

Operationalize Social.

Practical plays for Create, Capture, Convert, and Champion. The triggers, rhythms, owners, and metrics required to run social as a real revenue channel.

01

START HERE

The way buyers discover, evaluate, and trust companies has moved into public feeds, private communities, and AI-assisted research.

Operationalize Social is the system for turning LinkedIn and broader social engagement into a triggerable, measurable, governed, attributable, and reportable revenue channel.

The motion has four layers: **Create** builds trust, **Capture** turns awareness into signal, **Convert** turns signal into conversation, and **Champion** turns customers into proof and consensus.

This playbook is for anyone who wants to take social seriously as a revenue channel inside their company. Each section includes the plays, triggers, operating rhythm, metrics, and tooling needed to run the motion with discipline.

UP NEXT

You get one profile. Use the capacity you have on the highest-value actions, in the right sequence.

Five rules to follow.

01

Treat LinkedIn differently than email. You get one profile. Use the capacity you have on the highest-value actions, in the right sequence.

02

Build trust before asking for time. Content, comments, customer proof, and useful resources make the next touch feel familiar.

03

Capture awareness where it happens. Most buying signals happen outside your website. You have to listen where the market actually moves.

04

Route context, not tasks. A rep needs to know who engaged, what they engaged with, why it matters, and what to do next.

05

Close the loop with proof. Customers create stories, stories create trust, and trust feeds the next layer of demand.

THE FRAMEWORK

Create. Capture. Convert. Champion.

Four stages that compound into a revenue channel.

Each stage produces fuel for the next. Plays in one stage feed signals into the next. The whole motion only works when all four run with the same discipline.

Create

01

Build market trust in public through customer insight, founder POV, and useful ideas.

Capture

02

Identify, enrich, qualify, and route social engagement so the business can act on awareness.

Convert

03

Turn captured awareness into conversations through context, timing, and trust-safe outreach.

Champion

04

Turn customer success into public proof, advocacy, expansion, and market consensus.

Create

Where you build the audience that everything else stands on top of.

WHAT IT IS

Create is the daily work of producing content on LinkedIn. Two motions: **posting** builds your audience, **commenting** builds direct relationships and borrows reach from someone else's. Both produce the trust the rest of the motion needs.

WHY IT MATTERS

Content is the fuel that powers the whole system. Not all content is created equal. Great content carries the human experience and context only people can bring. If it's AI slop, the whole channel breaks.

Buyers don't buy from companies they don't know. LinkedIn is where they figure out who you are before they ever ask for a demo. Show up consistently with something worth saying, or the rest of the motion has nothing to work with.

HOW YOU DO IT

Two motions: posting and commenting.

Posting: run from your call recordings

Build your owned audience. Every post that lands earns reach for years. The motion runs off conversations your team is already having.

- 1 Record every meaningful conversation.** Sales calls, customer calls, internal strategy, demos. The call library becomes the idea engine.
- 2 Pull ideas weekly.** Look for questions, objections, customer wins, and the language customers used. If three customers said the same thing in different words, it's a theme worth posting.
- 3 Break the ideas into posts.** Lead with a strong hook in the first two lines (the reader decides whether to click "see more" right there). Aim for 1,200-1,500 characters: long enough to develop the

idea, short enough to read on a phone.

- 4 Publish on a locked schedule.** Three posts a week is a healthy pace. Ramp new profiles slowly.
- 5 Respond to every comment.** Reply by name, ask a follow-up, tag people who would care. Replies compound your reach.

Commenting: run as a daily task queue

Build direct relationships with buyers and reach into other people's audiences at the same time. Costs nothing, puts you in front of buyers who don't know you yet.

- 1 Build a target list from ICP fit or signal.** The accounts you want to be seen by, and the people inside them who already showed engagement.
- 2 Surface their posts daily.** The target list becomes a daily commenting queue your reps work without hunting.
- 3 Work the queue each day.** Ten substantive comments per rep is a great place to start.
- 4 Comment with substance only.** Add a perspective, ask a real question, or tag someone who belongs. Never "Great post!" or "Love this!".
- 5 Mix targets.** Target accounts, industry voices, internal team posts. Be early: the first 10 comments on a post get the most reach.

SWIPE FILE

Weak vs strong: hooks and comments.

Show, don't tell. Use these patterns as your reference.

Hooks (the first two lines of a post)

WEAK "Here are 5 tips for better content marketing..."

STRONG "Most B2B content fails by line three. We rebuilt ours from scratch and the numbers told us why."

WEAK "Excited to announce our new product launch!"

STRONG

"We just shipped something we'd been arguing about internally for 6 months. Here's the case the skeptics finally won."

WEAK

"A lot of people ask me about LinkedIn strategy..."

STRONG

"3 sales calls in a row last week ended with the same question. Most teams answer it wrong."

Comments (on other people's posts)

WEAK

"Great post!" / "Love this!" / "100% agree."

STRONG

"The framing on time-to-value is interesting. We've seen teams measuring it get 3x the budget conversations compared to teams that lead with feature parity. What's your read on why?"

WEAK

"Couldn't agree more!"

STRONG

"Hard agree on point 2. We saw the same pattern in our last 50 deals. One nuance we'd add: the buyers who pushed hardest were the ones who'd already failed once with a similar approach."

WEAK

"This is gold!"

STRONG

"Tagging @[Name]. This is the conversation we had last week and you described it better than I did. Worth a read for anyone wrestling with the same question."

PLAYS

Repeatable plays you can run inside Create.

Founder POV Engine

The founder publishes regularly using ideas pulled from yesterday's customer calls. No content calendar; real conversations turned into posts. Over time, the founder's feed becomes where the category narrative lives.

Territory Warming

Each rep spends 30 minutes a day leaving substantive comments on accounts in their book. Inside 90 days, every buyer in the territory recognizes the rep before any DM goes out.

Cross-Function Storytelling

Posting shouldn't just be the founder or sales team. Get CS, engineering, and marketing telling different sides of the same story. Each function reaches a different persona and adds credibility you can't get from one voice.

Bring Silent Buyers Into the Conversation

Most buyers will never post. Engage them by commenting on the influencers and thought leaders they follow, and tag the buyer into the thread when it's natural. You join their feed and put them in front of yours at the same time.

KPIS

Three numbers to watch.

- **Output volume.** 3 posts per week and 10 comments per day across the team.
- **Impressions.** Not a perfect measurement (it captures all engagement, not just ICP), but the directional growth signal for your reach.
- **ICP reach.** The number of buyers who match your ICP criteria and engaged with your content in a given month. The signal that says you're reaching the right audience, not just any audience.

TECH STACK

● FirstTouch

Commenting queue and target lists

● AI agent

Drafts post candidates from calls and news
e.g. Codex, Claude Code, Gemini

● Content workspace

Where post candidates land
e.g. Notion, Coda, Airtable

● Call intelligence

Mines conversations for ideas
e.g. AskElephant, Gong, Avoma, Fathom

● Team chat

Coordination and approvals
e.g. Slack, Microsoft Teams

● Customer support tool

Context for the idea engine
e.g. Pylon, Intercom, Zendesk

Capture

See the engagement that never reaches your CRM.

WHAT IT IS

Capture turns scattered social engagement into something the team can act on. The signals are everywhere: LinkedIn posts, comments, profile views, DMs, reactions, and comments on industry posts. Most of them never reach your CRM today.

WHY IT MATTERS

Most B2B buying now happens in the dark funnel, invisible to your analytics. If you only see the buyer when they fill a form, you only see the last fraction of the journey. Capture is how you see the rest, and turn it into something the team can route, score, and act on.

HOW YOU DO IT

Set up one connected signal layer.

Build the signal layer in four steps

The goal is one source of truth per account, scored consistently, surfaced in real time.

- 1 Connect every team social account to a social tracking tool.** The tool listens for engagement (likes, comments, profile views, follows, DMs, accepts) across every team member's profile at once.
- 2 Connect each team member's network so it can be mapped to your business data.** Now you can track the social reach of the entire company into your CRM, not just one rep's pipeline.
- 3 Layer in other signals on top of the social data.** Website visits, email replies, community mentions, podcast referrals, job-change alerts, "How did you hear about us?" answers. Each one rounds out the picture of a prospect.
- 4 Capture everything on the same timeline.** A unified timeline by account is what makes triggering off the data in Convert clean. Without it, signals collide and the team second-guesses every action.

Repeatable plays you can run inside Capture.

Negative Signal Routing

When the system picks up a negative mention from an existing customer or a frustrated prospect (a critical comment, a complaint, a public competitor pitch), route it to Customer Success or leadership inside a hard SLA. Use the same listening that opens conversations to save relationships before they break.

Social Connection Mapping

Map every stalled or ghosted deal against the existing connections inside your company. Often there's already a path back in: a teammate who knows the buyer, a customer who can intro, an exec who shares a former employer. Pull the relational lever before declaring the deal dead.

Listen and Influence

Watch the influencers and thought leaders whose content aligns with your product. Who's commenting, sharing, asking questions on their posts? Those people are active and signaling intent. They may already be evaluating similar products. Engage them while they're still in evaluation, not after the shortlist closes.

Keyword Monitoring

Monitor social for the specific keywords and phrases your in-market buyers use: problem language, competitor mentions, evaluation requests. Posts using those keywords surface in a daily queue so reps reach out the same day the signal lands.

KPIS

Two numbers to watch.

- **Signals captured.** Total engagement signals flowing in across profile views, post engagement, comments, reposts, follows, and DMs.
- **Social-assisted revenue.** Revenue closed on deals where the prospect engaged with your content somewhere in the journey. The number that ties Capture to the business.

TECH STACK

● FirstTouch

Social signals into CRM
Or Trigify

● CRM

Attribution and account-level rollup
e.g. HubSpot, Salesforce, Attio

● Website deanonymization

Match anonymous visits to accounts
e.g. RB2B, Clearbit Reveal, Warmly

● Enrichment

Map profiles to account records
e.g. Clay, Apollo, ZoomInfo

Convert

Turn captured signals into conversations the buyer welcomes.

WHAT IT IS

Convert is turning the engagement Capture saw into real conversations: a connect request, a relevant DM, a meeting booked. It's where Create's audience and Capture's signal cash in.

WHY IT MATTERS

LinkedIn isn't email. You get one profile, it has finite daily capacity, and the buyer can see exactly how you treat them. Treat it like an email blast and you burn the channel. Treat it like a relationship and conversion compounds.

HOW YOU DO IT

Three tiers of outreach, in order of trust.

Tier 1: High-trust audiences first

Start here for new profiles, inactive profiles, and any rep ramping up. The warmest people the rep has any claim to.

- 1 Build the audience from real relationships.** Inbound signups, demo requests, new customers, event attendees, referrals.
- 2 Send connection requests with a short human note** tied to the actual moment.
- 3 Don't ask for a meeting in the first touch** unless intent is explicit.
- 4 Use replies and accepts to build profile health** for the harder outreach later.

Tier 2: Signal-based outreach

Once Capture is feeding a steady stream of signals, this is where the highest reply rates live. The buyer just did something. The message references it.

- 1 **Prioritize people who took an action.** Engaged with a post, viewed a profile, hit the pricing page, changed jobs.
- 2 **Reference the signal naturally** in the message. Talk about the topic, not the tracking.
- 3 **Lead with value, not a meeting ask.** Earn the meeting in the second or third message.
- 4 **Route warm responses inside SLA**, with full context attached to the task.

Tier 3: ICP list-based outreach

Only after Tier 1 and Tier 2 are running. The cold layer: tight, filtered, and optimized for connection acceptance.

- 1 **Build tightly filtered ICP lists** by persona, company size, industry, and title.
- 2 **Optimize for connection acceptance, not meetings.** Accepts pull people into the content orbit.
- 3 **Let later signals escalate the conversation.** Wait for engagement before asking for a meeting.
- 4 **Stay within profile capacity.** Never at the expense of Tier 1 or Tier 2.

PLAYS

Repeatable plays you can run inside Convert.

Speed to Lead

Any high-intent signal (demo request, pricing page visit, ICP comment on a post) routes to the right owner within hours, with full context and a recommended next touch. Speed compounds with relevance.

Pipeline Acceleration

On every active opportunity, identify the full buying committee. Multi-thread with executive connections, engage on each stakeholder's recent activity, and share matching proof in the days before the next meeting.

Post Engagers

Anyone who comments on or engages with your team's posts gets routed for follow-up the same day. The engagement is the warm thread. Reference it and lead with value, not a pitch.

Target Account Outreach

Tightly filtered ICP lists worked in tiered cadence. Each rep runs a mix of Tier 1, Tier 2, and Tier 3 daily so warm pipeline compounds while cold capacity stays within profile health.

KPIS

Three numbers to watch.

- **Connection acceptance rate.** Are the right people letting you in? Healthy profiles run well above the platform average.
- **Reply rate.** Of the people you reach, how many engage back. The clearest read on whether your outreach feels like continuation or interruption.
- **Pipeline created.** The dollar volume of opportunities sourced or influenced by Convert touches. The number that ties Convert to revenue.

TECH STACK

● FirstTouch

LinkedIn workflows and outreach

Or HeyReach

● CRM

Triggers and segments

e.g. HubSpot, Salesforce, Attio

Champion

Make customers the company's loudest distribution channel.

WHAT IT IS

Champion is what you do after the deal closes. Turn customer wins, advocates, and public mentions into the company's next wave of trust. The best companies don't write their own marketing anymore. They build systems that let customers do it.

WHY IT MATTERS

Customers say things you can't credibly say about yourself. Buying committees trust customer language over vendor language. AI search models cite customer-published content more often than vendor-published content. Champion generates trust at zero marginal cost, if you operationalize it.

HOW YOU DO IT

Three simple moves.

Operationalize customer-led content

The job is to catch the moments customers would naturally want to share, make publishing effortless, and amplify what they post.

- 1 Detect the moment.** A product milestone, a win, a metric, an expansion, a renewal. Any signal worth celebrating becomes a trigger.
- 2 Make publishing effortless.** Ship the customer a short share template the same day. Caption options, the handle, the hashtag, a graphic. Under 5 minutes from idea to posted.
- 3 Amplify what they post.** Reshare, comment, tag back. The customer's post is the primary content. Your job is amplification, not announcement.

Repeatable plays you can run inside Champion.

Milestone-Triggered Share

When a customer hits a meaningful milestone in product (first launch, first metric target, completed onboarding, hit a usage threshold), automatically trigger a play that sends them a share template the same day.

Executive Spotlights

Founder and executive accounts focused on elevating your customers: reposting, engaging with, and amplifying their content. The company feed becomes a stream of customer proof, not vendor announcements.

Webinars

Invite customers to share their wins live and repurpose the recording into a stream of social content. Option to co-brand the event and collaborate on follow-up posts, clips, and snippets.

Customer Post Incentives

Reward customers who post about your product publicly. Credits, swag, leaderboard spots, named recognition, recurring perks for top posters. The incentive makes the publishing repeatable.

KPIs

Two numbers to watch.

- **Customer-published posts per month.** The volume of content customers are putting out about you.
- **Inbound from customer content.** DMs, demo requests, and AI citations sparked by customer-tagged content.

TECH STACK

● FirstTouch

Detect and amplify customer wins

● CRM

Customer ownership and milestones
e.g. HubSpot, Salesforce, Attio

● Product analytics

Powers milestone triggers
e.g. PostHog, Amplitude, Mixpanel

● Customer support tool

Tickets and NPS as input signals
e.g. Pylon, Intercom, Zendesk

● Webinar platform

Customer-led sessions
e.g. Contrast, Goldcast, Demio

● Team chat

Coordination and surfacing plays
e.g. Slack, Microsoft Teams

Run the loop and the market compounds in your favor.

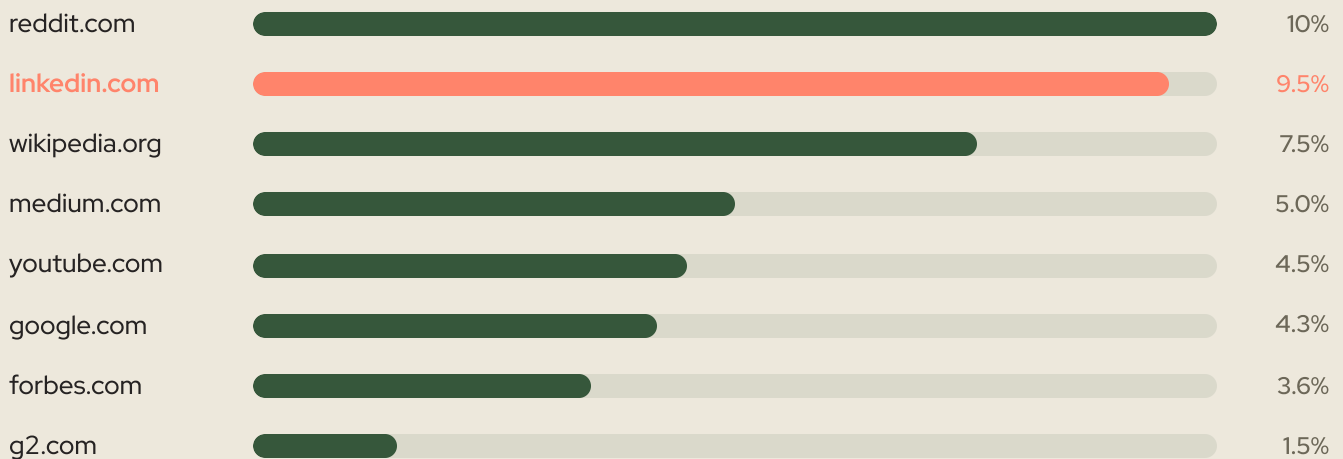
High-quality content plus customer-generated proof creates an unfair advantage in two places at once.

AI search starts citing you. Generative engines pull from sources with citation density, real expertise, and customer-validated language. Run the loop and you become one of those sources, in the answers buyers see before they ever click through.

Your reach compounds. Every post earns followers. Every customer win becomes net-new awareness you didn't pay for. Every comment by a teammate puts the brand in front of an audience that wasn't yours yesterday.

WHERE AI SEARCH PULLS FROM

Top-cited domains in LLM responses (ChatGPT, Google AI Mode, Perplexity). LinkedIn is the #2 most-cited source on the entire web.



Source: Semrush study of 230K prompts, October 2025.

The teams that operationalize Create, Capture, Convert, and Champion don't grow linearly. They grow exponentially, because every motion makes the next one easier and the entire motion tilts the market in your favor.

Run this loop weekly. The channel compounds.

Use this as the heartbeat for the program. If any one piece is missing, the loop breaks and the channel reverts to noise.

BARE MINIMUM TO GET IT RUNNING

- 3 posts a week.
- 10 comments a day.
- 10 DMs a day.

Ready to operationalize social on your team?

The playbook is the map. FirstTouch is the system that runs it.

SEE FIRSTTOUCH IN ACTION

firsttouch.com/demo

READ THE METHODOLOGY

firsttouch.com/operationalize-social

FROM THE FOUNDERS

Jared Mintzlaff

Co-Founder & CEO

Michael Kurson

Co-Founder & Head of GTM