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This is an edited transcript of the January 21, 2015 SmallBusinessTalent.com podcast interview titled [Phil Gerbyshak on Social Media Strategies That Win More Clients](#).

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.

[Phil Gerbyshak](#) is my guest on the podcast today. Phil is a well-known social media consultant, author, and speaker.

First, the back story – Phil spent his early career in financial services sales, later working as a financial planner until his passion for technology led him to teach others in his firm how to leverage software, email, and the Internet to make them more productive and profitable. Phil ultimately became the Vice President of Information Technology for his company. In that role, he delivered in-person and online technology training to more than 2500 networked financial services professionals across 70 plus branch locations and numerous small offices.

In 2010, Phil made the leap to self-employment and founded his social media marketing agency. Now as Director of Social Strategy for Actiance®, he works with clients all around the world helping them to connect with customers online and grow their sales.

Today Phil joins us on the podcast to share his practical advice on how to develop a social media strategy for your business, one that can help you to achieve your sales goals for 2015.

Welcome to the podcast, Phil.

Phil Gerbyshak: Hey, thanks, Steve. It's great to be here.

Stephen Lahey: Your professional journey has been a really interesting one. Tell us about your background and then what you're doing today.

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Phil Gerbyshak: Sure. So I started out—let's rewind a long way back—I used to deliver email by hand when I was in the Navy. I developed websites, coding by hand on my own when I was going to college. I did stock trading by hand back before all the big electronic stuff happened, and then I became VP of IT at a financial services company working to get them, advisors and investment bankers and such, to leverage technology. That's when I fell in love with social media, so I ran my own agency for 4-1/2 years.

And then recently I made the move to what I'm doing now. I'm the Director of Social Strategy at a software company called [Actiance®](#). And we provide a lot of different solutions relating to using social media, using email, enterprise social inside the organization, all in a compliant and, most importantly, in a profitable way so that folks can actually see ROI from the money that they're investing in social media, not just get likes and favorites and re-tweets and stuff that is meaningless, but really get real business.

Stephen Lahey: I want to clarify a couple things. When you said delivering email “by hand”, I'm assuming you didn't mean printing it out and then walking it down from one end of the Navy ship to the other “by hand”, but rather routing email. You were sort of the filter, right?

Phil Gerbyshak: Right.

Stephen Lahey: That sounded funny to me. I thought the Navy was more advanced than that. Just kidding. And the other thing I want to clarify is you're a business-to-business marketing guy right now.

Phil Gerbyshak: That's right.

Stephen Lahey: And that's exactly where we're at as listeners, we're in the business-to-business space. We're mainly solo consultants of different kinds.

There's so much we could talk about in terms of social media for solos. For me, the best social media tools for driving traffic and getting sales results are LinkedIn and Twitter.

But, as you know, there has been a lot of talk in the blogging world about how all this free stuff is going to come to an end. People say that we're soon going to see the end of free social media marketing

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and every platform is going to become like Facebook where you have no organic reach. So is the party over, Phil? Should I be sad?

Phil Gerbyshak: Well, you should be sad if you're hanging on to the past. Certainly this is not the same game as it was 5, 3, even 2 years ago. Organically reaching folks just by farting in the wind is not going to work anymore. You can't just post a status update and hope that business is going to clamor to your door. You can't publish a blog post and expect that business is going to come to you. You have to make the effort to get it in front of the right people. So that's what's different. Social media marketing is not dead. It's just changed.

It used to be that folks would search for what they wanted and there were only a couple of search results. I remember publishing content and being the only article that came up when I searched on the words that I used. But now more content is being produced than ever before. Probably by the time we get done recording this podcast, there will be 10,000 articles in your space that have been published today. And now everybody is blogging, and if you think about Twitter and the average person, and the average brand posting 10, 20, 50 tweets a day, holy cow, we're tossed into a waterfall of activity so we can't expect people are just going to accidentally find that.

Stephen Lahey: Absolutely.

Phil Gerbyshak: We're talking about getting our content in front of the right audience, the right people. And if you don't know who that is, then you're lost. So, if that's what you're hoping for, that you're going to accidentally get business, yes, you should be really sad.

Stephen Lahey: Well, very little happens by accident on social media. As much as I enjoy LinkedIn and Twitter, the only reason they've been successful tools for me so far is because I follow up and actually add a human touch.

Given my B2B sales background, I'm all about reaching out. But there's a limit to how much of that I can do, of course. So, with that in mind, let's do a quick overview of the social media marketing pay-to-play options and what all that means, and specifically what all that means to a solo professional that wants more leads.

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Phil Gerbyshak: Sure. So let's talk first about the most important pay-to-play that folks need to know about and that is the LinkedIn pay-to-play. There are two pieces to that. There's an advertising piece, which is a sponsored update from a company page. And then there's the other side, which I think is really the more powerful side, and that is paying for a subscription to LinkedIn. Now, there are a bunch of different LinkedIn plan options. There are sales options, recruiter options, whatever. If you're a solopreneur and you look at the paid subscription option, then I'd recommend considering the [Sales Navigator](#).

LinkedIn Sales Navigator is really powerful and they've released three new changes that actually I just learned about yesterday. The first one is 25 unlocked profiles per month. So what that means is anybody, anywhere on LinkedIn, it doesn't matter if you're a third degree connection, you share a group with them, anything, anybody that's signed up for LinkedIn that you want to talk to, you can get 25 unlock their profiles a month to actually see their information. Now that doesn't mean you can contact them, but you can unlock that profile. So if they show up with a match in your search, you can unlock that profile and see that.

Now, along those same lines there's also a find similar profiles button. The similar button actually allows you to search for similar people. If you find that Steve Lahey is the best consultant that you've ever talked to and you want more contacts like Steve, well, how do you scale that? Before, you just didn't know. But now you have a "similar" button that searches other profiles for matching profile words, which is why it's so important that you put your profile together in such a way that you look like your best competitor only better, so that similar button helps.

Also, you now get 15 email alerts on searches and an unlimited number of saved searches. So what this means is as you search for people, maybe you have zero people that exactly match what you're looking for, but the search terms are correct so you want to use that search again. Or you have 100 people that match and you know that all you need to do is keep talking to these exact people. Now you can save those searches and get email alerts on 15 of them in your inbox, which is just like getting leads in your email every single day or every single week or every single month depending on how you set these filters up.

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Now, remember, with any of these, you still have to make that personal connection. You still need to use an InMail or something like that. This is not magic alone. You still have to make the connection and find a compelling reason to connect, but now at least you get the people that match your criteria. So instead of them having to come to you, you can go to them.

Stephen Lahey:

And that's what I love about LinkedIn and what I was implying before. Having been in sales I naturally want to reach out to people. People with a marketing background, I think, are a bit different. They want people to come to them. Well, I think it's a challenge for these marketers in this new world because—especially on LinkedIn—you do set yourself apart with a personal touch. You can't just automate everything. Marketers love automation, I've noticed. On the other hand, people like me who have a sales background and who are now entrepreneurs, they probably shouldn't just pick up the phone and call everybody, either. There are ways to warm things up first so that you get a better response from prospective clients when you do call. So, I think both sales and marketing folks have something to learn today when it comes to using social media tools.

And I think you've pointed out something else that's really important, Phil. LinkedIn is central for most of the people who are listening to this podcast. Getting a paid account, whatever LinkedIn plan works for you, is a huge plus. There's just so much you can do. And I also love to get my content on LinkedIn Pulse. Do you have any thoughts about LinkedIn as a publishing platform, Phil?

Phil Gerbyshak:

Absolutely. Let's be clear though. You're not publishing on Pulse, per se. You're publishing on the LinkedIn publishing platform and hoping that you get on Pulse. If your article is really good, it will make it to Pulse, and being on Pulse, that's like pouring gasoline on the fire. The LinkedIn publishing platform is awesome. And I only make that Pulse distinction because if you go to LinkedIn Pulse you're saying, well, my article is not here, but I published on LinkedIn's publishing platform. Hey, don't be alarmed. It just means that you have to make some tweaks.

The LinkedIn publishing platform is fantastic. I mean just think of who's on LinkedIn and who could see your article. So, anybody that's using LinkedIn, if your article is good enough and it gets enough eyeballs and it catches a little bit of fire and it gets thrown

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into the Pulse system, then it could get in front of all the people that you would want to talk to. Because if your prospective clients are on LinkedIn, then that means your articles are in front of the people that need to talk to you. That's powerful.

And that's not been the case before because in the past if you were publishing your status updates on LinkedIn and that's all you did, then all you would be doing is talking to your network. Now you've extended that reach to your second, third level connections, and if you hit Pulse, then you're really at the heartbeat of LinkedIn. Now you're in front of everybody who's interested in that topic. And if you do a good job with the call to action at the end of your post to sign up for your newsletter, or get a complimentary phone call, or sign up and go to some website for more information, whatever, you now have an opportunity that you've never had before with LinkedIn—and this is the marketing speak, if you will—it all comes to you now. There's nothing you did other than write a compelling article with an awesome headline and push it, and there's nothing else that you need to do. They will now come to you.

So, LinkedIn is probably the most powerful blogging platform out there. And the great thing is that you can drive them back to your website. Then they can actually go deeper on your topic. I've talked to folks that have had 100,000 people see their article. And those people can do a bit of qualification on themselves, hopefully. That is, if you drive them back to your website, only the people who have a real interest will end up in your lead jar and want to reach out to you.

Stephen Lahey:

Yes, and let's also think about LinkedIn and advertising. I've done a bit of advertising on LinkedIn. I don't sell products online this way. But if I want to get people to my website, get email opt-ins, and so on, I've found LinkedIn advertising is very useful because you can target potential clients very precisely. It does get results. But, then again, I've also gotten similar results by publishing blog posts on the LinkedIn platform, and that's free.

You're more of an advertising guy than I am, Phil, so talk to us a little bit about LinkedIn advertising options for solo professionals and what they represent.

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Phil Gerbyshak: Sure. So LinkedIn offers a few different advertising options. Different pricing structures, of course. But think of it in terms of top fold, so you might have an article, a link back that's just a text ad. You could sponsor an update. A sponsored update is probably the best way because you can target it like Steve just talked about. And then there are sidebar ads.

The best ad, in my opinion, is that sponsored update targeted to the right person because if they see it and it's a relevant promotion, even though it might be advertising, they're still likely to click on it because you took the time to craft your ad in such a way that the right person wants to see it. You have a higher probability of this click-through being a qualified lead as opposed to when you post something in your status update and even if it gets shared, it's not targeted or qualified because it might be Grandma Betty Sue who sees your article instead of the CEO of a company that you need to talk to or a chief marketing officer of a company. So that's the best way to do it if you're looking to pay-to-play on LinkedIn. Put it in that sponsored update. Target it, test it, tweak it, make it better, and you'll get the right people to actually see your update.

Stephen Lahey: Traditional marketing is about research and testing different lead generation approaches. It's very analytical. And here we are, we're solo professionals, we may not have a deep marketing background from that standpoint. How can we do a little bit of testing, a little bit of research, intelligently across multiple social media platforms? What I see a lot of people doing is just sort of blasting through Buffer, or Hootsuite, the same content across all the social media platforms. I think that there's a place for that, but when I see that URL shortener from Buffer, or HootSuite, they're not even there. They're just blasting out content in an automated non-human way. Is that really how we should be using social media, Phil?

Phil Gerbyshak: I think you're totally right. I mean, if you're just blasting content and you're not making any personal reaches, that's a mistake. You need to be more targeted.

Of course, some of what you post is for awareness building. I think that for every ten posts, three or four might be just awareness building information. But for the other six posts, you need to think about your target. You need to think about who am I talking to? Who am I hoping will actually engage with this article? Am I making this call to action something that they're interested in, or

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am I just going through the motions? If you're just going through the motions, you're probably wasting your time and your energy with those other six posts and you're probably going to be someone that people don't engage with.

Instead, I want to encourage you to take the time, craft that message, and maybe instead of just posting it to your status, perhaps you pull back a little bit and you send a personal email, a personal InMail on LinkedIn, a personal message where you mention someone on Twitter, or maybe you tag someone on Facebook, and you say, hey, I think this is for you. I'd love to talk to you more about this. It doesn't always have to be content that you create, but it does have to be your targeted call to action. It does have to be focused on what you want them to do. So if you want to start a conversation, it's about framing it in the right way for the right person so that you can get that result, not just blasting your status updates.

**Stephen Lahey:** And when you think about measuring social media results—and let's just talk about LinkedIn and Twitter for now—how do you approach measuring what's happening, what's working, and what to do about it?

**Phil Gerbyshak:** First of all, what am I putting out and what am I getting back – what response? It's not just about who I can reach, it's about actual responses. Some of them might be conversations or even if someone favorited something. Then it's about doing the right thing with that favorite. So, for example, if somebody favorites your tweet and they're not mentioned in it, so it isn't about them but it's a topic that they're interested in, well, now you might reach out to have a conversation with them. That's something that you can measure as well.

On LinkedIn, it's people who contact you, people who click that link and go to your website and opt-in by email because they have an interest in your white paper, or an interest in your blog. And of course it's people who look at your profile. If you have a free account, you only get information on five people at a time who have looked at your profile. Again, that's why you want a paid account so you can see everybody who's looked at it. Take a look and see who did that. If you posted a status update today, then you should think, well, that's probably the reason that they clicked on my profile. Or if you published an article on LinkedIn today and

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they clicked on your profile, what article did you write? Those are all basic metrics that you can look at. It's a pretty manual process.

And then just looking at how many more people are following you, how many more people are you connected to on LinkedIn. Are they targeted connections? This is where you need a connection strategy. Who are the people that you're connecting to and why are you connecting to them? What good do they do for your network, for your business, what good can you do for their network or their business? Those are all metrics that you need to understand. And then tying that back to a business result you want. Is it that you want an email newsletter subscriber? Is it a phone call? Is it an email conversation? Are you using a Social CRM to track that stuff? Give yourself a social score for engagements, give yourself a social score for conversions. Then continue to tweak and see what works so that you can be better tomorrow.

Stephen Lahey: Well, you're speaking my language now because what you're talking about is definitely a sales mindset.

Phil Gerbyshak: Yes.

Stephen Lahey: But let me also say this. I'm relatively clueless about the advertising side of social media platforms. And yet I did make the right choice, from what you said, with LinkedIn by placing really targeted ads. But on Twitter I really haven't done any advertising because I find it more confusing. I know that you can now do advertising on Twitter in a bit more targeted way, so, before we start wrapping up, let's talk about Twitter just for a moment. Are there pay-to-play options on Twitter that make sense, potentially, to test?

Phil Gerbyshak: Sponsored updates on Twitter hopefully reach the right people. But targeting on Twitter is much harder because you may have no idea what anybody's professional role really is. In fact, before we even go too deep on this topic, I don't know that I would pay to advertise on Twitter. But if you thought that Twitter is where your market is, then sponsoring an update may be a way to go, and perhaps sponsored follows so that you're a suggested account to follow. That is, if somebody follows someone similar, then they should follow you too. Those are some ways to pay-to-play on Twitter as a solopreneur.

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Any of the other sponsored stuff, like a sponsored trending topic or paying for a verified account or anything like that, that's really expensive for a solopreneur. But you might instead want to sponsor a Twitter chat. You might want to find a chat with people that you know are your target audience. Hopefully you've already participated in that chat. Don't just be a sponsor that gives TweetChat money and then doesn't ever participate. That doesn't work. You're probably not going to get any ROI on that. So instead take part in a Twitter chat. Make sure that it's what you want and then potentially sponsor a week. You get a couple of extra links that are a little bit more promotional because usually the host will say, hey, this Twitter chat is sponsored by Steve Lahey, click on this link and sign up for his newsletter, or get his free download, or whatever it is.

There are other ways to advertise on Twitter, but as a solopreneur I wouldn't go with anything else.

Stephen Lahey: Now as start wrapping up, I'd like to touch on email marketing and how that fits into this picture. I've been hearing some folks out there who talk about the death of email marketing, and I think that's, to be very candid, pure nonsense. But, from your perspective, how important is email marketing today in the scheme of things for a solo entrepreneur?

Phil Gerbyshak: It's really critical. Email marketing is absolutely vital. It is a one-to-one conversation that's actually one-to-many. And by that I mean that you can customize it with their name, you can know more about them, once you get somebody's email address you can run it through a Social CRM system, you can see where else they are on social, and you can get connected with them. So capturing that email address is really important.

Email marketing, though, if you're going out and buying a list, then you're stupid. That's just a waste of time. Don't go buying a list. It's like, hi Steve, you've never heard from me before but here's a great offer. Well, who the heck are you, how do you know me? You didn't qualify me at all, and you're just wasting my time. So if you're just buying a list and blasting into the ether, then you're wasting time and money. Instead, I want to encourage you to think about how you can develop a list that you can market to, that you can educate, that you can get to the point where when they need

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your product, you're making some offers to them that are very relevant, and they actually make a purchase.

So this is where building the right list is still really wise. Still really effective. Building the wrong list or buying a list, still very ineffective. People are buying even less Viagra today than they probably ever have through spam ads, which is why email list prices are going down. People are immune to buy my crap blasts. Not only that, but they're not reaching inboxes anymore. Google and Hotmail or Outlook I guess it is now, Outlook.com, any of the free services even they are doing their best to keep spammy crap out of people's inboxes. So if you're a spammer and that's what you think email marketing is, it is absolutely, positively dead.

Stephen Lahey: It's very encouraging to hear you say that. I think the closer you can come to a personal one-on-one conversation with every email that you're sending I think that's a good thing. Phil, how do you approach writing an email that gets someone interested in engaging with you? I think that's an art and I know you have some expertise in that area.

Phil Gerbyshak: First, this is not a 30 second fix. So if someone wants a shotgun method that's always going to work, that takes almost no time, sorry, it's not going to happen.

I call it my three R method for getting most, not all, but most of your personalized emails responded to. The first R is rapport. You have to build rapport right away. Be really quick about it, but be extremely personal about the person that's getting it. This is where you've done some research.

This leads into the next R, which is relatability. Show them that you know what their problem is or might be. And I say is or might be because they might have asked a question months ago or posted an article with a question mark on it and they might have found the solution to that already, so don't be so presumptive as to say I know this fixes your problem, but rather say this might fix your problem. A little bit softer. And you find that by Googling them, using a tool like Mention.com, using social media, your Social CRMs. Do this research, be relatable, that shows that you know what their problem is; and then last but not least, you have to give them a reason. A reason for actually taking action. What's in it for them and why should they care about you and your solution?

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Now, there's another R and that is make sure that they can respond to you. The “reply to” address must be a mailbox owned and monitored by a human being. This is really important. If you're sending this out and it's a donotreply@domain.com, that's a problem. Or if it's sales@domain.com, that's a problem. If you think about this, that's because if they reply, they want to talk to the person who sent the message, not some department.

Along those same lines, and this seems really simple but it get this all the time, if the email address is SteveLahey@domain.com, make sure that the display name is Steve Lahey, right? It means that there's a match there.

I've gotten emails from people that are totally mismatched. I get an email from a Gale and then in the signature line or in the email address it's got like skippypetunia53. Well, what the heck is that? You can't take the time to do that? So if it doesn't match, it's going to draw some red flags and I'm going to be like what in the heck are you doing? So I'm not going to do that. Also make sure that you include a phone number in case that's what your prospect prefers. Because just because you sent an email doesn't mean that they love email too.

Stephen Lahey: I couldn't agree with you more on all of that. By the way, I love skippypetunia53. I'll have to use that as my “reply to”. That would cover all the four Rs right there. [laughs]

Phil Gerbyshak: Absolutely.

Stephen Lahey: Well, Phil, as we wrap up, I'm sure a lot of listeners would like to connect with you online and get access the resources that you have available. There are some interesting ones. How can they do that?

Phil Gerbyshak: The easiest way is go to my personal website, [PhilGerbyshak.com](http://PhilGerbyshak.com). If you want to learn more about my company, it's [Actiance.com](http://Actiance.com). And then if you really want to get personal with me, the two ways are really the two platforms that Steve and I talked about today. On Twitter I'm @PhilGerb or on LinkedIn you can search for Phil Gerbyshak or use LinkedIn.com/in/PhilGerb. And if you don't like LinkedIn or Twitter, then just search for “PhilGerb” and you'll come across my profiles for the other social media platforms I'm on. Reach out to me. The good news is that email is not dead and

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I'll get a notification. Then I'll reach out to you on your favorite platform.

Stephen Lahey: And you're a very accessible guy, Phil. You put the social in social media.

Phil Gerbyshak: I appreciate that.

Stephen Lahey: Thanks so much for joining me on the podcast, Phil.

Phil Gerbyshak: It's great to be here. Thanks for having me.

Stephen Lahey: And to our listeners, thank you for spending some time with us today. If you like what you heard, I encourage you to visit [SmallBusinessTalent.com](http://SmallBusinessTalent.com) now and subscribe to the podcast by email. When you do, you'll be alerted whenever I post fresh podcast content, of course, but you'll also receive special resources for email subscribers only, including my LinkedIn guide to social selling, and much more. Thanks again for listening today and best wishes for your success.

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