CASE STUDY

How Oktopost Empowers CBIZ's Social Selling Program, Influencing $800K in Revenue

About CBIZ

CBIZ is a leading professional services firm that specializes in providing financial, employee, and insurance services to businesses of all sizes. With expertise in accounting, tax, and consulting, CBIZ is committed to helping clients navigate financial complexities and achieve success. Their innovative approach, skilled professionals, and client-centric focus make them a trusted partner for businesses seeking comprehensive and effective solutions.

Location
Cleveland, OH

Industry
Financial Services

Company Size
6,500

The Challenge

CBIZ recognized the need for a comprehensive social selling strategy to empower its revenue producers. However, a significant portion of their revenue organization did not have the time or expertise to make social selling a priority. For this reason, they needed a platform that would ensure widespread adoption of social selling and demonstrate the tangible impact of social media engagement on revenue growth.

CBIZ aimed to build a robust program that equipped its sales teams with essential tools for social selling. The key goal was to not only secure buy-in from revenue producers but also to showcase the direct correlation between social media interactions and revenue generation through Salesforce.

They sought to create comprehensive dashboards showcasing the influence of social media on revenue. However, relying on revenue producers to manually update social media interactions in Salesforce proved time-consuming and error-prone. This led to discrepancies between the actual revenue influenced by social media and the reported figures.

The Solution

CBIZ began its social selling journey by prioritizing LinkedIn profile optimization and advocacy training. They launched a two-session training program within the first 60 days of each revenue employee's start date which covers LinkedIn profile enhancement, LinkedIn and Oktopost familiarity, accurate CBIZ brand representation, and advanced social selling tactics.

This training didn't stop with the employee's onboarding. Ongoing training includes regular lunch and learn sessions tailored to each office's needs, quarterly live training sessions for all user levels, and the launch of a Social Media Resource Center. The Social Media Resource Center provides enablement journeys for social media tools and offers training for employees to enhance their LinkedIn profiles.

Oktopost was central to CBIZ's social selling success. Because advocacy sharing was a seamless experience, CBIZ's revenue team was able to adopt it with ease.

As a result, CBIZ was able to accomplish the following:

Improved Adoption of Social Selling Among the Revenue team

Oktopost's ease of use coupled with ongoing education efforts significantly improved the adoption of CBIZ's social selling program. Employees who once claimed they did not have time for social media became advocates for Oktopost after witnessing its impact on increased sales pipeline and opportunities.

Strategic Content Management

CBIZ strategically manages content on the Oktopost board to cater to diverse service lines. Emphasizing consistency, a mix of media types, and a varied posting schedule, CBIZ can keep the content fresh and engaging. The introduction of content suggestion features further involves users in the process, creating a more collaborative environment.

> **Oktopost played a central role in CBIZs social selling success, enabling seamless advocacy sharing. The platform, coupled with ongoing education efforts, not only improved adoption among the revenue team as well as non-revenue generating team members, but also strategically managed diverse content and directly proved social media's impact on revenue.**
>
> — **Brittany Otting**
> Director of Social Media
> at CBIZ

Directly prove Social Media's Impact on Revenue

Before Oktopost, CBIZ faced challenges with accurate reporting due to manual data entry. Now, CBIZ can implement automated flows in Salesforce using Oktopost's advanced tracking and analytics. Their goal is to:

- Capture social media interactions seamlessly
- Eliminate the need for revenue producers to manually update their social activities
- Provide more accurate and comprehensive insights into the influence of social media on revenue

Using Oktopost, the CBIZ team created dashboards in Salesforce to track social media's impact on revenue and opportunities, providing tangible evidence of social selling's value.

> **Oktopost enables us to strategically curate diverse content for a consistent and engaging social media presence. The mix of media types and varied posting schedule, along with collaborative content suggestions, has transformed our approach and enhanced CBIZ's social presence significantly.**
>
> — **Brittany Otting**
> Director of Social Media
> at CBIZ

The Results

CBIZ's strategic social selling approach with Oktopost emphasizes empowering teams through tools, continuous education, and measurable results. The extensive use of Oktopost by CBIZ advocates exceeded expectations, resulting in increased reach and engagement. In fact, CBIZ saw a 67% increase in LinkedIn engagements due to its advocacy program. They positioned its revenue team as thought leaders, enhancing credibility and facilitating connections with potential customers.

Despite facing initial reporting challenges, CBIZ successfully attributes $14 million in revenue to cases where social media played a role in the sales cycle. As a part of this initiative, Oktopost played a role in generating $800,000 in revenue. Moreover, 60% of opportunities influenced by Oktopost resulted in successful closed-won deals. This transformed CBIZ's revenue generation, while fostering a culture of continuous learning and adaptation, and solidifying their position as industry trailblazers.

> **With Oktopost, CBIZ transformed its social selling strategy, emphasizing tools, education, and measurable results. The platform's ease of use and advanced tracking in Salesforce led to $800K of won revenue where our advocates' posts on social media served as an influence, positioning CBIZ as a leader in our industry.**
>
> — **Brittany Otting**
> Director of Social Media
> at CBIZ

$800K

Revenue touched by social

+60%

Opportunities touched by social became closed won

+60%

More LinkedIn engagement due to advocacy

Oktopost

One single platform for social media

Contact us to learn how Oktopost can help you drive engagement, measure success, and link social media campaigns to revenue growth.



www.oktopost.com