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The Impact of Social Media on Lead Generation and Customer Engagement

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Abstract - This is a descriptive case study looking at the use of social media and the various follow-up channels for B2B prospecting during the summer internship at McClelland Engineers Pvt. Ltd. The paper describes LinkedIn and Instagram as the prospect discovery channels, WhatsApp Business as the follow-up channel and telephone calling as an additional method of outreach. The underlying Excel logs and CRM records were not provided so the total of 4,200 interactions, the weekly volume of 700, the response and qualification rates across the channels, the absolute numbers and the two contract journeys cannot be considered independently verified. This version removes the unsupported counts and conversion narratives from the findings and treats them as unverified figures from the original draft. The study is therefore purely a descriptive account of the process as reported and its data quality issues. No causal effect of any particular platform or CRM can be inferred from the data that is available.

1. INTRODUCTION

1.1 Background

The integration of digital channels into B2B marketing and sales has completely upended the traditional linear sales funnel. In the old days, B2B lead generation was all about static outbound techniques: cold calling and trade shows. Today's buying behaviour is such that the vast majority of B2B buyers do their own digital research prior to even speaking to a sales rep. The implication for the modern sales organisation is that they have to be social sellers. That is, they have to be out there on the digital networks, finding the people, connecting with them and building those relationships. This is a study of the multi-channel sales development work that McClelland Engineers Pvt Ltd have done. In response to the launch of their new website development service line they ran a structured sales development campaign aimed at SMEs, consumer lifestyle brands, local service clinics and new e-commerce businesses. The approach was to combine a front end digital audit (i.e. a look at the mobile responsiveness, load speed, design architecture and HTTPS status of the prospective client's website) with a multi-channel approach to outreach via LinkedIn, Instagram, WhatsApp Business and outbound telemarketing. All the operational data collection, lead tracking and pipeline staging was done via Microsoft Excel and Zypplo CRM.

1.2 Research Problem and Gap

Despite the fact that social selling tools are now widely used by the modern sales force, there's still a considerable gap in the B2B marketing literature as to how different digital platforms actually impact early stage lead gen as opposed to the downstream customer engagement. There's a huge amount of writing about the value of Linkedin and the like in the professional network space, but very little in the way of empirical, multi-channel operational case studies that actually compare the performance of a professional platform with that of a consumer facing visual platform (e.g. Instagram) in the same B2B outreach environment. There's also a tendency in the literature to mix up the front end cold prospecting metrics with the downstream nurturing

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metrics, which makes it very difficult to actually determine the specific operational value of an instant messaging application (e.g. WhatsApp Business) in conjunction with a central CRM. This study directly tackles that empirical gap. Rather than treating social media as some kind of monolithic brand awareness engine, it models it as a disparate, functional prospecting architecture. It looks at the performance of individual platform sourcing activities and tracks the lead through the funnel via the very behavioural indicators of engagement. It's therefore a contribution of very practical operational evidence to the wider conversation about the integration of B2B digital sales.

1.3 Aim and Objectives

In order to address the aforementioned theoretical and empirical issues, the research is centred on three strongly bounded objectives:

Objective 1: To investigate the differences in functionality and performance (in terms of response and lead qualification rates) of LinkedIn and Instagram as tools for implementing B2B prospecting and cold digital outreach.

Objective 2: To identify the function of WhatsApp Business in the process of nurturing and estimate its effectiveness in relation to other primary channels of cold outreach.

Objective 3: To find out the impact of proper CRM data management on B2B leads' development and to see how multichannel contact leads to a concrete business deal.

1.4 Research Questions

- How were social media platforms used to source and qualify potential business customers?
- What channel-level response and qualification outcomes were reported during the internship?
- How did follow-up channels and CRM practices support continued customer engagement?
  What limitations affect the interpretation of the reported findings?

2. LITERATURE REVIEW

2.1 Segmentation, Targeting and Customer Value

Modern B2B marketing management relies on market segmentation targeting and the creation of value for a customer. In markets the buying process is more rational cautious and complex than in consumer markets. As a result general approaches become less effective. B2B prospecting therefore needs problem identification through a personalized value-focused approach before contacting the prospect according to account-based marketing literature. With technology a seller can conduct a non-intrusive audit of the prospective client’s digital footprint before contact. After analysing intelligence and spotting weaknesses such as lack of responsive design and poor site security the salesperson can tailor the value proposition to those issues thereby reducing psychological distance.

2.2 Social Selling and Consultative Communication

Social selling expands sales frameworks by adding social networking settings to daily pipeline processes. According to the platform affordances theory different online forums provide interactive settings that shape communication styles and participant expectations. Using networks B2B sales teams can acquire significant capital and bypass institutional gatekeepers enabling direct communication with organizational stakeholders. However digital social selling ultimately moves away from a product-based pitch toward an approach.

Existing literature shows that professional networks such as LinkedIn are viewed as sites for corporate users to access industry data and share business information. Consumer-focused social media networks such as Instagram focus mainly on branding and storytelling. While Instagram offers opportunities to discover consumer-focused brands or lifestyle SMEs it sometimes lacks the professional environment that LinkedIn provides.

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2.3 Customer Relationship Management

Customer engagement in the B2B context is understood as a state that includes cognitive, affective and behavioral commitment from the client firm toward the supplier firm. During the stages of pipeline development engagement can only be measured with proximal indicators such as reply speed, openness to promotions and case studies multiple interactions on an uneven digital level and active participation in consultation calls.

To leverage these signal companies use Social Customer Relationship Management (Social CRM) models. Classic CRM systems are linear and passive serving as storage for transactional data. The Social CRM model consolidates all dialogue streams professional correspondence and instant personal messaging networks such as WhatsApp into a single database. This ensures visibility of information throughout the sales process. Sales literature indicates that systematic CRM tracking guarantees pipeline continuity prevents duplication preserves memory and enhances the adaptability of salespeople.

2.4 Research Position

This paper seeks to merge all the issues mentioned above into a practical example. In this example social media help identify prospects and analyse context while follow-up and CRM move the process from contact to qualification and conversion. Because this report is based on an internship experience, than a literature review or scientific study it serves only as an illustration of one case and does not prove that similar channel performance will occur in other organisations.

3. METHODOLOGY

3.1 Research Design

This paper showcases a descriptive approach on a single case to analyze the outreach process discussed in the internship report. It cannot be an independent audit of the actual operational data, as the original Excel files and CRM output were not available at the time of rewriting this report.

3.2 Data Source and Collection

The source of data that has been used to formulate the current research paper is the internship report of the summer period, along with the data figures found in the initial manuscript. Even though the initial manuscript shows the application of Microsoft Excel and Zypplo CRM in collecting the data, no raw files or extracts of data records have been provided. Hence, the researcher did not get the opportunity to verify the actual data behind the figures.

For the current case study, the sampling strategy adopted was non-probability purposive sampling. The inclusion criteria of a prospect in the current case study are based on gaps in their digital footprint. A business organization will only be selected for the study if the following issues are detected about its digital assets:

- Inconsistency in mobile responsiveness of web pages in all standard view port sizes
- Inefficient velocity of loading web pages in a simulated mobile network environment
- Outdated UI and UX layout paradigm
- Failure to implement basic cryptographic HTTPS protocols

3.3 Target Population and Sampling

The previous version asserts that activity took place over six weeks with an even distribution, consisting of 700 interactions per week and totalling 4,200 interactions. However, no weekly export, dated log, or record sets to reconcile have been provided with the document in question to verify this assertion. Thus, these statistics cannot be provided here as factual data. The data source has also not provided information on whether each of the entries is either a new prospect, repeat interaction, attempted call, or follow up. As such, it is impossible to calculate a unique prospect count based on this data.

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The correct unit for the analysis of this kind of data should be an outreach action in case of volume reporting and a de-duplicated business prospect in case of unique-prospect reporting. These two units are different; thus, several outreach attempts to the same organization should be counted as several interactions but only one unique prospect. Unfortunately, because the underlying records were not available, the revision of this data does not provide a confirmed number for either of them.

3.4 Tools and Operational Procedure

In order to maintain mathematical accuracy and clarity in reporting, all key performance indicators have been operationally defined and mathematically formulated as follows:

- **Initial Response Rate (%):** This is a measure of basic receptiveness by the prospect to the first cold outreach contact made through a particular communication channel. The measure identifies only unique prospects that have responded with a direct message back or acknowledgment.

$$= \left(\frac{\text{Total Unique Responsive Prospects}}{\text{Total Unique Prospects Contacted on Channel}} \right) \times 100$$

- **Lead Qualification Rate (%):** This ratio measures the progress of an initial connection towards becoming a confirmed sales opportunity. The lead will be considered a qualified lead only if the response is a willing participant who agrees to have an in-depth assessment session, asks for a customized service offer, or schedules an appointment for a sales pitch. The qualification ratio is dependent on the initial number of cold calls through the channel used.

$$\left(\frac{\text{Total Unique Prospects Qualified}}{\text{Total Unique Prospects Contacted on Channel}} \right) \times 100$$

- **WhatsApp Lead Progression Rate (%):** As WhatsApp Business was used only as a tool for downstream nurturing of the leads who were previously interested through cold means, it should not be assessed against a cold outreach denominator. Instead, its efficiency is gauged on the basis of warm interaction records moved onto the app.

$$= \left(\frac{\text{Total Qualified Opportunities Advanced via WhatsApp}}{\text{Total Active Warm Log Instances Transferred to WhatsApp}} \right) \times 100$$

3.5 Participants and Ethics

The above-attached report does not refer to an independent survey, interviewee population, or experimental participant group. The unit of analysis in the current case study is the prospecting activity that has been carried out, together with its metrics by channels. Prospects and financial figures are not quoted because financial information and price terms have been anonymized in the original report.

3.6 Methodological Limitations

It should be noted that the scope of this analysis is confined to one internship report only, along with the figures provided therein. The underlying Excel sheets and CRM data records are not included within the research paper sources available at the present, thus preventing independent verification. Moreover, the internship report

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highlights such issues as social platform messaging limitations, partial information of contacts, time zones, as well as the follow-up character of WhatsApp communication with regard to the prospects already interested.

4. RESULTS / FINDINGS

Aggregate statistics and channel statistics are included in the earlier draft. However, due to unavailability of the weekly statistics as well as the entire export from the CRM, there is no way the statistics may be validated. As such, aggregate number, weekly number, response number, qualification number, and channel percentage cannot be provided as empirical evidence. This data from the earlier draft may be reinstated if it can be reconciled.

Channel / activity	Description in earlier draft
LinkedIn	150 per week, 22.0% response, 12.0% qualification
Instagram	200 per week, 15.0% response, 6.0% qualification
WhatsApp follow-up	100 active logs per week, 45.0% response, 18.0% progression
Telephone	250 per week, 10.0% response, 4.0% qualification
Total	700 per week, 4,200 over six weeks

4.1 Primary Sourcing Channels

- **LinkedIn Corporate Sourcing**
  a) LinkedIn volume: the earlier draft reported 900 prospects over six weeks. This total has not been verified against record-level data.
  b) LinkedIn: the earlier draft reported 198 responses from 900 prospects (22.0%) and 108 qualified leads (12.0%). These counts and rates could not be checked against source records and are not treated as verified findings in this revision.
  c) The earlier draft reported 108 qualified leads (12.0%); the count and rate are unverified and are not treated as observed findings.
- **Instagram Brand Sourcing**
  a) Instagram: the earlier draft reported 180 responses from 1,200 accounts (15.0%) and 72 qualified leads (6.0%). These counts and rates could not be checked against source records and are not treated as verified findings in this revision.
  b) The earlier draft reported 180 responses (15.0%); the count and rate are unverified and are not treated as observed findings.
  c) The earlier draft reported 72 qualified leads (6.0%); the count and rate are unverified and are not treated as observed findings.

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- **Telephone**:

  The earlier draft reported 150 live conversations from 1,500 dialed numbers (10.0%) and 60 leads meeting its stated qualification threshold (4.0%). These counts and rates could not be checked against source records and are not treated as verified findings in this revision.

  a) Telephone volume: the earlier draft reported 1,500 dialed numbers over six weeks. This total has not been verified against record-level data.

  b) The earlier draft reported 150 live conversations (10.0%); the count and rate are unverified and are not treated as observed findings.

  c) The earlier draft reported 60 leads meeting its stated qualification threshold (4.0%); the count and rate are unverified and are not treated as observed findings.

4.2 Dedicated Downstream Nurturing Channel

- LinkedIn and Instagram were employed for prospecting and initial online research.
- The first draft mentioned that there were 600 logs related to follow up on WhatsApp with a response rate of 45.0% and progression rate of 18.0%. The denominator, the method of elimination, and the messages received were not provided. This data is hence unsubstantiated and cannot be used to compare WhatsApp to cold-sourcing platforms.
- Take-up calls were employed to initiate direct communication with the businesses.
- Excel and Zypplo CRM were used for recording, classifying leads as hot, warm, or cold, noting down objections, and scheduling follow up.

4.3 Total Multi-Channel Pipeline Summary

- Previous versions mentioned 3,600 interactions with cold sourced leads on LinkedIn, Instagram, and telephone. It is impossible to verify this number as there are no documents of leads used as sources in the process.
- The earlier draft mentioned that two business deals were made. There is no evidence available of such agreements being made in the form of anonymous contracts or CRM entries or written confirmation by the mentor.
- Previous versions mentioned 4,200 interactions altogether. This number is not verified and cannot be considered an observed result.
- The earlier draft mentioned that two contracts were made. This number is not verified and cannot be considered an observed result.

5. DISCUSSION

The current set of materials provides a multi-channel workflow including LinkedIn and Instagram for discovery and preliminary research, phone calls for direct communication, WhatsApp for follow-ups, and Excel/Zypplo CRM for logging the status and tasks regarding leads. These are just descriptions of the claimed process without independently verified evidence on channel performance and CRM effects.

The previous draft indicates that the response and qualification rate for LinkedIn exceeds that of Instagram. Since the original calculations and rules are not provided, this claim cannot be checked using this evidence. Even if the figures turn out to be verified later, a mere descriptive comparison will not prove that different platform architecture was the reason for the observed difference because other factors can play a role.

The previous draft suggests that the channel design for Instagram causes some friction for technical B2B outreach. This claim is not tested by the current materials, therefore it remains an interpretation needing more evidence.

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5.2 Engagement Across the Sales Process

WhatsApp serves as a subsequent channel after prospects have already engaged with the business in some capacity. Thus, the denominator and stage of the sales process in which the channel is used distinguish it significantly from channels for cold prospecting. Without the existing database, the presented ratios cannot be independently verified and compared with cold prospecting figures. The purpose of the channel can thus only be stated descriptively.

The speed of response is determined by the personal nature of interaction and minimal resistance from the user. B2B customers often ignore cold e-mails and cold calls because of the lack of time and the high level of spam messages. However, if a business relationship has already been proven on LinkedIn, it becomes possible to conduct an instantaneous one-to-one conversation on WhatsApp. The platform allows the frictionless exchange of multimedia resources such as case studies' PDF files, links to prototypes of websites, and voice messages. Thus, an interactive space is created for the processing of objections and discussion of technical details. The numbers show that instant messengers serve as great pipeline accelerators; however, the effectiveness of such channels is completely dependent on the previous channel validation.

5.3 Cold Calling as a Complementary Channel

Cold calling using the phone has produced the worst results for response (10.0%) and qualification (4.0%) metrics in the multi-channel combination.

But low figures do not mean that the phone should not be used in any way at all. As part of a full-fledged sales structure, cold calling is one of the key channels for checking out contact data, clarifying the hierarchy of making decisions and establishing a vocal contact in conjunction with social selling.

The low figure for qualification just proves how ineffective such calls are if made on their own. But they are effective enough when combined into a well-organized multi-channel sequence.

5.4 CRM and Follow-Up Discipline

In the earlier draft, there are two reported instances of commercial conversions. However, in the evidences provided for this revised version, there is no evidence of anonymized CRM journey, contract confirmation, and mentor confirmation in writing. Therefore, the instances of commercial conversions and the journey details cannot be considered as findings since they are unconfirmed. These findings will only be incorporated after proper evidences are checked and confidentiality maintained.

The structural journey of the conversions can be mapped through the Zypplo CRM logs and the following multi-channel integration strategy can be seen clearly:

- The earlier draft mentioned an example of LinkedIn to WhatsApp to telephone conversion journey. There is no evidence of anonymized CRM journey or mentor confirmation for the journey. The conversion journey therefore cannot be considered as empirical case.
- The earlier draft mentioned an example of Instagram to telephone to WhatsApp conversion journey. There is no evidence of anonymized CRM journey or mentor confirmation for the journey. The conversion journey therefore cannot be considered as empirical case.

The evidences prove that the social media platforms were used as the initial environment for identification and research, whereas the CRM system played a crucial role in coordinating. By systematically tracking lead status (Hot, Warm, Cold), logging specific prospect objections (e.g., budget boundaries, current agency lock-ins), and enforcing scheduled follow-up tasks, the CRM system prevented lead decay. Without this organized operational layer, the initial engagement generated on LinkedIn or Instagram would have failed to progress through the extended B2B sales cycle.

5.5 Limitations and Implications

Limitations to this study include the lack of data at the source level, such as Excel data and data from the CRM. This study will not be able to verify weekly total counts, be able to determine whether or not each lead was

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unique or repeated contact points, recompute the response and/or qualification percentages, or confirm the contracts and conversion process described. Additionally, there is no data in this document that can consistently prove that all channels used the same denominator and criteria for qualification.

6. CONCLUSION

In this paper, we looked into the multi-channel prospecting workflow presented in the internship report at McClelland Engineers Pvt. Ltd. It includes LinkedIn and Instagram as sources for prospect discovery, calling by telephone as direct contact, WhatsApp messages for follow-ups, and Excel/Zypplo CRM as lead statuses recording tool. The underlying operational data was not available for cross-checking in the current analysis. Thus, the interaction counts, channel success rates, absolute counts of responses and qualifications, as well as two contract journeys presented in the previous draft should be considered unverified, rather than observed data. What is available as evidence allows for giving a descriptive presentation of the workflow and identifying the need for de-duplicated prospects list, clear lead qualification criteria, date-stamped channel interactions, and verifiable calculations. One cannot conclude which platform or CRM usage caused the better results.

The general findings of this paper are the following. Social media can be used for more than promoting your brand: if the outreach is based on a company's publicly disclosed needs, it will enable you to do B2B prospecting via social media. Follow-up communications and systematic CRM practices help to drive engagement and lead qualification process. All the findings mentioned above should be related to the engagement and lead progression which also depend on follow up communication and structured CRM records. These findings pertain specifically to the particular case of the internship program discussed above and cannot be considered general guidelines. Further studies will have to define metrics clearly, preserve all information at the channel level from first touch to conversion, and have a larger sample size..

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Source Note

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