



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](#)