

# SOCIAL PROSPECTING WORKBOOK: HOW TO USE SOCIAL MEDIA TO FIND NEW LEADS



# WHAT IS SOCIAL PROSPECTING?



As a modern marketer, you may already understand the importance of social media as part of your marketing strategy. With more than 2.85 billion monthly active users on Facebook, 1 billion interactions on LinkedIn per month and 200 million monthly active users on Twitter, smart marketers know there's more potential than ever to use social platforms to get their name out there, share valuable content, and attract more people back to their website.

Smart marketers practice social prospecting – the art of scouring the social web, identifying potential prospects for your business, and engaging them to draw them to your site and get those potential prospects to your sales team. You've already got fans and followers in your social networks. Now it's time to reach further.



# ABOUT THIS WORKBOOK



This social prospecting workbook will teach you the fundamentals of how to listen to social media conversations in order to generate leads for your business. Beyond monitoring keywords, it's about engaging with people who have challenges that your product or service could solve.

We've identified the quickest way to find potential prospects on Twitter, Facebook, LinkedIn, and Pinterest. We hope you can use the worksheets included here to help you get started with social prospecting.

## Every worksheet includes:

- Short preparatory work to make the actual prospecting easy
- Visual instructions on how and where to find prospects
- Pro tips that will help you get the best results
- Prescriptions (Marketing Rx) for success
- Exercises for follow-up prospecting



# GETTING STARTED



To get started with any one of these worksheets, you'll need:

- A social profile for that network
- Keyword phrases that people use to search for your company, product or industry
- Content related to those keyword phrases (blog posts, case studies, e-books, etc.)

## What you're looking for

No matter which social network you're searching on, you'll be looking for users that you want to connect with. Here are some of the characteristics of a good social prospect:

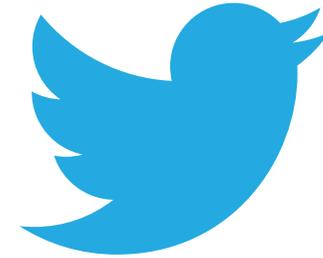
- People who have problems or ask questions
- People who use the social network consistently; people who have conversations with other users.
- People who tweet/post about their industry; who share content; who share, re-post or retweet other people's content.
- People who work at companies you want to do business with.
- People who work at companies in industries you want to work in.
- People with certain titles or roles in a company (specifically on LinkedIn; people don't always disclose titles/roles in other social profiles).

**ProTip:** It's best if you're somewhat active on the social platform that you're using to prospect. The same way you're looking for people who are active and have established themselves in their industry using a social network, you want them to view you similarly. Being new is okay, but get posting/tweeting so you can build a presence on the platform.



# TWITTER

## 1) PREP:



Write down the top three keywords or phrases that people use to find you on search.

- 1
- 2
- 3

**ProTip:** Remember, shorter keyword phrases work better for Twitter.

Write down three pieces of content from your marketing arsenal that are related to the search results of your keyword phrases. You'll use this content to draw prospects back to your website.

- 1
- 2
- 3



## 2) GET STARTED:

Head on over to Twitter and type in your keywords or phrases using any combination you would like.



- People use the hashtag symbol (pound sign, if you're really old-school!) # before a relevant keyword or phrase in their Tweet to categorize those Tweets and help them show more easily in Twitter Search.
- Don't use any spaces between words when using hashtags.
- Punctuation marks ( , . ; ' ? ! etc.) will end your hashtag wherever punctuation occurs.
- Hashtags will not work with letters or numbers in front of the # symbol. The # symbol must have a space directly in front of it in order for it to show correctly in searches.
- If you write #1 or #123 the hashtag will not be hyperlinked and is therefore not searchable. However, if you include letters following the numbers in the hashtag, for example, #123go, then the hashtag will work correctly.
- Clicking on a hashtagged word in any message shows you all other Tweets marked with that keyword.
- Hashtags can occur anywhere in the Tweet – at the beginning, middle, or end. (Best practices call for no more than two hashtags per tweet.)
- Hashtagged words that become very popular can become Trending Topics.

**ProTip:** Mix and match searching your keyword phrases with a hashtag and without a hashtag for the most diverse results. Hashtags were created organically by Twitter users as a way to categorize messages. They are an effective way to filter Twitter's content to a single topic, event or concept.

When viewing search results, choose to view Top, Latest, People, Photos or Videos using the links at the top of the results.



Use the three dots icon to access search settings and “Advanced search” options. Using advanced search, you can refine your search results by using any combination of the fields below:

### Words

Tweets containing all words in any position  
(“Twitter” and “search”)

Tweets containing exact phrases  
(“Twitter search”)

Tweets containing any of the words  
(“Twitter” or “search”)

Tweets excluding specific words  
(“Twitter” but not “search”)

Tweets with a specific hashtag (#twitter)

Tweets in a specific language  
(written in English)

### Accounts

Tweets from a specific account  
(Tweeted by “@TwitterComms”)

Tweets sent as replies to a specific  
account  
(in reply to “@TwitterComms”)

Tweets that mention a specific account  
(Tweet includes “@TwitterComms”)

### Engagement

Tweets with a minimum number of replies,  
likes or retweets  
(Tweets with at least 280 replies)

### Dates

Tweets sent before a specific date, after  
a specific date or within a date range

Use the calendar drop-down to select a  
“from” date, “to” date or both

Search for Tweets from any date since  
the first public Tweet

By combining fields in advanced search, you can tailor your search results in a powerful way. For example, you can search for Tweets containing “New Years” but excluding “Resolution” between December 30, 2020 and January 2, 2021. Or you can search for Tweets in English with the hashtag “#Olympics” sent from Japan in July 2021.

## NOTES:

Based on their profiles, identify five Twitter users that could be potential leads for your business. Then follow them!

- 1
- 2
- 3
- 4
- 5

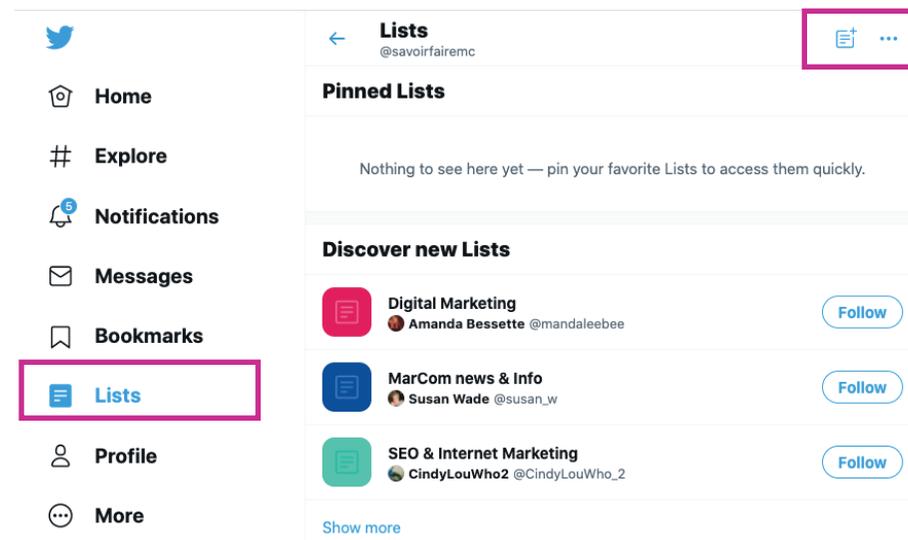
## 3) TAKE ACTION:

Start engaging with potential prospects by:

- Retweeting some of the content they've shared on Twitter, especially if what they shared is relevant to your industry (remember, these will appear to your followers).
- Responding to any questions they may have tweeted to establish thought leadership.
- Share your content, positioning it as valuable for certain people/challenges/industries.

## MARKETING R

Create a Twitter list of all the potential prospects you've identified to make checking in on them easy for you. Make sure to name your list something that is relevant to your industry. *(You do this from your own Twitter profile page.)*



Important Note: Twitter lists can be set as public or private. If you make a public list, name it something you don't mind others seeing (so do NOT name a public list "My Prospects" for instance – name it, "[Your Industry] Leaders" or something equally complimentary.) When you add someone to a public list, they get an alert the same way they get alerts for retweets, favorites, and @-mentions. (If you'd rather create a private list, feel free to name it whatever is best for your Twitter usage.)

## [FOLLOW-UP EXERCISE]

**Spend 30 minutes a week:**

- Repeating this exercise and adding more prospects to your list (10 mins)
- Retweeting relevant content for your industry from this Twitter list (5 mins)
- Favoriting tweets from potential prospects from this Twitter list (5 mins)
- Engaging with potential prospects by posting or answering questions from your Twitter list (5 mins)
- Posting your own tweets, whether your own thoughts/insights or share relevant industry content (5 mins)



# LINKED IN

## 1) PREP:

Write down the top three keyword phrases that people use to find you on search.

- 1
- 2
- 3

**ProTip:** Remember, keywords that work well on LinkedIn are more business-focused. People typically use LinkedIn with their professional “hats” on.

Write down three pieces of content from your marketing arsenal that are related to the search results of your keyword phrases. You'll be able to use this content to draw prospects back to your website.

- 1
- 2
- 3



## 2) GET STARTED:

Sign into LinkedIn, and visit this [URL](#).

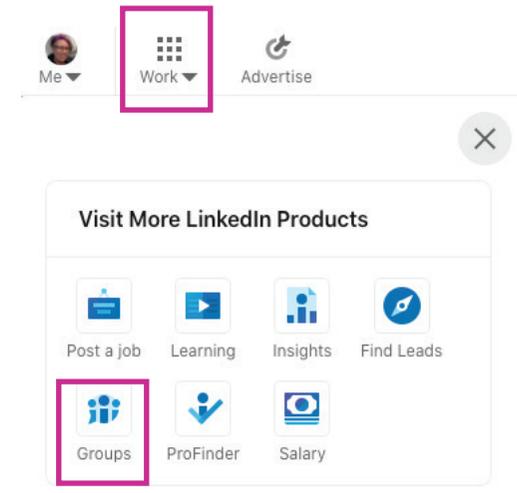
**If you want to start conversations with specific companies**, search for the company using the top search bar. From the company page, view the employee list. Select an employee to view his/her profile. Scroll to the bottom to find any groups to which he/she might belong.

### NOTES:

Based on the group's description (and a quick scan), identify five LinkedIn Groups that could have potential prospects for your business and join them.

- 1
- 2
- 3
- 4
- 5

**Don't forget:** Some groups are private, so you may need to wait until you are accepted into the group to complete the worksheet.



**ProTip:** You can narrow your search results in the menu on the left by choosing what your relationship is to members of the groups, for instance if you want a category of “Open” or “Members only,” or if you want search results for groups that are in one or multiple Languages.

### 3) TAKE ACTION:

Now it's time to get involved! You will want to start by reading through the group posts and answering any questions you can, based on your background and expertise. They don't have to be specifically about your product or service - just something you can demonstrate expertise on. You may also want to participate in some of the conversations. Finally, you may share the pieces of content you identified earlier, as long as they're relevant and you think the group would benefit from them. Beware of joining a group and immediately sharing your own content. Regular members will suss out pretty quickly that you're only there for your benefit. Start engaging with potential prospects by:

- “Liking” content that others are sharing in the group.
- Joining in on conversations in the group where you can add value. If you have a piece of content that is directly applicable to the question, you may share it, but don't be overtly “salesy.” You're here to participate, not to sell.
- Answering questions and offering insights and information, much like you would at a cocktail party.
- Sharing your own content and posting your own questions to the group.
- Engaging with those people who respond to your content or questions.

**ProTip:** When you find a particular post within the group you want to monitor, you can choose to “Follow Discussion” so you'll be updated when content for that post is added.

Use your LinkedIn newsfeed by interacting with posts, sharing relevant articles and adding professional success stories. LinkedIn influencers posting more than 50 times per month average about 26 engagements per post. But those who post 10 to 30 times monthly see more engagement. Remain professional and add quality content.

When researching companies, look at what their employees post. Look for opportunities to share their content and mention potential prospects.

Promoting someone's professional skills is a great way to get noticed. Find people you've collaborated with and promote their relevant skills. Endorsing skills on your connections' profiles builds goodwill. This may open the door to ask for referrals in the future.

Use LinkedIn's recommendations to build relationships and find people connected to your network. It's important to establish a relationship before you contact someone directly.

LinkedIn's Sales Navigator lets you search for leads or accounts. There are advanced search filters that help you find additional leads for your products and services.

## [FOLLOW-UP EXERCISE]

### **Spend 30 minutes a week:**

- Reviewing the content in the groups you've joined (10 mins)
- Commenting and adding value to posts from others in the group (5 mins)
- Share one piece of organic content to the groups you've joined (5 mins)
- Look at LinkedIn's recommendations and add suggested connections (5 minutes)
- Do a Sales Navigator search to find potential leads (5 minutes)

# FACEBOOK

## 1) PREP:

Write down the top three keyword phrases that people use to find you on search.

- 1
- 2
- 3

Write down three pieces of content from your marketing arsenal that are related to the search results of your keyword phrases. You'll be able to use this content to draw prospects back to your website.

- 1
- 2
- 3

Write down 3 long-tail search queries that are created from those keywords. You may include industry, geography or any other qualifier for your service/product/company.

- 1
- 2
- 3



Definition: Long-tail keywords are search queries composed of 3 or more words that are more specific than the keyword alone.  
 Example: "HubSpot" (short-tail) vs. "inbound marketing software" (long-tail)



## 2) GET STARTED:

Sign into Facebook and type your long-tail search queries into Graph Search and see what comes up.

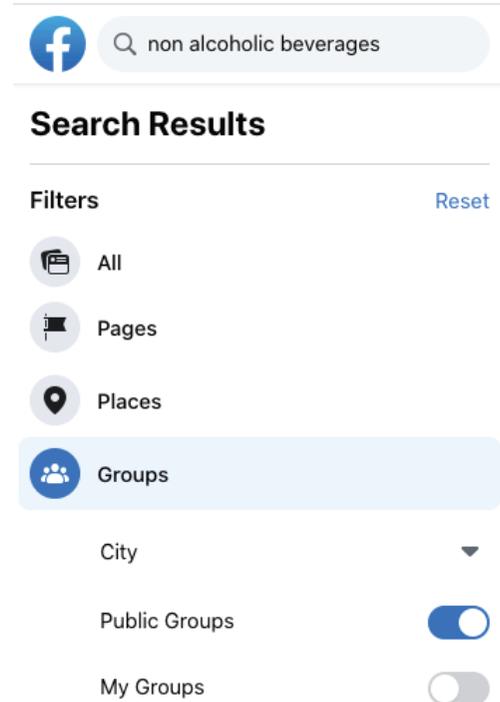
### NOTES:

Identify three pages that could potentially have leads for you and “Like” them.

- 1
- 2
- 3

Identify three groups you could join that prospects could potentially be in & join them.

- 1
- 2
- 3



**ProTip:** If you're not familiar with Graph Search, spend a few minutes and take the tour. Worth it! You can find that tour here: <https://www.facebook.com/about/graphsearch>

### 3) TAKE ACTION:

Now it's time to start sharing the pieces of content you identified earlier. Start engaging with potential prospects by:

- Joining in on conversations on pages and groups where you can add value with the content you identified earlier.
- “Liking” relevant content on pages that is relevant to your industry.
- Answering questions on pages and in groups wherever you can lend your expertise and insight.
- Asking questions on pages and groups to engage others.
- Engaging with anyone who responds to your questions or answers.

## MARKETING &

To easily keep up with the updates of pages, groups and people you follow, create interest lists. Interest lists help you organize and segment content you want to read about or might want to respond to. You can create your own list or follow other people's lists. For your own list, add those pages and groups you identified as having potential leads. Your lists will appear in the Interests section of your bookmarks. Clicking a list's name allows you to see all the recent posts and activity from the Pages and people featured in the list. [For more on interest lists, see Facebook's help center https://www.facebook.com/help/interest-lists](https://www.facebook.com/help/interest-lists)

## [FOLLOW-UP EXERCISE]

**Spend 20 minutes a week:**

- Scanning the pages you've “liked” for any opportunity to join the conversation (5 mins)
- Searching the groups you've joined for opportunities to offer help or content (5 mins)
- Engaging with people from the groups or pages directly on their profiles (if possible) (5 mins)
- Share one piece of organic content to the groups or pages you've joined (5 mins)



# PINTEREST

## 1) PREP:

Write down the top three keyword phrases that people use to find you on search.

- 1
- 2
- 3

Write down three pieces of content from your marketing arsenal that are related to the search results of your keyword phrases. For Pinterest, these may be web pages, blog posts, or any other place online where you can link to.

- 1
- 2
- 3



## 2) GET STARTED:

Go to Pinterest search and type in the keyword phrases you noted above. Try each one with and without hashtags in front of it.

### NOTES:

Based on what you've found, identify five Pinners (businesses or people) that could be potential prospects and follow their boards.

- 1
- 2
- 3
- 4
- 5

### 3) TAKE ACTION:

Start engaging with potential prospects by:

- Scanning your new dashboard filled with the boards you follow for any relevant content.
- Re-pinning any content from prospects onto boards of your own that are useful to your followers, which could be your customers and prospects.
- Adding value through commenting on pins posted by your prospects.

### [FOLLOW-UP EXERCISE]

**Spend 20 minutes a week:**

- Scanning the boards you follow to see any new pins (10 mins)
- Re-pinning any relevant content that your prospects are posting (5 mins)
- Evaluating anyone as a prospect who has pinned something from your website (5 mins)



# BECOMING EFFICIENT

There are ways to become more efficient at social prospecting by using apps or third-party services. Each of these tools allows you to load more than one social network and set up streams that you can monitor. Streams can include groups of people or profiles that you want to monitor, or specific searches that you want to monitor regularly (keyword, industry or hashtag searches).

When you use one of these services, you can go to one place and do your monitoring and posting as well as scheduling posts for the future - say the rest of the week. If you do schedule posts, don't forget to check in regularly (daily is best) so that you can take action on any engagement you've generated - someone asking a question, responding or sharing your content. That's a good way to start a conversation and you don't want those connections to go cold by leaving too much time between contact and response.



# ABOUT US

Savoir Faire is an integrated marketing firm that sits at the crossroads of traditional and digital marketing, with an adventurous spirit when it comes to evolving disciplines. We have worked with a broad range of clients to solve a wide variety of business challenges. We are a collection of talented, curious, and dynamic individuals who all share a passion for bringing a brand story to life and getting it the results it deserves.

If you have questions about social media or using any of these networks as prospecting channels, don't hesitate to contact Savoir Faire at (617) 899-2856 or by email: [stephanie@savoirfaire-us.com](mailto:stephanie@savoirfaire-us.com).



## Do you need help with content?

Check out Savoir Faire's blog post:

[How To Turn Your Website Into Your Biggest Marketing Asset.](#)

A Publication of  **Savoirfaire**  
MARKETING COMMUNICATIONS

MORE GOOD STUFF



FOLLOW US