



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](#)