

The Social Sales Playbook

# Winning with Social Sales in B2B.

Inspired and contributed by

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**Blueconomics.**  
Empowering B2B Relationships.

“Sales is about people.  
And social sales is about engaging the right people  
at the right time in order to win.”

Andreas Uthmann, Founder and Managing Partner, Blueconomics Business Solutions

# About

This playbook is designed for the visionaries and game changers who want to win B2B opportunities through social sales.

It is targeted to sales, account, marketing and business managers who believe that not just the best products, services or solutions, but the teams win who leverage and enhance their sales network best.

The objective is to help sales and business executives to exceed their sales targets.

# Addressing Social Sales Challenges

Driven by globalization and latest information technologies, the world has become more competitive and integrated than ever before. Value chains are being transformed into value networks. Hierarchies have turned into collaborative communities. And virtual teamwork further accelerates distributed decision-making.

These changes provide great business opportunities for small, medium and large businesses alike. On the other hand, it also means we need to manage our sales activities more effectively in order to capitalize on those opportunities. The more complex the sales network, the higher the risk talking to the wrong audience.

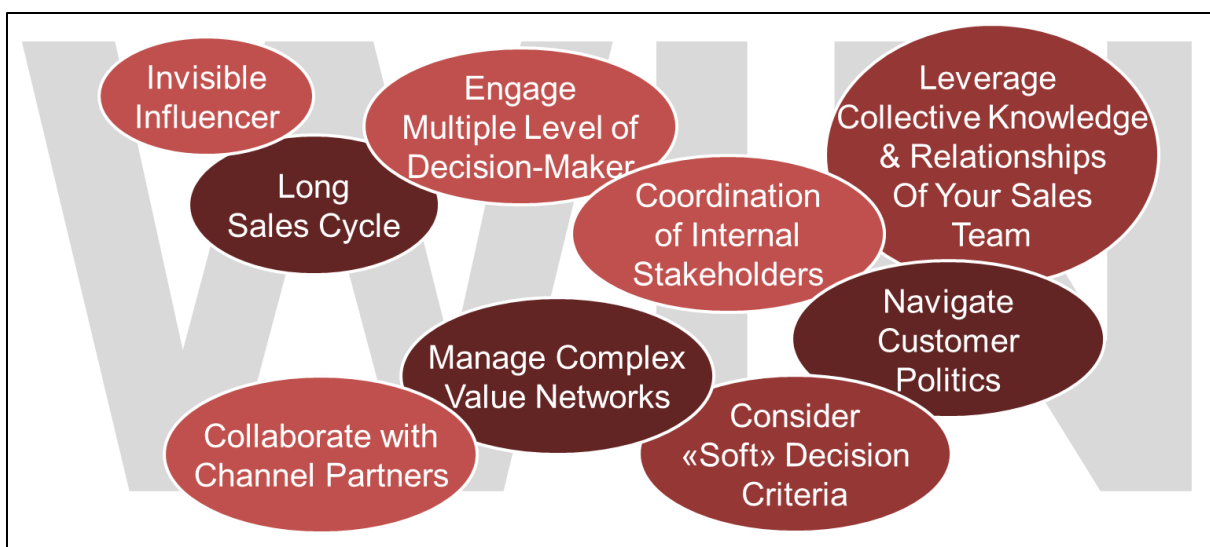


Figure2: Social Sales Challenges

Social sales provides an analytic, structured approach to relationship-driven and collaborative decision-making. By actively managing sales networks, we can reduce the risk of failure and avoid unwanted surprises by incorporating social factors.

Improved internal and external collaboration will yield different benefits. Potentially, we will save costs by investing into the right opportunities or shorten the sales cycle, but most importantly, our win rate will grow.

Assuming, You could increase win rate by just 5%, what would it mean to the bottom line of Your company?

# What is “Social Sales”?

We all remember situations where we had to find ourselves talking to the wrong audience. And if we lost, we always had good excuses like price, features or our administrative workload. But maybe there is potential to do better by focusing on what is really important: The people and social relationships behind the deal.

Social sales is a selling approach leveraging the power of relationships, collaboration and social networks throughout the customers buying cycle to increase sales effectiveness.

In brief, social sales addresses the need to

1. Identify influencers and decision-makers
2. Build new and leverage existing relationships
3. Define effective, relationship-driven sales strategies and action.

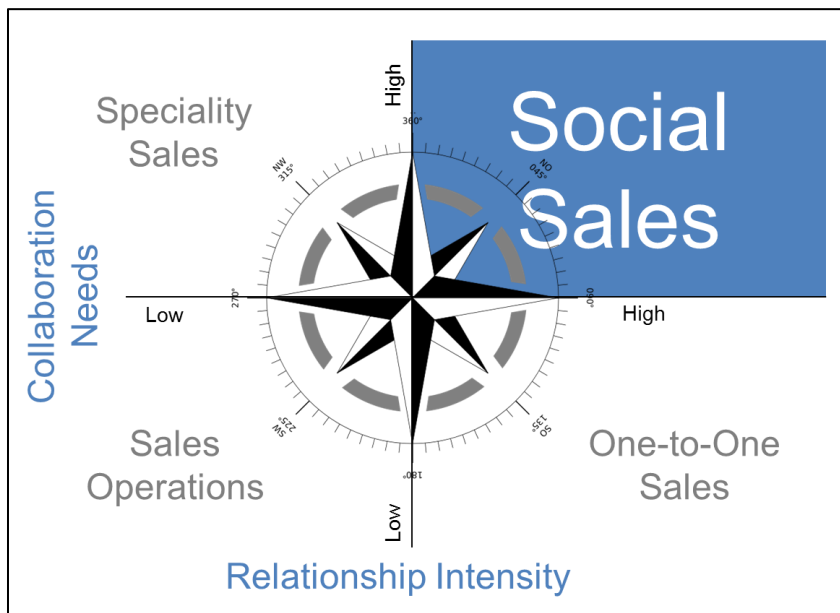


Figure1: Social Sales Compass (B2B)

## Managing Complexity

In general, the more complex the sales process and the more people are involved in decision-making, the more important it is to leverage the social capital of our teams, our partners and our customers to minimize risks. In other words, the higher the relationship intensity and collaboration needs of a sales opportunity, the higher the value of applying social sales methods.

## Sales is about people.

It doesn't matter whether we are selling a product frame agreement, a service project or a technical solution. The best business proposal is useless if it doesn't relate to the needs and wants of our audience. At the end, we have to identify, engage and manage the right influencers and decision-makers effectively. In fact, sales has always been social. Sales is about people. And social sales is about engaging the right people at the right time in order to win. We see 3 steps to make social sales happen.

## Step1: Social Sales Mapping

Social sales is about networks and relationships. Mapping our key influencers and decision-makers into a social network graph, is the first and most important step of any social sales engagement. Often, the visualization alone yields a long list of improvements and potential actions.

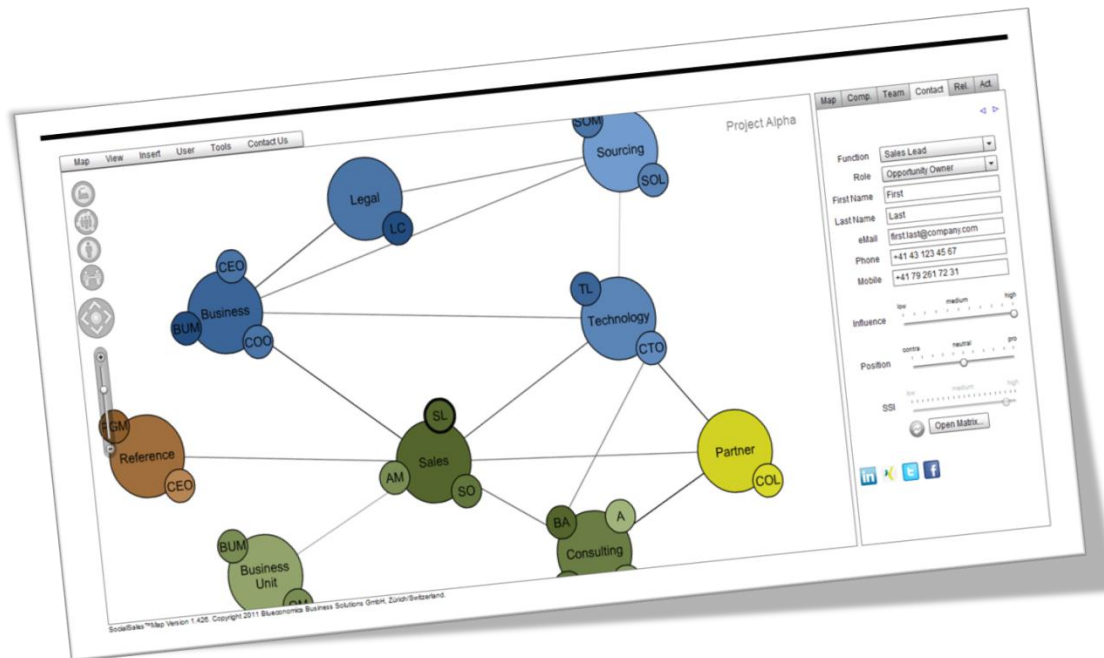


Figure4: SocialSalesMap™ Example

Like in classical buying center analysis, it might be very helpful to take an organization chart to start the exercise. However, often decisions are being made in virtual teams with representatives from different departments or units, so we might be better off with a network map. Secondly, we also need to add our own team, include partners, external influencers (e.g. consultants), other customers or additional contacts to the map.

But a network does not only consist of contacts and their relationships. It might be very helpful to group people with common interests or objectives into teams. This will keep the network manageable while providing better overview.

Finally, a network map should be a “living” object and its content should be established and updated in iterative circles in order to maximize the outcome.

# Step2: Analyzing Sales Networks

It's great to identify the key influencers and decision-makers and their relationships in order to manage them better. But, based on the information available, who is the most important contact for us to work with? Where should we focus our resources? Which contacts to engage first?

Applying social network analysis (SNA) to complex B2B sales can provide effective answers to some of those questions. Assuming, a first estimate of the influence of a contact is available, we can use SNA algorithms to calculate the overall importance of any contact within a sales network, i.e. the so-called SocialSalesIndex™ (SSI).



Figure5: SocialSalesIndex™ Drivers

The underlying logic is simple. The more relationships someone has, the higher her indirect influence. The more intense those relationships, the better. And the more influence my team and my direct relationships have, the higher my own importance. Following this logic, and using advanced SNA algorithm (like Eigenvector Centrality), we receive an importance level for every network contact based on network topology, her relationships, her direct and indirect influence.

The higher the SocialSalesIndex™, the more important the contact for the sales decision. Hence the SocialSalesIndex™ allows ranking all direct and indirect contacts in order to set the right priorities and focus our resources on the most effective targets.

# Assessing Sales Contacts

Segmenting contacts into actionable groups is a critical success factor in order to allocate the right resources and activities. We believe that pro/contra position as well as importance, measured in terms of SocialSalesIndex™, should be the most important segmentation criteria for a social sales matrix. As a result, we can segment the entire sales network into 4 contact cluster.

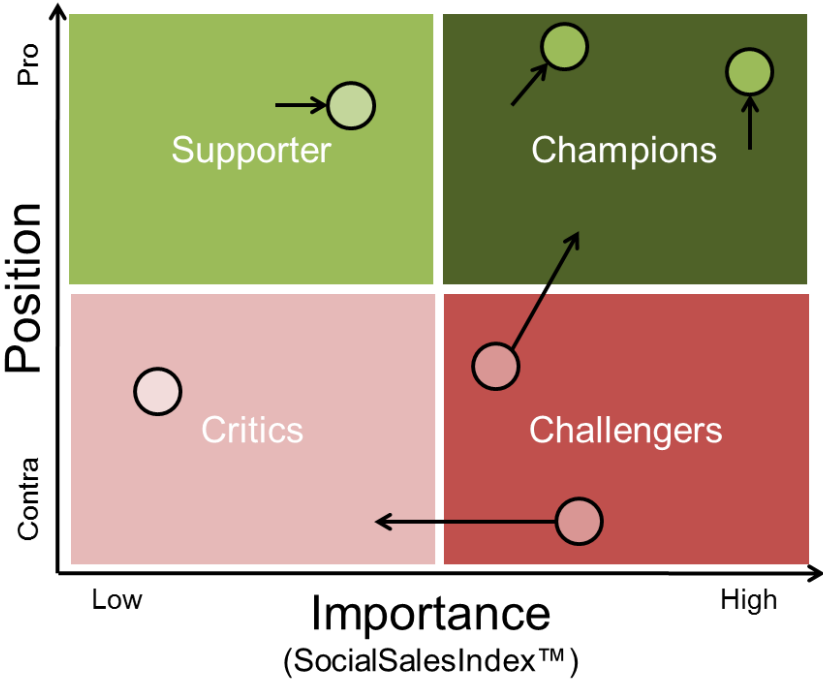


Figure6: Social Sales Matrix

### Challengers

In any sales process, it's very critical to understand who our most important challengers are. We need to focus our resources here to turn them into champions by better addressing their needs, or, alternatively, try to neutralize their influence through bypassing or targeting their environment directly.

### Critics

We can try to keep the number of "Critics" low with reasonable effort. In the mid-term, we need to improve the position of "Critics" through better sales, marketing and service engagement. However, since importance of critics for the specific opportunity is limited, a hunter would focus her efforts on other decision-makers first.

### Champions

These are our most important promoters. If we manage to move all decision-makers here, we win.

### Supporter

This group can be used very well for a positive "Grundrauschen", even if their direct power is limited.



## Step3: Applying Social Sales Strategies

The main goal of mapping and analyzing social sales networks is to define the most effective sales strategy and action plan.

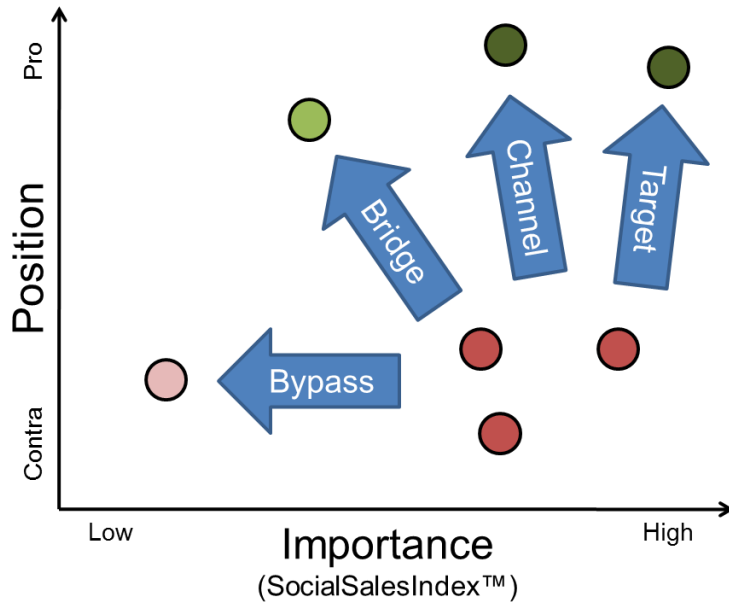


Figure7: Social Sales Strategies

There are four strategic options available.

1. **Targeting**  
Where relationships to key influencers or decision-makers exist, we can target and engage them directly. For example, we might want to use targeting to turn a critical challenger into a friendly-minded champion.
2. **Channeling**  
We can use bridges respectively indirect relationships to channel our message. Sometimes bridges might act as trusted advisor to the target audience, making it potentially more effective than direct targeting in such cases.
3. **Bridging**  
In case no direct relationships exist yet, we can establish bridges to either introduce ourselves to the target or for future channeling.
4. **Bypassing**  
In order to minimize dependency on existing bridges or gatekeepers, we might want to neutralize them by establishing direct relationships or building up alternative paths.

### Every Sales Network is Different

In reality, the most effective action plan will always incorporate a mix of different social sales strategies. Every sales project is different, so are the relationship networks. Important is to understand the strategic options and being able to apply them most effectively.

# Winning with Social CRM

While most CRM providers think about “Social CRM” in the context of Social Media Monitoring or Social Media Marketing, applying social sales in B2B will require a different approach, as outlined above. As a consequence, leading CRM providers have started integrating SocialSalesMap™ functionality into their solutions to enable customers to benefit from social sales.

Traditional CRM	SocialSalesMap™
Transparency	Collaboration
Processes	People
Reporting	Actions
Efficiency	Effectiveness
Contacts & Organizations	Teams & Networks
Functionality	User Experience
Transactions	Social Relationships
Tables & Forms	Interactive Maps
Software Packages	Online Services
Office	Mobile
Setting targets	Achieving targets

Figure8: Traditional CRM versus Social Sales

Social sales can be applied independently of existing sales processes, information or tools. It does not require extensive training nor support. Instead, it provides a powerful, yet easy-to-use framework for managing strategic sales opportunities. It is designed to facilitate sales collaboration and increase sales effectiveness. To help sales teams exceeding their targets.

# Social Sales Dictionary

## Bridge

Person providing indirect access to other teams and/or persons via existing relationships. Can be used for introductions or for channeling messages.

## Gatekeeper

Person who provides exclusive access to disconnected teams or persons. Can be either bypassed or used as channel.

## Hub

Central team or person connected to multiple other teams and/or persons. Good subjects for effective targeting due to strong indirect influence.

## Relationship

Interdependent social connection (tie, edge, link) between teams and/or persons. Represents the flow of information and communication in a network.

## Satellites

Teams or persons linked to a central hub. Can be used to positively influence decisions.

## Social Sales Networks

Set of persons, teams and their relationships.

## Social Network Analysis

Study of relationship structures among social entities (teams, persons) to assess social influence or most important persons.

## SocialSalesIndex™

Indicator of social influence of teams and/or persons in a sales network based on network topology and weighted relationships (Eigenvector Centrality). Can be used for ranking key decision makers in terms of importance.

## SocialSalesMap™

Graphical representation of a social sales network consisting of teams, persons and their relationships. Enables to identify, engage and manage key influencers and decision-makers effectively.

## Team

Number of persons grouped together via common objectives, formally or informally. Can be addressed together or individually.



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