CLOSING AND RETAINING

Practical Exercises
Exercise 1

Learning item: Measuring engagement.

You must have a Twitter profile to complete this exercise.

Sign up to a free trial of SproutSocial, attach your Twitter profile to complete the registration and complete each of the following tasks to measure the success of your engagement.

Part 1:

- In the top right hand corner of your dashboard, click the ‘+’ icon and connect your Facebook, LinkedIn, Instagram & Google+ profiles.
- Familiarize yourself with Sprout Social’s Report Builder and the report types useful for measuring your engagement.
- Sign out and give the SproutSocial tool approximately 1 day to pull data from your profiles.

Part 2:

- Sign in, click into each of the report options from the menu on the left (e.g. ‘Group Report’, ‘Engagement Report’, ‘Twitter Profiles’, etc.) and analyze the metrics to measure the success of your engagement.
- Click ‘Export’ at the top right hand corner of each report page and download the report as a .CSV file.
- Store these reports in a folder to measure increases or decreases in your engagement over time.
Exercise 2

Learning item: The Client Lifecycle

You are in charge of creating and maintaining a client management strategy for each stage of their lifecycle. Complete the tasks outlined below, based on your company’s product/service offering, in order to develop a functional process for each client.

On-boarding stage

- Come up with a customer persona for this client (their name and job).
- Write up a welcome email for this client.
- List three headlines of educational content (such as how-to guides, studies, reports, videos) to share with this client.
- List a topic of a webinar or a podcast you can prepare for this client.

Active stage

- Come up with a customer persona for this client (their name and job).
- Write up an email for this client that would attempt to gather more insights on client’s goals and business problems.
- List three headlines of valuable content (such as expert guides or instructional videos) and resources to share with this client.
- List a topic of a comparison guide you can share with this client.

Inactive stage

- Come up with a customer persona for this client (their name and job).
- Think of one problem that your clients usually have that is often the reason for them to become inactive and write it down.
- List a case study you can use to tackle this client’s problem and start a discussion about the solution to it.
- Write a title of an online demo you can create for this client in order to clarify their situation and align their needs with your offering.

Lost stage

- Come up with a customer persona for this client (their name and job).
- Think of a person or a department in this client’s company you could reintroduce yourself and your products to.
- Write down a reward you can offer for feedback about your customer’s situation.
- Think of one problem that your clients usually have that is often the reason for them to stop using your service and write down of a relevant piece of content you could share with this lost client.
Exercice 3

Learning item: Insight Tools – Cloze

Open Cloze.com and select one of the options to sign in: Twitter, Google or email. The following two screens will ask you to connect apps and services of your preferring, such as Gmail, Outlook, Yahoo Mail, Office 365, but also your Evernote, Dropbox, Slack and your call history. Answer a few remaining questions about your company and complete the setup.

You will then have to wait until Cloze gathers all the data from your accounts. When it’s done, click ‘Take the Tour’.

After you have taken the tour, check the following:

- In ‘Agenda’ tab of the left hand side menu, have a look at all your ‘Today’, ‘Upcoming’ and ‘Someday’ items (you can switch between these at the top left area of your screen).
  - Do any items have a title ‘Overdue to connect’ such as your clients or prospects?
  - Do you want to reach out to any of the listed contacts? To do so, click and drag that item right until you highlight the ‘Reach out’ option.
  - Do you have any meeting items that you want to react to? To do so, click and drag that item right until you highlight ‘Reply all’ option.
- In ‘People’ tab, analyze the order in which your contacts are now sorted.
  - Are the ones you see as a priority at the top? If not, drag them up.
  - For your top 5 contacts, click on each of them and check the last time you interacted with them and follow up on any outstanding matters.
- In ‘Companies’ tab, make sure you’re happy with the order in which they are sorted.
  - For the top 10 companies, such as your clients or prospects, have a look at the last time you’ve interacted and add a to-do to follow up from the horizontal bar at the top.
Exercise 4

Learning item: Open Business Networking – LinkedIn Groups

From your LinkedIn profile, complete the following tasks in order to boost your business, find insights and new leads:

✦ Using the search bar at the top, search for groups with members such as your prospective clients or influencers in your industry and join two such groups. Then share valuable content such as guides and blog posts that this group can relate to.

✦ In each of these groups, find three discussions you can participate in, and contribute to the current discussion by sharing your opinion on giving your advice in case someone has a question you know the answer to.

✦ In My Groups section, create your own group by clicking ‘Create group’ and filling in the required information (name, summary, description and email). Share this group with your peers and initiate discussion on current industry news and events.
Exercise 5

Learning item: Scheduling an Online Demo

To prepare an online demo, ask a colleague to help you out by representing the role of a client you want to hold a demonstration for.

To schedule and execute an online demonstration, complete the following tasks:

- Find a qualified lead: Even though your colleague will represent your client in this exercise, think of a real prospect or client that fits your customer profile. To find them, think of a prospect or a client that has recently looked at similar products and whose priority issues could be solved by your product or service.
- Book a meeting online: Register to Calendly.com by typing in your email and clicking ‘Get started for free’ and follow the steps to complete the setup. Then follow the directions from the ‘Quick Start’ video to set up a meeting.
- Send an invite for this demo to your colleague the same way you would to a chosen prospect.
- Prepare a personalized demo: research your prospect on LinkedIn and Twitter, do a Google search on their name and research their website. Then prepare your presentation as follows:
  - Meet & Recap – 2 minutes
  - Discovery – 4 minutes
  - Product demo – 15 minutes
  - Q&A – 5 minutes
  - Closing/Next steps: 4 minutes
- Determine a call-to-action: What do you want the participant to take an action on? Is there going to be a special offer, another call, a face to face meeting? Decide what the next step will ideally be and communicate it clearly with your prospect during the demo.

Follow up: Craft a follow-up email to send them in order to recap the entire discussion and also remind them of your call-to-action and
Learning item: Using social media live streaming for engagement and awareness activities.

Live streaming refers to online streaming media simultaneously recorded and broadcast in real time to the viewer. It is often simply referred to as streaming.

All of the main social media networks (LinkedIn, Twitter, Facebook, YouTube, Instagram) now offer live streaming capabilities:

**LinkedIn**

LinkedIn’s new live video tool introduced in January 2019 - called ‘LinkedIn Live’ - provides another option for video content on the platform, which, since LinkedIn launched its native video tools back in August 2017, has grown to become the most engaging content option available to users. LinkedIn Live will give regular members and businesses additional, immediate capacity to share from conferences, product announcements, conduct Q&As and more.

Initially, LinkedIn Live is only being made available in the US via invite-only. A broader rollout is expected to follow later in Q2 2019.

**Twitter**

While most people associate Twitter with short status updates and hashtags, the platform also lets you broadcast (via Periscope) your thoughts all from your iPhone or Android smartphone without typing a word. Much like its close rival Facebook Live, Twitter live video allows users to quickly livestream events directly to the social media site. Other users can interact with the feed in real time, leaving comments and likes, and once the video is complete it remains in your feed just like any other tweet.

**YouTube**

YouTube Live is an easy way to reach your audience in real time. Whether you’re streaming a product overview, hosting a live Q&A, giving a presentation, you can easily manage your stream and interact with viewers in real time.

You can live streaming directly from your laptop/desktop computer or from the YouTube mobile app just by clicking the “Go Live” button.

Choose your social network of choice

Aim to create a live stream that lasts 2-3 minutes in duration; the video should be engaging and provide viewers with value (explain something, provide insight, offer an opinion, update people on what’s new, discuss a topic).

Monitor the engagement and analyze those that viewed the live stream.

To start a live stream on Twitter:
 الفكر من الواجهة الزمنية أو إضغط على أيقونة الكاميرا من المفكر.

لإغلاق الفيديو المباشر: يمكنك إغلاق الفيديو المباشر في أي وقت من خلال إضغط على القلم فوق اليسار ثمتأكيد أفعالك في قائمة تأتي.

How to end a live video: You can end a live video at any time by pressing the Stop button on the top left and confirming your action in the menu that comes up.