller, focused prospecting motion.

5. Test What Works For You

In the beginning of our experiments, we spent ~30 minutes in the morning and then 1 hour in the afternoon. Over time, we figured out that 30 minutes, 3x per day worked really well for our schedules. But as we launched our consulting arm and had clients to work with, we've shifted to one Prospecting Power Hour per day and 30 minutes near the end of the day.

That's what works for us. What works for you? Test it out! See how much time you need each day to be successful. Test when that needs to be on your calendar. Don't let the pings distract you from other work.



BONUS. Turn off notifications on your phone. This helps you keep to your time blocks. When you want to engage, you can engage by opening the app or the website. Otherwise, keep those notifications off.

Next:

 [Module 29: Intent Data & Using Triggers](#)



Module 29: Intent Data & Using Triggers

1. What Intent Data is Available?

Intent data can help you structure your priority checklist. It helps determine where you've been finding momentum and you can track whether your warm-up activities are generating any interest.

Without Sales Navigator, you can only do a couple basic intent triggers – the profile view and someone who responds or engages with your comment. You need LinkedIn premium for the full profile view list anyway.

With Sales Navigator, you have all of these options.

Alert preferences

Control what types of alerts you want to receive.

Activity about saved leads

A lead started a position at the same company

A lead shared an update

A lead was mentioned in the news

A lead viewed your profile

A lead started a position at a new company

A lead has engaged with posts from your company

A lead accepted your connection request

Activity about saved accounts

Senior hires at saved accounts

Leaders are researching your company

An account is preparing to grow

An account just announced new funding

Someone at an account viewed your profile

Employees have been moving from a saved account to a new company at an increased rate

An account shared an update

An account just announced a merger or acquisition event

An account was mentioned in the news

An account has accelerated growth

Employees are researching your company

An account has slowed growth

Other

Someone viewed your Smart Link

You have reached the next Coach level

Suggested decision makers

This data lives underneath your Sales Navigator settings. You can turn on and off any of these alerts, including weekly email summaries.

This is why the work you do in the Account and Lead Lists module is **so important**. If you've accurately saved Account Lists and created useful Lead Lists based on narrow criteria, it makes this sort of data incredibly useful.

2. Intent Triggers on LinkedIn



Imagine this. You commented on an influencer's post with a really good comment that got some likes. Previously you had saved a number of accounts into your Qualified TAM list. You know that your ICP follows this influencer. You get a notification that the Director of Finance, an unsaved lead at a saved account, viewed your profile.

In the above example, that Director of Finance is probably a "lurker." She didn't like your comment. She didn't reply to it. She just viewed your profile.

Now you can run one of the plays from the Spears & DMs Play module using this intent data. You're using the intent data to determine which play to use.

Instead of just generically reaching out to people, you're using intent data to drive direct outreach (where it makes sense) to kickstart a conversation.



Imagine another one. A key executive at a large account was just mentioned in the news (notification). You take that news article and tie in an insight by sending a connection request with a really well-formulated Spear.

This is using intent data in a different way. Hyper-targeted and relevant outreach to a key persona. Sounds pretty good!



Another example. You sent a blank connection request 40 days ago to an ICP buyer. It was accepted. You haven't DM'ed them or anything. But you have been posting content. Suddenly, the other day, that ICP buyer viewed your profile.



One last example. You notice that a new ICP buyer viewed your profile, but LinkedIn tells you they found you from search.

As you can see, these basic triggers use some mix of profile views and activity to prompt something more direct.

3. Creating Your Priority Checklist


It's very tempting to be as quick as possible with all of this data. But remember: you're structuring your time in your day. On social, **it's okay to wait a few hours.** People don't log into social to be sold, remember?

Instead, use this data to create a priority checklist. This priority checklist will identify how to prioritize your time in your Prospecting Power Hour or your 30 minute blocks in the day.

- **Priority 1:** Open DMs, ongoing conversations in the comments, and anything you've been tagged in. These are "open conversations" and deserve your highest attention to at least keep the conversation going.
- **Priority 2:** Intent and trigger-based outreach. Start new direct conversations using intent data that demonstrated some level of interest
- **Priority 3:** Influencer comments and social listening. Start new direct/indirect conversations using the plays outlined in Outbound Prospecting. If you've got nothing open right now and no great intent data to use, then start here!

The goal is to **sustain momentum.** You want a blend of new and ongoing conversations. If you find yourself constantly resorting to Priority 3 tasks each day or week, then it's a simple signal that your commenting or DM game needs to improve. It helps us stay honest on what works and what doesn't!

Next:

 Module 30: Daily 30-Minute Routines



Module 30: Daily 30-Minute Routines



Looking for a little structure? Depending on your goal, we've built differently daily routines to help you get started. These are starting points to help structure your time in case you wanted specific steps for 30 minutes of your day.

- If you have less than 500+ connections, start with the “**Network Builder**” routine.
- If you're a sales professional with more than 500+ connections and need to generate results in the next 60 days, start with the “**Meetings Booked**” routine.
- If you're above 500+ connections and you want to make a splash on LinkedIn, start with the “**Digital Road Warrior**” routine.

P.S. The Digital Road Warrior is our name for sellers and professionals who are investing in LinkedIn as a community builder, an engaged peer, and a relationship builder.

Network Builder Routine

The “OG” routine we created that doubled our followers and built a bunch of visibility on the platform in 90 days. We'll break down each step, but this will become your 30-minute daily routine. The rest of the playbook is dedicated to helping you understand this routine & succeed on LinkedIn!

▼ Goal: Build your network with your target audience.

1. Post daily post with content and usable hashtags (max 3).

- After posted, read post.
 - Like post.
 - Comment on post.
2. Send blank connection requests to 20 new people.
 - Use LinkedIn Sales Navigator to ID leads based on target account lists.
 - Filter by Spotlight Filter -- Active on LinkedIn in the past 30 days
 - Filter by Relationship -- Prioritize 2nd Degree Connections
 - If 3rd degree, include a personalized note in connection request.
 3. Send thank you messages to any new connections in the past 24 hours.
 4. Send connection requests to any profile visitors in the past 24 hours who are 2nd or 3rd degree connections.
 - Include "Hey [name]! Thanks for stopping by my profile. Were you looking for anything in particular?" in the connection request.
 5. Withdraw connections from any connection that has not connected within the past 3 weeks.
 6. Scroll through feed or use Sales Navigator to prioritize leads and comment on at least 5 posts with a valuable, insightful comment.

Meetings Booked Routine

Our accelerated routine to leverage direct and indirect methods of engagement to create meetings on LinkedIn.

▼ Goal: Book more meetings off of LinkedIn.

1. Engage with 5-10 key influencers in your industry.
 - a. Comment on their post with a valuable insight or question.
 - b. Find ICP personas in the comments and reply to their comment with your own.

2. Search for key terms and engage in social listening.
 - a. Use a capture doc to copy/paste interesting questions and insights about your audience.
 - b. Review capture doc for patterns & insights into your audience.
3. Send connection requests to valuable and engaged prospects.
 - a. Obey the Rule of 3.
 - b. Send connection requests to 10-20 new people leveraging Connection Strategies (if applicable).
4. Follow up with any new connections in the past 24 hours.
 - a. Send a video message from your phone.
 - b. Or, send a thank you message with a prompt for engagement.
5. Shift appropriate comment conversations to DMs.
 - a. Guide the conversation using qualifying/discovery questions to qualify the prospect for a meeting.
 - b. Ask for the meeting, if appropriate.

Digital Road Warrior Routine

Our comprehensive routine we use every day to build our personal brand and book meetings on LinkedIn. Chances are, this might take a little longer than 30-minutes when you first roll it out. But once you get into a rhythm, this will become your 30-minute daily routine

▼ Goal: Build your audience and book meetings off of LinkedIn.

1. Post daily post with content and usable hashtags (max 3).
 - a. After posted, read post.
 - b. Like post.
 - c. Comment on post.

2. Send connection requests to 20 new people.
 - a. Use LinkedIn Sales Navigator to ID leads based on target account lists.
 - b. Filter by Spotlight Filter -- Active on LinkedIn in the past 30 days
 - c. Filter by Relationship -- Prioritize 2nd Degree Connections
 - d. If 3rd degree, include a personalized note in connection request.
3. Engage with 5-10 key influencers in your industry.
 - a. Comment on their post with a valuable insight or question (if appropriate).
 - b. Find ICP personas in the comments and reply to their comment with your own.
4. Search for key terms and engage in social listening.
 - a. Use a capture doc to copy/paste interesting questions and insights about your audience.
 - b. Review capture doc for patterns & insights into your audience.
5. Follow up with any new connections in the past 24 hours.
 - a. Send a video message from your phone.
 - b. Or, send a thank you message with a prompt for engagement.
6. Shift appropriate comment conversations to DMs.
 - a. Guide the conversation using qualifying/discovery questions to qualify the prospect for a meeting.
 - b. Ask for the meeting, if appropriate.
7. Withdraw connections from any connection that has not connected within the past 3 weeks.

Build Your Own Routine

If you viewed the above routines, you'll see that most of the plays inside are fairly basic. That's because they're starting points!

Work on testing out adding new Outbound Prospecting plays or spending more time on Building Inbound as a part of your time. Build your own routine by testing out what works!

Next:

 Module 31: Metrics of Success



Module 31: Metrics of Success

1. Select In-Platform Metrics of Success

This is **the most difficult** part of LinkedIn.

Each individual post, connection request, comment, and conversation isn't really going to "move the needle" (except when a post does *exceptionally* well). It's the gradual buildup, the gradual stacking of everything, that is really going to lead to long-term performance.

Metrics for **individual success** should be judged holistically, but we believe it's best to start with what's happening "in-platform." What's actually noticeable on LinkedIn? And, are you headed in the right direction?



In-Platform Metrics

Here's the simple list we pay attention to:

- Profile views
- Ratio of sent vs. accepted connection requests
- 30-day trend on content engagement
- Inbound connection requests per week
- # of meaningful conversations per week
- # of booked meetings per week

Profile views are trackable from your profile with LinkedIn Premium or a Sales Navigator license.

Ratio of sent vs. accepted connection requests needs to be manually tracked if you want to know this ratio as described in [Building Your Profile Funnel](#) and [Building Your Network](#).

30-day trend on content engagement can be done manually or you can use an analytics tool that integrated with LinkedIn.

Inbound connection requests per week should be done manually. This is a "gut check" figure and if you're using outbound-for-inbound (described here) then it's especially important you're getting inbound from target ICP profiles.

of meaningful conversations per week is a “gut check” metric. When scrolling through your DM inbox, how many great conversations did you have this week?

of booked meetings per week is fairly straightforward.

These individual metrics are starting points for understanding whether you’re building momentum on LinkedIn.



Metrics should **always** be judged in 30 to 60 day increments. Do not... DO NOT... measure daily. You should be looking at trend lines, not the specific data points.

2. Select Your Off-Platform Metrics

These are likely metrics for **company success**. They are less related to the individual profile but are just as important for measuring the success of social.

If you’re the lone warrior at your company adopting social, you can ignore this section. But if you have manager or team or company support, the company should be considering broader metrics of success from social.



Off-Platform Metrics

There are lots of options to explore. Here are the basics:

- Attributable website traffic (referred by source)
- Self-reported attribution (form fill on demo request form)
- ABM software that tracks lead engagement on website
- \$ saved by impressions/views from content over 90 days
- \$ saved by clicks from content over 90 days
- Pipeline generated
- Closed-won deals generated

As you can see, some of these are traditional “sales” metrics and some are traditional “marketing” metrics. Given that social contributes to both, this is intentional. Better visibility from running Content 201 or Content 301 can save marketing thousands of dollars on ads. More engagement can drive inbound leads via the website with self-reported attribution.

Dreamdata logged an interesting story with Foundation about how their social selling program contributed to overall company success.

How Dreamdata's LinkedIn Strategy Attracts Qualified Leads Via Employee Advocacy

Ever wondered what the ROI of social selling on LinkedIn is? You'll see the numbers shortly. But first, Dreamdata. So, on February 23, 2022, I was diving deep into a case study on a marketing website when I stumbled again on Dreamdata.

 <https://foundationinc.co/lab/dreamdata-linkedin-strategy/>



These “off-platform” metrics speak to broader sales and marketing goals for the organization. You’re simply mapping those goals back to the individual seller.

3. Log It in Your CRM

One of the questions we’re often asked is whether to track leads inside your CRM and how to accomplish that.

Our recommendation is **don’t add anyone to your CRM unless you’ve had a meeting with them**. Everything else is just social engagement.

This keeps your CRM list clean, correctly identifies leads as interested parties, and allows seamless integration with the rest of your sales tech stack.

If you’re interested in tracking leads who haven’t booked meetings, use Sales Navigator. It allows you to create native lead lists & account lists to track their profile shares, engagement trends, etc. It also keeps your CRM clean.

This way, you have a big pool of prospects who you’re regularly engaging with via Sales Navigator and the LinkedIn platform + a small pool of (qualified) leads who are in your CRM.

4. Keep On It for 90 days.


The biggest not-well-kept secret of social selling is this: **It takes time**.

Direct outreach programs like cold calling and cold emailing generate immediate feedback. You know how well they work within a few days or weeks based on your sequence.

Social selling doesn't work like direct outreach. Your mental model has to shift from immediate feedback to long-term trends. As a rule of thumb, we recommend sticking with it for 90 days. Keep running experiments, try new kinds of content or comments, update your profile's headline, connect with new people, etc. In 90 days time, you'll have a great sense of "what worked" and "what definitely didn't work."

The above metrics of success are guardrails for your success. Don't worry about the day-to-day success, just keep on it over time!

Next:

 [Module 32: Use PROACTIVE](#)



Module 32: Use PROACTIVE



You have lifetime access to this playbook. Looking for improvements? Make sure to [give us feedback](#).

You've made it. You're at the end. 😊

Here's our short-hand framework to remember a summary of what we covered. It's called PROACTIVE.

- **Profile.** Your profile is the starting point for everything. It's your credibility calling card. All of your social activity drives back to your profile. Make sure it passes the 3-second test, has featured links, and tells a story in your About section.
- **Research.** Use social listening and comments sections to identify the primary pains and problems of your ICP persona. Use those tools plus Sales Navigator and other data tools to create account and ICP lead lists.
- **Observation.** What is the observation (based in data or industry context) that prompted you to consider the account a qualified target? This is how you create your Qualified TAM list.
- **Audience.** Your audience is the total aggregate of all the leads at all of the accounts you are trying to target. No need to get distracted by content creation or personal branding: your job is to nurture, warm-up, and educate this audience.
- **Content.** Create content as a 1-to-many nurture sequence based on validated pains and problems you have discovered through your research. Use content to reach lurker accounts and prompt targeted inbound leads.
- **Triggers.** As you move into direct outreach, use triggers to identify hot leads and answer "why now" vs. 60 days from now. You will likely use multiple triggers for different accounts, leads, or ICP personas.

- **Insights.** What are the things your prospect needs to know about the problem they're experiencing? This insight is related to your value proposition and will be infused in your messaging. Use these insights in your comments and DMs.
- **Validation.** Use comments, connection requests, conversations in the DMs, and spears to validate your assumptions about your audience. Everything up to this point is just "theory." Test it in-market using the outbound and inbound plays to learn what works for your specific audience.
- **Enable.** Enable your buyers to buy easily. Don't force the discovery call. Keep the conversation casual. Obey Vampire Sales.

Good luck! And as always, we're available on LinkedIn if you have questions. DM [Morgan here](#), DM [Nicholas here](#).

Looking for team training? Alignd, our consulting arm, offers interactive workshops that trains sales teams on social prospecting. [Click here to learn more.](#)

Next:

 [Seller's Guide to LinkedIn](#)