

This is an edited transcript of the November 12, 2014 SmallBusinessTalent.com podcast interview titled [Tap the Power of Social Selling with Craig Jamieson and The Small Business Guide to Social CRM](#).

Announcer: Are you a hard-working, self-employed professional striving for small business success? There is help. Welcome to the SmallBusinessTalent.com podcast featuring candid conversations about successful self-employment.

Stephen Lahey: Welcome to the SmallBusinessTalent.com podcast. I'm Stephen Lahey, and I'll be your host.

Are you trying to integrate social sales tools, like LinkedIn, into your sales process? It can be frustrating and time consuming if you haven't found some kind of Social Customer Relationship Management (Social CRM) solution to help you to do it efficiently. This is a challenge that many busy solo entrepreneurs are wrestling with right now, and that's why I invited Craig Jamieson, author of [The Small Business' Guide to Social CRM](#), to join me on the podcast today.

Craig has been self-employed since 2005. As the owner of Adaptive Business Services, he provides training and consulting to businesses on how to leverage social sales tools, techniques, strategies, and social CRM solutions to increase sales.

By the way, Craig has decades of business-to-business sales experience. Prior to starting his own business, he held a variety of sales leadership positions, including division sales manager and national sales manager. Craig has also taught salesmanship at the university level.

Lastly, Craig writes a column on social sales at [MaximizeSocialBusiness.com](#), and he's empowered to blog for IBM on the topic of social business.

The bottom line? If you want to tap the power of social selling for your business, then get ready to take some notes. Thanks for making the time to be here, Craig.

Craig Jamieson: Well, thank you, Steve. I really appreciate the opportunity to speak with you and your listeners.

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Stephen Lahey: First, as we kick things off, give us a quick overview of your professional background and what led you to start your own business.

Craig Jamieson: Basically, I've done nothing but business-to-business sales management and leadership dating back to 1977. About nine years ago I was the national sales manager for an audiovisual firm, and frankly I hated it. I resigned that position and took about six months off to plan my next move. During this time, I came to the realization that I no longer wanted to manage people and I certainly didn't want to be managed myself.

Most of my background was actually in the electric sign industry, which I love. So I approached a larger company about working for them as a totally independent contractor and that way if I sell something you pay me, if I want to go fishing you leave me alone. And business was really good until the recession hit and my target market, which was actually larger new construction projects, kind of dried up.

During this time I had also developed a networking group that I ran. It wasn't originally designed that way, but this became another source of income so I decided to pour more time and resources into that. And then when I started to investigate social media, the rest of what I do evolved. I'd like to say I had this grand plan, but I didn't. It was just a lot of dumb luck. Something that I call the God thing. So that's how I kind of got into business for myself.

Stephen Lahey: So when you got into business for yourself, what year was that?

Craig Jamieson: Well, it was nine years ago, so 2005, I guess.

Stephen Lahey: And just to give the listeners a clearer sense of what you do, what is the focus of your business?

Craig Jamieson: The focus of my business is training. I specialize in sales training. So that would be traditional selling, that would be social selling, which is just really an evolution of that, and so that would also include things like Social CRM. I also offer my clients assessment tools to help them to find and select new salespeople.

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Stephen Lahey: And you're eminently qualified to write a book on the topic of Social CRM. You've been deep into it for a while now. So let me just give the full title of your new book for the listeners: [*The Small Business' Guide to Social CRM: Build customer relationships that will accelerate your business.*](#) So Craig, why did you decide to go through the blood, sweat, and tears of writing a book? And what's it all about?

Craig Jamieson: Well, writing a book has been something that's been on my bucket list. I've been encouraged by a lot of other people to do it over the years. I know quite a few people locally who encouraged me to write books. And then all of a sudden a little over a year ago I had more and more people saying to me you really need to write a book. So I started thinking about it seriously.

My biggest challenge was I didn't know where to start. I wasn't sure what the topic was going to be and I wasn't sure about avenues of publishing, so I went out and I looked at self-publishing through Amazon, or whatever. And then a friend of mine connected me about a local person who does what's called co-publishing, which was kind of an interesting concept. If I wrote the book, they would provide the editing and the marketing, but then I would also pay them \$5000 to do that. I said, well, that doesn't really strike me as a real equitable kind of a deal. But at any rate, I was thinking about that.

But then out of the blue I get an email from a publisher in Great Britain. They contacted me and they said, hey, we want to publish a book on Social CRM, would you write it? Even better, they were willing to pay me advance royalties. Now, if I told you how much they paid me, you'd understand why my next book won't be on negotiation. But at any rate, that was an opportunity that answered my needs in terms of both an avenue for publication as well as the subject.

I talked with our mutual friend Neal Schaffer, who is a great writer, and he was also kind enough to write the foreword to my book. He told me that most salespeople would be drooling uncontrollably if they even attempted to do this, and I'm just here to tell you that I was practically wearing adult diapers about halfway through. But I was able to write it.

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My book takes you step-by-step through why use a Social CRM, what it is, what it does, how to assess your social sales needs, how to select the right Social CRM solution, how to implement your solution, etc. And because it's a Social CRM, I talk quite a bit about social selling, social business, and social marketing.

Stephen Lahey: For the sake of clarity, what's the difference between a traditional Customer Relationship Management solution, or CRM, versus a Social CRM solution?

Craig Jamieson: Well, I've used CRM solutions since the late 1980s. Back then we called them contact managers. I'm really not sure when the name changed, but I would guess that they wanted to make it sound more customer and relationship focused. The problem with what I call the traditional CRM systems is that, in my opinion, there's really no R. There's no relationship in them. They're just contact managers with a new title. A traditional CRM, to me, remains for most people not a whole lot more than an electronic rolodex with file folders.

Now, Social CRM is the advent of starting to address the fact that people are talking on different channels now. I mean, we're communicating on Twitter, LinkedIn, Facebook, all these types of things. In all fairness, there are a lot of great products out there now that are still called CRMs, as opposed to social CRMs, but in fact they have made the transition to start to address these needs.

But relationships, whether they're business or otherwise, have always been personal in nature. This is the way that we get to know each other and we do that through conversation.

Now because conversations are no longer limited to phone, in person, or on email we need to have a way to be able to track these other critical channels of communication in a Social CRM.

So the central part of a Social CRM is generally the contact record. I need to be able to look at a contact record and know that we've talked on Twitter and we've talked on Facebook, etc. I need to see who they're talking to. I need to see what they're talking about. All of these things are really important and Social CRM addresses that.

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Social CRM, I should also point out, is customer facing. So, that's conversations with me and the customer, but it's also company facing for businesses with employees, so that's collaboration with team members, that's shared connections, that's leveraging the team for social campaigns, all of that.

But what it comes right down to is Social CRM is about discovering new relationships and opportunities, cementing your existing ones – that's critical, I mean, taking care of your existing customer base – and then building all three forward from there.

Stephen Lahey: To add to that, I know in the first chapter of your book you explain “The key benefits of Social CRM”; and you’ve touched on some of those just now, but talk us through a few additional “key benefits” with a solo entrepreneur in mind.

Craig Jamieson: Well, I think the first thing we have to understand, Steve, is that buyer behaviors have changed. First of all, customers are busier, they're more informed than they've ever been before. I wrote an article once asking – what about prospects who are not using social media? Well, even if they're not on social media, the fact is they've got the Internet and they know how to use it. So what's happening here is that they're doing their research. So they have a need for a product or service and they're on the Internet finding out what they can about that before they actually contact the business owner or the salesperson, whomever they may be. It's easier for them to find that information. They're also, particularly if they're active with social networking, they're soliciting recommendations from their friends and their peers. When we combine that type of activity and the ability to monitor that activity on the social networks – and we join in with a Social CRM – then we can better manage and leverage these new realities.

There are a ton of key Social CRM benefits, but particularly for solo folks like you, like me, we want to have the ability to build relationships. Certainly we've got relationships with our existing customers and maybe some good prospects, but we want to build on those relationships and further cement them. And one of the ways that we're going to do this and one of the ways that Social CRM can be particularly beneficial is ensuring that we make the regular quality touches that we need to make. In other words, you don't sell something to somebody and then you never hear from them again. I mean, that's the old joke for salespeople that once

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they have your money, you never hear from them again. But, of course, we need to make those regular touches.

The second Social CRM benefit area would be revenues. That's customer retention, of course. That's generating referrals from those customers. That's finding new connections, and we can do that by targeting connections on the social networks. And once again we can do this in a lot of cases via our Social CRM.

And we want to discover new opportunities. New opportunities can present themselves in a lot of different ways. I mean, people talking online about, hey, I need this, and they name your type of product or your service, you want to be aware of that and have the ability where you can reach out and offer your assistance quickly. So we want to generate leads. We want to do marketing. We want to create brand awareness. For a solo person, maybe that brand is you. Manage your leads, your pipeline, and your customer service.

And then the last benefit area, I think, is organization. Salespeople in particular, and you'll have to forgive me because I relate to being a salesperson, well, organization is not one of their key skills. So we want to organize our contact records. We want to be able to unify our communications so that when I look at that contact record I can see if we've exchanged emails, if we've talked on Twitter, if we've talked on Facebook, see tasks and due dates and meetings and all of this.

So we've got calendar and task management, and finally we have document storage and management. Materials that you have sent out, proposals, all of that. So I think those are the main areas that encompass the key benefits for Social CRM.

Stephen Lahey: Most of my listeners are solo consultants, like we said, and they're in the business-to-business space, and I'm sure you can relate to that. I know I can. It's my world too.

As a solo yourself, how do you integrate your social media activities with your ongoing new business development activities using a Social CRM? Any examples you could give as to how that's useful to you?

Craig Jamieson: Sure. Once again, with the Social CRM what we're doing is we're able to integrate our social networking activities with the CRM and

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we're not only doing social, we're doing traditional selling, so it all becomes interwoven. But one of the things that means is that I, probably like most people, a lot of my emailing and my Twitter activity, or Facebook, whatever, might not even necessarily be done on my desktop let alone on my CRM. It might be done via my iPhone or iPad or my notebook or whatever it might be. So for me what this means is that any of these activities that I'm doing as it related to an individual contact are automatically aggregated to the appropriate contact records within my SCRM, Social CRM.

For me, my most effective social activities, particularly from the standpoint of attraction, and of course social is as much about attraction as it is going out there and finding people, happen to be blogging and, to my great surprise, YouTube. And both of these are customer education focused, and that's part of the new reality is that people are moving away from the pitch and we're moving more towards customer education. Twitter is really great for meeting new people. LinkedIn works well for me building targeted connections and once again for educating people. That's where I spend the bulk of my time.

I think it's important for people to realize that you don't need to be on all the social networks. That's not the goal. It will drive you nuts. Basically, what you need to be is where your customers are found. If your customer is on Facebook, go on Facebook.

In order to be successful then, you have to have the self-discipline to do some critical things consistently. And once again this involves your Social CRM. You need to review your social engagement opportunities, new business opportunities on a daily basis. You need to be able to respond to those. And you also need to determine whether or not these folks should be in your Social CRM at all in terms of contact records for further development and follow up. You need to be able to monitor and evaluate your pipeline daily. Are things moving forward? If not, why are they stuck? How can you unstick them?

Completely review your contact records for history and current social updates before picking up the phone or making a client visit. That's why you have a Social CRM is because you've got all that information. So I'm going to go there, I'm going to look at previous conversations we've had. I'm going to look at previous exchanges that we've had on the social networks. I'm going to take

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a look at what they're talking about on the social networks right now. It's amazing what you'll find out. I had one gal call me up and she said I'm interested in a Social CRM. And I said, well, I see you're also interested in using Google Voice for that. Is that true, you'd like to be able to make outbound calls from Google Voice? She said, "Yes, but how did you know that?" Well, I'm looking at your Twitter stream. You just mentioned it.

So I mean, all sorts of things that can come up. And then you need to be able to update your contact records after every activity and schedule your next touch. These are absolutely critical.

Social CRM can be extremely powerful, very sophisticated, but my advice is to concentrate on the basics. If you can be proficient with the basics, the rest takes care of itself and you're going to be successful.

Stephen Lahey: It always comes down to figuring out the fundamentals that I need to focus on and how they fit in with my existing new business development effort. Because, otherwise, people get into sort of the flailing around stage.

Craig Jamieson: Also, there are hundreds of these Social CRM solutions that are available on the market right now and they all do things a little bit differently. So you have to have really solid, written down things that you're looking for. I think part of that is setting realistic expectations. I mean, for some people—I think there's a difference between want and need. If I can get this for X amount of dollars and it will not only be a great Social CRM but it will build me a house at the same time, why would I not want that? Okay. But do you need it? No. I don't really need it, but why would I not want it? So you've got to get down to really what your expectations are. And also be aware of the fact that, you know, I don't think there are any perfect solutions out there, so there's a need to be willing to give and take.

And then it comes down to commitment. Are you willing to make the personal commitment to get this done? And it is a commitment. And then are you also willing to make the personal commitment to integrating this into your business long-term. It happens all the time. People get excited about it. They say, wow, this is really neat. Maybe they go through all the process of going around and picking and choose, and then a week later they're not

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using it. Well, that was just a really great investment, wasn't it? So you need to be able to make that long-term investment.

Now, when we talk about it in terms of social media, I think it's also important as a solo person, if I'm looking at a Social CRM, where am I socially now? Am I active on the social networks? Am I doing a blog? Am I doing a newsletter? All of these types of things would be part of being a social business. So if you're not currently at that stage, is it something that's important to you and are you willing to bring the rest of your business up to snuff in order to be able to address that? Otherwise, while you might need a CRM, you probably don't need a Social CRM.

And then the last thing is, and this is all part of that social business evaluation, where are your customers? Are your customers active on social media? Are they active on LinkedIn? Are they active on Facebook? If your customers aren't necessarily active on it—and don't be too narrow in that definition. I know early on I said, well, none of my customers are using social media, and they weren't. But what I didn't realize was that all these other customers that I didn't have yet were active on social media. Okay. So you need to be a little bit more forward thinking about that. But it's just really, it's sitting down and planning and making sure that everything is in place before you jump in. That, I think, is important.

Stephen Lahey:

And I think that trialing different types of Social CRM software will tell you a lot, as well. Almost all of them allow you to have some sort of trial period.

Of course, Craig, it all comes down to actually selling, and we are all using a CRM to make sales easier. At least that's why I would want to use a Social CRM for my own business. It's obviously important to have goals. And in Chapter 7 of your book, you talk about the significance of having a specific process relating to your Social CRM goals. Can you kind of walk us through the process that we need to have mapped out and how we can approach obtaining our Social CRM goals?

Craig Jamieson:

Once again, as a solo entrepreneur here, my needs are pretty simple. I'm kind of a bottom-line guy so my overall goal is to increase revenues. I can do this one of three different ways. I prefer to do it all three ways. That's customer retention – getting more business out of my existing customers, getting referrals for

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new business, and, finally, discovering new business opportunities. And I really think, going back to what I said before, you can do that by concentrating and mastering what I call the three C's, which are contacts, communication, and calendar. And those are all basic CRM functions.

Now when we become socially oriented, we've got an unbelievable opportunity to discover new opportunities and expand your network of targeted connections and that's via social prospecting. CRM is just a tool to me. It's nothing more. It's nothing less. I mean, I've been waiting for them, but orders have not tweeted themselves in yet. So, social certainly does not replace traditional selling. It only augments and amplifies that which we already do well.

So for me it's keeping track of those conversations, it's ensuring the proper amount of recurring touches with each. It's learning as much as I can about people in order to understand their needs better and to find common ground. It's educating rather than selling that I'm providing a service. Because going back to the new buyer behavior standards, people are out there educating themselves now. You can be the educator or you can not be the educator. If somebody else is educating them, they're happily going to be spending your lost sales revenue. That's kind of the way that I look at it.

I want to monitor my pipeline. I want to sell more stuff. Some of it's social. Some it's traditional in terms of sales. And certainly this might look different to different people. If I'm a salesperson that looks one way, I'm looking for somebody on social media that has identified a need for my type of services or a dissatisfaction with a competitor's offering or they express some sort of pain point that I can solve with my product or service. If I'm a support type of person, if that's my thing, then I'm looking for people that need help using my products or services. And that's certainly an opportunity. People that are not happy with what you're doing now, if you can support them beyond their wildest expectations, I believe you actually have a stronger customer than you ever did before. If I'm more of a marketing person, I want to create that brand awareness and buzz.

As a solo person, these are some of my thoughts. Not only do I want to attract people to the pipeline, I want to make sure they go

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through the pipeline quickly. I want to get better campaign results. Better click-through rates. That's the odd thing about social selling, which for me is that social selling inevitably now becomes social marketing. Ultimately what social CRM allows me to do is maximize my relationship-building activities, leverage actionable sociable intelligence to ensure that I make the appropriate number of touches. And those things, if you do those things consistently, those will translate to revenues which goes back to my one overall goal is revenues. That's really what it is. I hope that answered that question.

Stephen Lahey: You did. And the way I look at it in terms of the Social CRM, for me is it's an efficiency tool. It brings everything into one place. Because I'm doing a lot of different things and I'm across a number of different social networks, so it allows me to do more of what I should be doing in terms of warming up contacts and then reaching out to them when the time is right, which I think is basically what you're saying.

Craig Jamieson: Exactly.

Stephen Lahey: So Craig, as we wrap up, I'm sure that a lot of people listening would like to learn more about your services and hopefully buy your book. How can they do that?

Craig Jamieson: Steve, once again, thanks for this opportunity to speak with you and your listeners.

My LinkedIn headline reads that we show businesses how to leverage social sales tools, techniques, strategies, and social CRM to increase their revenue. So my area of specialty once again is social selling. I offer training and consulting in that area. And I am also a solution partner for Nimble Social CRM, which fits well with my social selling focus. Additionally, I can help companies with the selection of good salespeople via a variety of assessment tools, including job benchmarking.

Learn more about me [on LinkedIn at Craig M. Jamieson](#). My website is [Adaptive-Business.com](#). The book is available on Amazon. It's called [The Small Business' Guide to Social CRM](#). I might suggest that with the holiday season approaching they make great stocking stuffers. And of course I'm also available for any speaking engagements. So, Steve, thank you again.

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Stephen Lahey: I appreciate it. And I would recommend to everybody that they get your book. I'm still waiting on my autographed copy, but I got Kindle ahead of time, Craig. So I was prepared for the interview.

Craig Jamieson: I appreciate you getting that, and your autographed copy went out in the mail yesterday.

Stephen Lahey: Awesome, can't wait to get it. Well, thanks again!

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