



FINDING AND TARGETING PROSPECTS

Practical Exercises

Exercise 1

Topic: Using Klear for audience research.

You must have a Twitter profile to complete this exercise.

Log into [Klear.com](https://klear.com) with your Twitter account and complete the following steps:

- Select 'Influencers' from the top bar.
- Enter the industry you want to research.
- If you are only interested in a particular location, fill in the location field.

You will now see the top 10 results for your query. To gain further audience insights, complete the following tasks:

- Take note of the data right below the headline at the top: what is the main demographic of this industry on Twitter and which websites do they tend to share from?
- Using the left hand side filters, find the top 10 'Power Users' within this search.
- Open the profile of each of these power users and look at the Analysis, Network and Demographics tabs under their profile description. Discover:
 - The brands they talk with (under the 'Analysis' tab) – take note of 3 brands.
 - Power users that follow them (under the 'Network' tab) – take note of 3 power users.
 - Their followers' demographics and interests (under the 'Demographics' tab): top country, city, top two audience interests, top gender and the biggest age group.

The list of profiles, brands, interests and demographics will provide you with valuable insights about your industry and allow you to follow relevant users, create Twitter lists and track what kind of topics and content they like to talk about and share.

Exercise 2

Topic: Using Hootsuite for audience listening.

Open [Hootsuite.com](https://hootsuite.com) and click 'Get Started Free'. On the next page, log in with your Twitter account.

Set up your audience listening dashboard for Twitter following the steps below:

- At the top left corner, rename 'My First Tab' to 'Twitter'
- Just below it, select '+Add Stream'.
- In the 'Search' tab click 'Show examples' to discover the various ways of conducting a Hootsuite search in order to add it to your stream.
- Type in a search query you want to monitor and click 'Add Stream'.
- Click '+Add Stream' again, this time choosing the 'Keyword' tab; enter up to 3 keywords and click 'Add Stream'.
- Lastly, add your Twitter lists by clicking '+Add Stream' and selecting the 'Lists' tab. If you don't have any lists yet, you can create one within these options.

Now set up your LinkedIn streams by following the steps below:

- Add a new tab by clicking '+' next to the Twitter tab and rename it to 'LinkedIn'.
- Below it, select '+Add Social Network' and connect your LinkedIn profile; you will have to choose from various LinkedIn options, so add two industry-related groups you would like to monitor.
- Create a stream for each group by selecting '+Add Stream'.
- You will now be able to monitor news and trends related to your audience, as well as industry news through relevant LinkedIn groups.

Exercise 3

Topic: Using Crystal Knows for audience research

Crystal Knows enables you to better understand who you're talking to; the solution predicts the personalities of your prospects and customers, so you can send more effective emails and social messages, be persuasive in meetings, and accelerate trust.

Crystal creates a unique profile for anyone with a LinkedIn account, explaining how to speak, email, work with or sell to them most effectively. It tells you the "words, phrases, style and tone of voice you should use to reach the recipient in the way that they like to communicate, rather than your own" – even their tolerance for sarcasm and emoticons.

It builds this profile from what it can glean about them online: their public Facebook or blog posts, their tweets and the other data points.

Crystal will even draft emails to people you've never met, using a tone and language that their online presence suggests will resonate with them

Create an account, log into <https://www.crystalknows.com/> and install the Google Chrome Extension <https://chrome.google.com/webstore/detail/crystal/nmaonghoefpmlfgaknnboiekjhfpmajh?hl=en>

- Log into LinkedIn
- View a prospect or customers profile
- Click the Crystal 'View personality' extension icon on the LinkedIn profile page

You will now see the personality profile

- View the personality profile to gain insights on the individual
- Take note of where they appear on the personality graph
- What are you told about the individual when it comes to communication with them?
- What motivates the individual?
- Look at the Conversation Coach
 - Select from the drop down menus that you need to call the individual so you can schedule a meeting
 - What does Crystal suggest you say to them?
 - What should you not say to them?
- Look at the Scenarios tab
 - What should you avoid?
 - What should you do in a meeting with the individual
- Look at the Email Templates tab
 - When advice are you given when crafting a subject line?
 - What are to Do's and Don'ts when crafting an email?
 - For the email body content what general tips are listed?
 - What Call to Action should you use?

Look at the individual's personality profile in further detail via the Crystal website.

[Home](#)
[My Network](#)
[Jobs](#)
[Messaging](#)
[Notifications](#)
[Me](#)
[Work](#)
[Sales Nav](#)

Are you a developer? lol - You deserve a better job: Let companies apply to you. Salaries: £35K-£100K

Product Marketing Specialist and Customer Information Management Ideas Explorer
Reading, United Kingdom

[Message](#) [View in Sales Navigator](#) [More...](#)

Takes the complex and makes it simple. A dynamic and driven product marketing professional, with a solid sales and marketing background gained from agency and client side roles in the software world. Always concise and constantly listening.

Paul, you're skilled in Customer Relationship Management (CRM)

People Also Viewed

You have 8 free views left in your free trial.

- ☆ focused and likely thrives in a fast-paced environment that encourages risk.
- ★ **Quick Tip:** Challenge ideas and assert yourself.
- | **Type:** Driver (D)
- | **Likes:** taking risks
- | **Avoids:** strict routines
- [View Full Profile](#)

CONVERSATION COACH

I need to...

So I can...

[GET ADVICE](#)

PERSONALITY GRAPH

Exercise 4

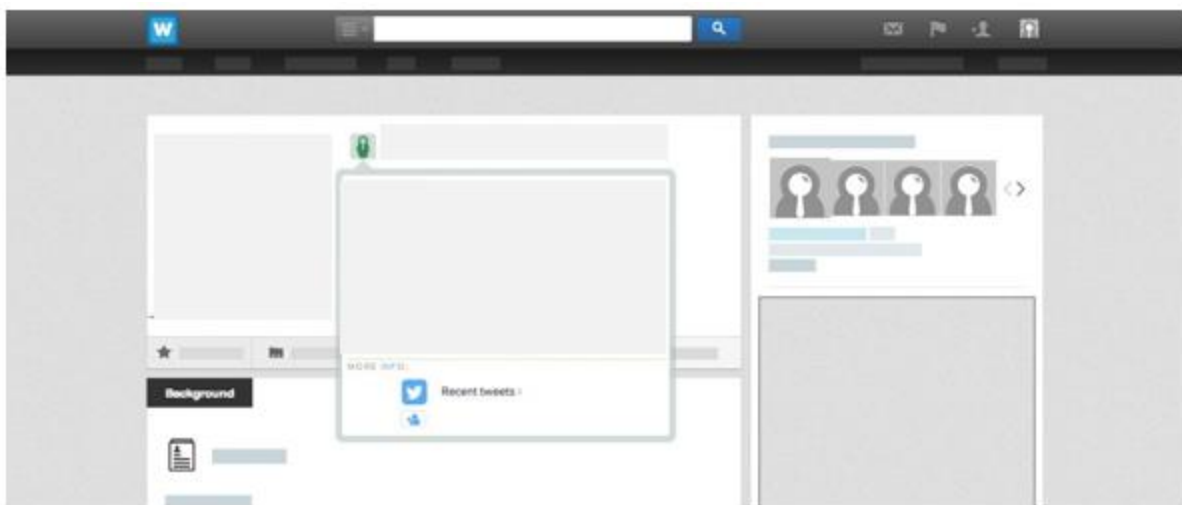
Topic: Discoverly is a Chrome extension which scrapes the web to find any individual's Twitter and Facebook data and adds it to their LinkedIn profile while you view it.

The goal of Discoverly is to leverage commonalities among social media networks and make it easier to discover the personal hook that drives successful networking.

Discoverly is a Chrome extension which scrapes the web to find any individual's Twitter and Facebook data and adds it to their LinkedIn profile whilst you view it. The app also works within Gmail to show all your email recipients' social accounts and updates in a sidebar.

Once you are on a person's LinkedIn profile with relevance to you, with the extension activated, a green icon will appear to indicate extended information on that person including Twitter data and Facebook mutual friends. This can speed up the process of whether they are beneficial for purpose or not.

Discover.ly even gauges the context of relationships—in this case, the number and types of social media interactions between connections. This means users can determine the quality of a contact's relationships and attempt to leverage only the strongest connections.



Install the Discoverly Google Chrome extension <https://discover.ly/>

- Log into LinkedIn
- View a connections profile
- Wait for the Discoverly icon to turn green
- Click the icon to view social insights on the individual
 - How many other social media handles does your connection have?
 - What other social networks do they use?

Open up your Gmail account, select an email from a contact and see any

Exercise 5

Topic: Industry and cultural research – joining relevant conversations.

Part 1

- Find 5 websites such as blogs, news sites and publications that regularly publish news relevant to your industry.
- Subscribe to their newsletter.

Part 2

- Open Trendsmap.com.
- If your business is locally based and only serves a certain location, focus your map on this area.
- If your business serves multiple locations or your products/services are available worldwide, choose 3 top areas and focus your map on them (one at the time).
- For each location of your interest, find out the trending topics and hashtags you can use to get deeper insights into what audiences in different cultures and countries are discussing.

Part 3

- Combine and take note of the information from your newsletters and Trendsmap to use later when engaging with prospects in order to really personalize your messaging.

Exercise 6

Topic: Improving your SSI score on LinkedIn.

Start by clicking [here](#) to find out your SSI score, take note of the result and follow the exercises below to help improve it.

➤ Professional Brand:

- Log in to your LinkedIn profile and completing each of the following:
 - Ensure your profile is 100% complete by filling out all fields, having a professional photo and [an appropriate cover photo](#).
 - Post an overview of your company's products and services via [SlideShare](#).
 - Endorse 5 - 10 connections for skills to increase the likelihood of being endorsed in return.
 - Ask your connections to write a recommendation by clicking the 'Ask to be recommended' button within the 'Recommendations' box on your profile, or [click here](#).
 - Share a well-written, long-form post on Pulse that is related to your professional experience or industry.

➤ Find the right people:

Job Function		▲
<input type="checkbox"/>	All	
<input type="checkbox"/>	Finance	(35)
<input type="checkbox"/>	Information Technology	(19)
<input type="checkbox"/>	Project Management	(11)
<input type="checkbox"/>	Consulting	(10)
<input checked="" type="checkbox"/>	Training	(0)
+ Add		

Industry		▲
<input type="checkbox"/>	All	
<input type="checkbox"/>	Internet	(4)
<input type="checkbox"/>	Human Resources	(3)
<input type="checkbox"/>	Medical Devices	(3)
<input type="checkbox"/>	Computer Software	(3)
<input checked="" type="checkbox"/>	Banking	(0)
+ Add		

Experience Level		▲
<input type="checkbox"/>	All	
<input type="checkbox"/>	Not Applicable	(0)
<input type="checkbox"/>	Internship	(0)
<input type="checkbox"/>	Entry level	(0)
<input type="checkbox"/>	Associate	(0)
<input checked="" type="checkbox"/>	Mid-Senior level	(0)
<input checked="" type="checkbox"/>	Director	(0)
<input checked="" type="checkbox"/>	Executive	(0)

- Click on 'Who's Viewed Your Profile' from the 'Profile' tab drop down menu. Add anyone who has viewed your profile or posts who is not already a connection.
- Click 'Advanced' beside the search bar at the top of the page. Filter your search to only look for 2nd connections. Connect with 10-15 new contacts by clicking the blue 'Connect' button or by clicking the arrow beside the 'Connect' button and selecting 'Get Introduced'.
- Return to the advanced search menu and click 'Jobs' from the menu on the left hand side to filter your search by industry, job role and experience level.
- Complete a search based on your prospect criteria and add 10 – 15 relevant connections. For example, if you are selling computer training courses to the banking sector and your key decision maker will be senior to executive level, your search would look like the image shown here.

➤ Engage with Insights:

- Take 10 minutes to like and comment on relevant content. For example, congratulate connections on a work anniversary or promotion, wish them a happy birthday, comment on a post, etc.
- Click the 'Interests' tab from the menu at the top of the page, select 'Groups' in the drop down menu and click 'Discover'.
- Join 5 – 10 groups that are of relevance to your industry.
- Find group discussions where you can offer some valuable information. The idea here is to provide solutions, not to sell anything.

➤ Build relationships:

- From your home page, help 3 - 5 prospects by sharing their updates or posts they've published.

➤ Allow some time for connections to respond, recommendations to be made and skills to be endorsed – then check your SSI score again. Your SSI is recalculated on a daily basis.

If you need any help with any of the individual activities click [here](#).

Exercise 7

Topic: Using Sales Navigator to discover potential leads

You will need a credit card to complete this exercise. You will not be charged if you cancel before the trial period ends.

To set up an account, go to the [Sales Navigator page](#) and click the 'Start Your Free Trial' button.

Part 1: Get started

- Configure Sales Navigator with your preferences before starting by choosing what vertical, regions and job titles you want to target.
- Click 'Save' to save your existing LinkedIn connections as leads.
- You will then be given the option to 'Sync Sales Navigator with your CRM to import your accounts and contacts'. (You can skip this step if you wish).
- You will then be shown companies that may be appropriate for you to follow. Save whichever companies are relevant from those suggested.
- Fill in the information about what types of leads you are looking for e.g. information about your sales territory, industries you sell to and job functions you want to target.

Part 2: Using Lead Builder

- Click the 'Lead Builder' button to the right of the search box.
- Search for your target job titles or companies.
- Use the various filters to refine your search criteria based on your target audience.
- Find a relevant prospect and save them as a lead.
- Save this lead to an account (the company you want to follow).
- Save this search by clicking 'Save' in the upper-right corner of the search results and select 'Receive daily email alerts'.

Part 3: Finding and saving leads on the same accounts

- Click on the 'Accounts' tab in Sales Navigator and select the account you saved in Part 2.
- Beside the lead recommendations, select "See more recommendations".
- Use Boolean search in keywords to further narrow down your results.
- Save 5 of the most likely decision-makers or influencers at that account as leads.

