HOW TO ANALYZE YOUR MARKETING IN HUBSPOT

WHAT IS HAPPENING?

STEP 1: Log into HubSpot and go to your Marketing Dashboard. This displays the most top-level information, giving your team a quick glance at how your website is performing.

STEP 2: Focus on your **Visit-to-Lead** and **Lead-to-Customer** conversion rate.

Compare your marketing performance to:
- Your previous month
- Your three month average
- Your goals
- HubSpot's Top 25% & Median

STEP 3: Identify which conversion rate is seeing the most success and which you need to improve upon.

ASK YOURSELF: Has one conversion rate been on a downward trend? Is one farther from the goals you've set? Is there one much further below the HubSpot median?

If you don't have any previous data to refer to, in general your website should be converting at least 1-2% of traffic into leads.

I need to improve my visits-to-lead conversion rate.

I need to work on improve my lead-to-customer conversion rate.

WHY IS THIS HAPPENING?

STEP 1: Go to your Sources Report. While the Dashboard gives you a high level overview, the Sources Report gives you an in-depth look at which channels are generating traffic, new contacts and customers.

- **Change the time period** criteria to "All Time" or "Rolling Date Range of the past 6 months"
- **Check off** "Show Visits-to-Contacts" rate

STEP 2: Compare conversion rates for individual sources to your overall average. We are looking for outliers.

ASK YOURSELF: Which source(s) has a below average visit-to-lead conversion rate?

WRITE DOWN: Top two sources that are generating traffic, but not converting visits into leads. Then, find that source below to learn what you can do to improve this.

Note: If you want to improve the overall conversion rate of your website, start with Organic Traffic.

STEP 1: Go to your Contacts and Lists tools. Evaluate the quality of your leads. If you're converting visitors into lead, but not converting leads into customers, it could be that you aren't attracting the right contacts.

STEP 2: Go to your Workflows tool.

ASK YOURSELF: Do you have lead nurturing workflows set up to help move your leads down the funnel? Are your workflows converting contacts to your Goal List?

DOES ORGANIC TRAFFIC HAVE A BELOW AVERAGE VISIT-TO-LEAD RATE?
- YES → GO HERE
- NO

ARE YOU GENERATING QUALIFIED LEADS?
- YES
- NO → GO HERE

DOES SOCIAL MEDIA HAVE A BELOW AVERAGE VISIT-TO-LEAD RATE?
- YES → GO HERE
- NO

DO YOU HAVE NURTURING CAMPAIGNS?
- YES
- NO → GO HERE

DOES EMAIL MARKETING HAVE A BELOW AVERAGE VISIT-TO-LEAD RATE?
- YES → GO HERE
- NO

ARE YOUR NURTURING CAMPAIGNS CONVERTING LEADS INTO QUALIFIED LEADS AND THEN CUSTOMERS?
- YES
- NO → GO HERE

DOES PAID SEARCH HAVE A BELOW AVERAGE VISIT-TO-LEAD RATE?
- YES → GO HERE
- NO

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ORGANIC TRAFFIC

ORGANIC TRAFFIC ISN'T CONVERTING LEADS

Do you have conversion opportunities on your website?

YES → If you have conversion opportunities and your organic traffic is still converting below average, it could be one of (or a combination of) the following things.

Review the following aspects below to identify which actions to take.

NO → It's time to build out your first conversion path. Take advantage of content you already have and find opportunities for new content that will appeal to your buyer personas.

ACTION ITEMS:
- Take inventory of content you already have (e.g. newsletters, brochures, whitepapers, email correspondence) – Use the Content Audit Worksheet
- Map out any additional content you need to create for each persona as they move through the buyer's journey – Use a Content Mapping Template
- Build the conversion path – Create a landing page, thank you page and call-to-action for you offer.
- Promote your offer by putting the call-to-action on relevant blog posts and website pages and sharing your landing page on social media.

CTAs

Do you have calls-to-action on your blog posts and top viewed pages?

YES → Look at the Click-Thru-Rate of your Calls-to-Action. Are they under 2%?

NO → **ACTION ITEM:** Go to your Page Performance Report. Identify the top viewed website pages and blog posts. Ensure that each of these pages have a relevant call-to-action.

PRO TIPS:
- Put Awareness Stage CTAs at the bottom of blog posts.
- Put one Awareness Stage and one Consideration Stage CTA on blog sidebar.

ACTION ITEMS: If you CTAs are getting views, but no one is clicking on them, evaluate your CTA for best practices.

ASK YOURSELF:
- Is your CTA clear and consistent with your landing page?
- Is it appropriate in terms of the content offer and buyer's journey?
- Can you try out a different design?

PRO TIP:
- If you want to start designing CTAs with a more custom look and feel, here's 50 Pre-Designed CTAs you can customize in PowerPoint.

Landing Pages

Go to your Landing Pages tool. Evaluation the performance:
- For Awareness Stage offers, aim for a submission rate of 25% or greater.
- For Consideration and Decision Stage offers, aim for a submission rate of 15% of greater.

For low submission rates, do your landing pages follow best practices?
Here's a refresher of best practices.

YES / **NO** →

ACTION ITEMS:
- Optimize your landing pages so they follow all the best practices.
- Make sure they pass the "Blink Test" – Within a few seconds of viewing your landing page, you should be able to answer: 1) what the offer is, 2) why it benefits you, and 3) how you get it.

Do you have landing pages for each persona at each stage of the buyer's journey?

YES / **NO** → **ACTION ITEMS:**
- Take inventory of content you already have (e.g. newsletters, brochures, whitepapers, email correspondence) – Use the Content Audit Worksheet
- Map out any additional content you need to create for each persona as they move through the buyer's journey – Use a Content Mapping Template

Content

If you have CTAs and Landing Pages that are following the best practices and you're placing CTAs on your top viewed pages, but still seeing a below average visit-to-lead conversion rate, it could be that your offers are not resonating with your personas.

Have you created personas for your organization?

YES → Do you have content for each persona at each stage of the buyer's journey?

NO → **ACTION ITEMS:**
- Create personas and add them to your HubSpot tool.
- Take inventory of content you already have (e.g. newsletters, brochures, whitepapers, email correspondence) – Use the Content Audit Worksheet
- Map out any additional content you need to create for each persona as they move through the buyer's journey – Use a Content Mapping Template

YES → **ACTION ITEMS:**
- Consider a challenge your persona faces that you have not yet created content for in the Awareness Stage and build an inbound lead campaign around that offer.

NO → **ACTION ITEMS:**
- Take inventory of content you already have (e.g. newsletters, brochures, whitepapers, email correspondence) – Use the Content Audit Worksheet
- Map out any additional content you need to create for each persona as they move through the buyer's journey – Use a Content Mapping Template
- Then, create the conversion path for these offers.

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SOCIAL MEDIA

SOCIAL MEDIA ISN'T CONVERTING LEADS

Are you sharing your landing pages on social media?

YES

NO

Are your landing pages the <u>only</u> content you're sharing on social media?

YES

NO

ACTION ITEM: Start <u>sharing your landing pages</u> on social networks.

PRO TIP: It's easy to do this through the HubSpot <u>Social Publishing tool</u>.

- Each time you create a new landing page, schedule at least one social message for each network that links to your landing page.

ACTION ITEM: Start sharing other peoples content that your personas would find helpful.

- Follow the 60-40-10 rule – Share 60% of other's content, 40% of your own content, and make 10% your offers.

If you are sharing your landing pages, and additional content, on social media and it's still converting leads at a below average rate, it could be one (or combination) of the following elements.

Review the following aspects below to identify which actions to take.

Look in your Sources Report and Social Tool – Are there social messages that are getting more engagement than others?

YES

NO

Messaging

ACTION ITEMS: Identify any trends among your highest performing messages that you can implement into future campaigns.

- Look at social messages with the most clicks and interactions.
- See if there are any trends with the type of content, day/time you posted, etc...
- Repost most popular content.

ACTION ITEMS: If none of your messages are driving any engagement, revise the messaging to find something that works.

- Try asking questions.
- Add images.
- See what other leaders in your industry are doing on Social Media.

Dive in Deeper in your Sources Report – Are there social media channels in particular that are converting leads at a below or above average rate?

Audience

YES

NO

ACTION ITEMS:
- For channels that are <u>performing above average</u> – spend more time building up your following and activity on these networks. See if there's anything you're doing differently that you could implement on other channels.
- For channels that are <u>performing below average</u> – is this because your messaging isn't resonating with your persona, or because your persona isn't spending time on that social channel?

Content

If you are sharing your landing page on channels where you personas are spending time and implementing best practices into your messaging, and still seeing a below average visit-to-lead conversion rate, it could be that your offers are not resonating with your personas.

Have you created personas for your organization?

YES

NO

Do you have content for each persona at each stage of the buyer's journey?

YES

NO

ACTION ITEMS:
- <u>Create personas</u> and add them to your HubSpot tool.
- Take inventory of content you already have (e.g. newsletters, brochures, whitepapers, email correspondence) – Use the <u>Content Audit Worksheet</u>
- Map out any additional content you need to create for each persona as they move through the buyer's journey – <u>Use a Content Mapping Template</u>

ACTION ITEMS:
- Take inventory of content you already have (e.g. newsletters, brochures, whitepapers, email correspondence) – Use the <u>Content Audit Worksheet</u>
- Map out any additional content you need to create for each persona as they move through the buyer's journey – <u>Use a Content Mapping Template</u>
- Then, create the conversion path for these offers.

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EMAIL MARKETING

EMAIL MARKETING ISN'T CONVERTING LEADS

Are you promoting your landing pages through email?

- **YES**
- **NO**

NO →
ACTION ITEMS: Email is a great way to promote your content offers to existing contacts who would be interested.
- Create an email to promote your offer
- Include a CTA button that links to your landing page
- Send this to a list of contacts that would be interested in your offer

YES →
Do you encourage (and make it easy) for leads to share your email?
- **YES**
- **NO**

NO →
ACTION ITEMS: Encourage your contacts to forward your email to their friends and colleagues.
- Create a CTA encouraging your leads to share your content via email.

If you are promoting your landing pages through email, you're encouraging contacts to forward it to friends, and it's still converting leads at a below average rate, it could be one of the following elements.

Review the following aspects below to identify which actions to take.

Note: There are some actions you can take to generate new contacts through Email, however, it usually isn't going to be your biggest source of leads. If you want to improve your websites overall visit-to-lead rate, review the Organic Traffic suggestions.

Email Copy

Go a level deeper and see campaign data. Are there email campaigns that are performing better than others?
- **YES**
- **NO**

ACTION ITEMS:
Great! Are there any trends you notice among your top performing emails?
Look at:
- Subject line and body copy
- Format
- Topic
- Type of offer
- Day and time sent
- List of contacts
Incorporate your findings into future emails.

Do your emails follow best practices?
"Here's a refresher of best practices."
- **YES**
- **NO**

NO →
ACTION ITEM: Revise emails to follow best practices.

PRO TIPS:
- If you find that you're struggling with a low open rate, focus on revising your SUBJECT LINE.
- If you find that you're struggling with your CTR, focus on revising your EMAIL BODY.
- Give contacts at least 2 changes to take your desired action. For example, include a link to the landing page and a CTA button to the landing page.

Audience

Are you sending your emails to segmented lists of contacts?
- **YES**
- **NO**

NO →
ACTION ITEMS: Your email campaigns will be the most powerful if you send your contacts targeted emails that they will be compelled to read.
- Identify who you want to send your email to – ex: leads who are in a specific industry.
- Import these contacts or create a segmented smart list in HubSpot. Use this list for your email send.

PRO TIP:
- Help determine your contacts' interests by gathering intelligence from your existing leads and customers through questions you ask on your forms. This will help make sure you send your emails to the most relevant contacts.

Content

If you are promoting your offers through email and making it easy for contacts to share, and still seeing poor email performance, it could be that your content isn't resonating with your contacts.

Have you created personas for your organization?
- **YES**
- **NO**

NO →
ACTION ITEMS:
- Create personas and add them to your HubSpot tool.
- Take inventory of content you already have (e.g. newsletters, brochures, whitepapers, email correspondence) – Use the Content Audit Worksheet
- Map out any additional content you need to create for each persona as they move through the buyer's journey – Use a Content Mapping Template

Do you have content for each persona at each stage of the buyer's journey?
- **YES**
- **NO**

ACTION ITEMS:
- Take inventory of content you already have (e.g. newsletters, brochures, whitepapers, email correspondence) – Use the Content Audit Worksheet
- Map out any additional content you need to create for each persona – Use a Content Mapping Template
- Then, create the conversion path for these offers.

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PAID SEARCH

PAID SEARCH ISN'T CONVERTING LEADS

Are you sending your ad traffic to landing pages?

YES → **NO**

If you are sending your paid ad traffic to landing pages and paid search is still converting leads at a below average rate, it could be one (or a combination) of the following things.

Review the following aspects below to identify which actions to take.

ACTION ITEM: Start sending ad traffic to landing pages, and not website pages that don't have a form on them (like your homepage).

PRO TIPS:
• Use tracking URLS to help gauge the effectiveness of your PPC campaigns.

Do your landing pages follow best practices? *"Here's a refresher of best practices.*

YES   **NO**

Landing Page

ACTION ITEMS:
• Optimize your landing pages so they follow all the best practices.
• Make sure they pass the "Blink Test" — Within a few seconds of viewing your landing page, you should be able to answer: 1) what the offer is, 2) why it benefits you, and 3) how you get it.

Do your ads and landing pages have consistent messaging?

YES   **NO**

ACTION ITEM: Revise your landing page and ad text so that they have consistent messaging.

PRO TIP:
• Incorporate keywords that match your ad groups in your landing pages. For example, if you have ad group for "red tennis shoes," you'll want to include some of the keywords from that ad group in your landing page text.

Ad Copy

Do your ads include a CTA, such as "Sign Up"?

YES   **NO**

ACTION ITEM: Tell your viewers what to expect when you direct them to your landing page. If they are aware of what they should do when they get there, they'll be more likely to convert to a lead.
• Use words like "sign up," "get a free trial," "order," "try it free," etc...

Are you filling your ad copy with adjectives?

YES   **NO**

Are you using all your ad space available to you?

YES   **NO**

ACTION ITEM: Don't let your ads come across in a way that makes your company sound superlative.
• Use Ad Copy that explains the value of your offer tangibly and in a way that viewers can relate to.

ACTION ITEM: The design of your paid search ads can make a huge difference to your conversion rates.
• Make use of the 70 characters you have.
• Create excitement, include something timely or controversial, or somehow make your ad stand out. You should also leverage the display URL, which is not the same URL you direct your visitors to when they click.

PRO TIP: Always be testing your ads to help gather information to direct further campaign changes.
• Start by having three text ads in each ad group – one you're confident about, one that's similar to the first but somehow different, and one that's very different from those two.
• Run them for a couple weeks, then see what's performing well and what's not.

PRO TIP: Leverage the display URL, which is not the same URL you direct your visitors to when they click.
• You can make the display URL more prominent and relevant to a viewer.

Targeting

Are you targeting a specific, tailored audience?

YES   **NO**

Are you using single broad match keywords?

YES   **NO**

ACTION ITEMS: Typically, you don't want to target a wide area (especially if you're targeting a local or regional audience).
• Refer back to your persona information and use geo-targeting to specify exactly where you want your ads to be displayed. This will help improve the quality of who sees your ads.

ACTION ITEMS: These types of keywords are often actually irrelevant to your product or service, and as a result, they drive less targeted traffic and convert at lower rates.
• Use long-tail keywords – ones that are longer and set to either exact or phrase match. This will help define your reach more closely by keeping your keywords and ad placements geared towards viewers who are looking for what you're offering more specifically.

ACTION ITEM: If your ads, landing pages and targeting are all following best practices, but you're still not generating leads, try out a different offer.

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QUALIFIED LEADS

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┌──────────────────────────┐          ┌──────────────────────────────┐
│  YOU'RE NOT GENERATING   │─────────▶│  Have you defined what a     │
│    QUALIFIED LEADS       │          │  qualified lead is           │
│                          │          │  for your business?          │
└──────────────────────────┘          └──────────────────────────────┘
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YES   **NO**

ACTION ITEM: It's essential to determine what makes a qualified lead so you can be spending your time nurturing the right contacts.

- Define MQL and SQL properties - Write out what makes a qualified lead. Ex: Job Title, Location, Content Downloaded. Talk to your Sales team to get help!
- Create any new properties you need and add them to your forms.
- Build Smart Lists in HubSpot based on this criteria.

If you've defined what a qualified lead is and aren't seeing any of your contacts moving down your funnel, it could be one of (or a combination) of the items listed below.

Review the following aspects below to identify which actions to take.

PRO TIPS:
- Not sure where to start? Here's a list of 13 criteria you can use to grade leads.
- Don't forget that you can include segmentation by pages viewed, and email engagement.

Forms   Are you asking qualifying questions on your forms?

YES   **NO**

ACTION ITEM: Forms are a key opportunity to gain contact intelligence. Make sure you're asking questions that will help you provide more relevant content to your contacts, while also helping your sales reps.

- Hide previously completed fields - Ask new questions each time a contact fills out a form by using Smart Fields. This will help you keep your form short, while also learning more about your leads to determine lead quality.

Content   Do you have content at the Consideration and Decision Stage of the buyer's journey for each of your personas?

YES   **NO**

ASK YOURSELF:
- Are your promoting these offers in the right places?
- Are your landing pages and calls-to-action optimized?
- Are you attracting quality traffic to your website that could become high quality leads?

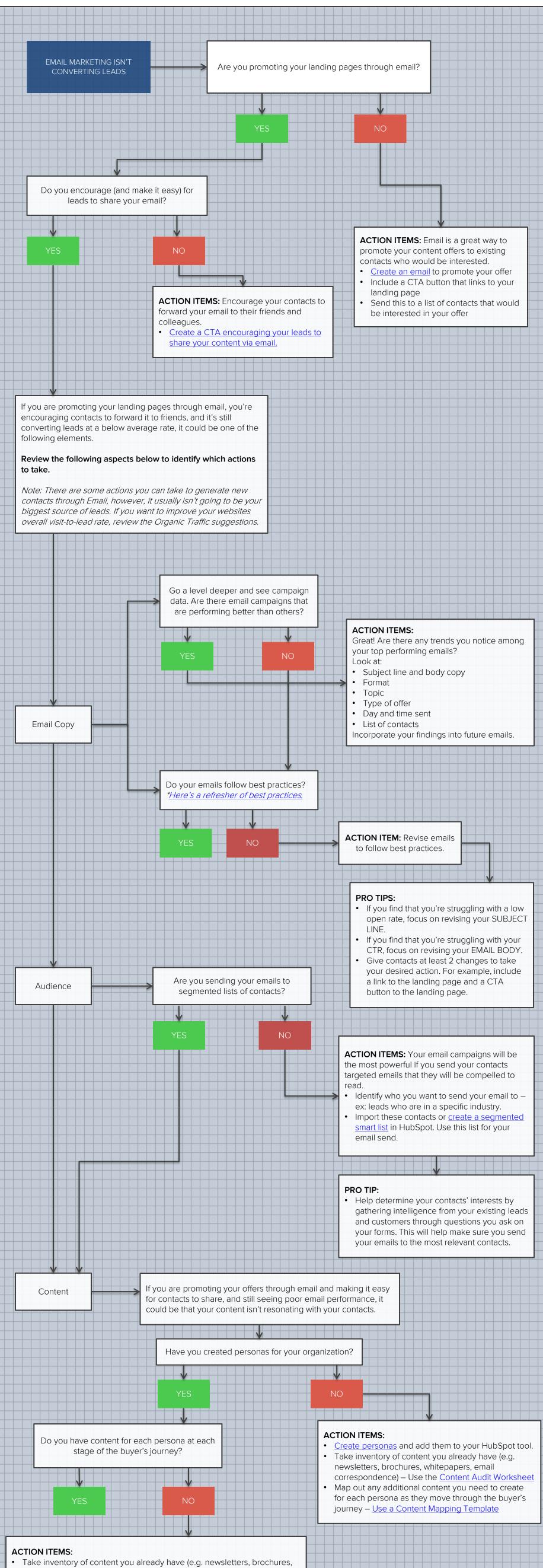**ACTION ITEMS:**
- Take inventory of content you already have (e.g. newsletters, brochures, whitepapers, email correspondence) – Use the Content Audit Worksheet
- Map out any additional content you need to create for each persona at the Consideration and Decision Stage – Use a Content Mapping Template
- Create a conversion path (landing page, thank you page and CTA) for these new offers. Place the CTA on relevant website pages and blog posts.

ACTION ITEMS:
- Make sure you're promoting your Consideration and Decision Stage offers on the most relevant pages on your website – look for places where contacts would be ready to become a more qualified lead.
- Review your Landing Pages for best practices.
- Review your keyword research and blogging strategy to ensure you're pulling in the right traffic to your site.
- Identify long-tail keyword phrases your personas would search related to your content offer.
- Write optimized blog articles around these keywords and add your CTA to the post. Blogging will attract people organically to your website so they can find the call-to-action for your content offer.

PRO TIP:
- Use Smart CTAs to show the most relevant offer to each contact and help move your leads down the funnel.
- For example, you can have a CTA dynamically change to show a Prospect an Awareness Stage eBook, a Lead a Consideration Stage Offer, a Marketing Qualified Lead a Consideration Stage Offer and a Sales Qualified Lead a Decision Stage Offer. Try putting these CTAs on your blog posts and top viewed website pages.

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IMPLEMENTING WORKFLOWS

YOU DON'T HAVE NURTURING CAMPAIGNS

If our goal is to move leads further down the funnel, do you have content for each persona at each stage of the buyer's journey?

YES

NO

ACTION ITEMS:
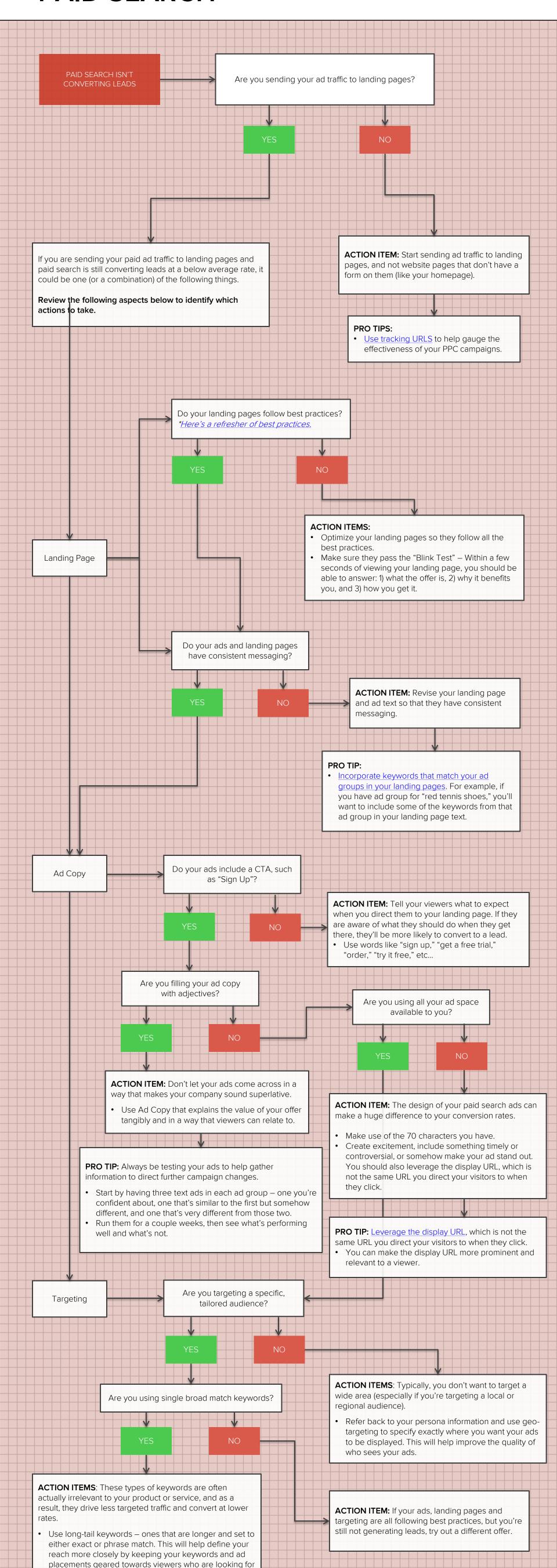- Take inventory of content you already have (e.g. newsletters, brochures, whitepapers, email correspondence) – Use the Content Audit Worksheet
- Map out any additional content you need to create for each persona as they move through the buyer's journey – Use a Content Mapping Template
- Build the conversion path – Create a landing page, thank you page and call-to-action for you offer.

Have you mapped out what your workflows will look like?

YES

NO

ACTION ITEMS: It's best to plan our your workflows before getting into the Workflows tool – Go through the following thought process to decide the actions and steps of your workflows:
- First, "What is the important action that a contact can take? What segment of your audience do you want to nurture?" This will be your starting condition.
- Based on this, "How do you identify them as a part of that segment? How do you know when they have (or have not) completed that action?" Create any custom properties you need.
- Now, "After having gone through the Workflow, where do you want them to be? What is the purpose of sending them more content and continuing to engage with them?" This will be your goal list.
- So, "What do we need to send them to help build a relationship with these contacts so they feel comfortable and see value in continuing to engage with you?" This info will make up the steps – for example, the emails that you send your contacts to encourage them to take an action further down the buyer's journey.

PRO TIP:
- Make sure your goal list is appropriate and not too far down the buyer's journey. For example, not every goal list will be "Customers" — you want to think of smaller goals, such as moving a lead to a MQL.

Have you created the lists for your workflow?

YES

NO

ACTION ITEMS: You need to create your starting list and goal list before you can create your Workflow.
- Based on your Workflows Mapping, create a Smart List for your starting criteria and a Smart List for your Goal List.

Have you created the emails for your workflow?

YES

NO

ACTION ITEMS: You need to create your emails before you can add them to your workflow.
- Create your automated emails that you mapped out.
- Make sure these emails follow all best practices. Nurturing emails needs to hit on three things: 1) Recognize what they have already done, 2) Introduce something new and 3) Anchor it with a call-to-action
- Include personalization in the email to make it very targeted to your list.

Have you determined the timing between your steps (emails)?

YES

NO

ACTION ITEM: Determine the time delays between your stages.

At each step, ask yourself, 1. "How much time will it take for a contact to digest this information before I send them something more?" 2. "At this point, are they ready to meet the goal of the Workflow?"

1. This will define timing
2. If not, what else can you send them?

PRO TIP: If you're totally unsure what delay to use between steps, start by waiting 7 days so that you're only sending one email per week.

Set up your Workflow

ACTION ITEM: Now that you've mapped out your Workflow and have the emails ready to go, it's time to set up your workflow.
- Create a new Workflow.
- Select your Starting List and your Goal List.
- Add your Emails and delays.

PRO TIPS:
- Add a Suppression list for any contacts who you never want to be enrolled in your workflow (ex: Customers).
- Test your workflow – Note: Make sure you use a test contact! When you test a workflow, that contact will receive all the actions immediately.

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OPTIMIZING YOUR WORKFLOWS

YOUR WORKFLOWS AREN'T CONVERTING

Do you have an appropriate goal list?

YES

NO

ACTION ITEM: If your Goal List has a low conversion rate, it could be that you're expecting too much from your contacts.

- You want to have a goal list for an attainable action. For example, you don't want to make "Customer" the goal list for every Workflow. Instead, you might have a Workflow that nurtures Leads to MQLs, then another workflow for MQLs to SQLs, and so on.

Do your Workflow emails have a low CTR and/or open rate?

YES

NO

ACTION ITEMS: Optimize your emails for best practices.

- Send your email from a real person – avoid using "noreply" and distribution emails
- Write a clear and compelling subject line
- Use actionable language
- Remember, all nurturing emails need to hit on three things: Nurturing emails needs to hit on three things: 1) Recognize what they have already done, 2) Introduce something new and 3) Anchor it with a call-to-action
- Use personalization tokens.

PRO TIPS:
- Improve your open rates by working on your subject line, trying out adding personalization, clarity, action-oriented verbs or questions
- Increase your click through rate by adding multiple chances for someone to meet the goal of the email (ex: adding a hyperlink and a CTA button to the landing page)

Are certain steps of the email performing better than others?

YES

NO

ACTION ITEMS: Review your Workflows Performance tab.

In your left-hand navigation, you'll find Performance. This screen displays how your workflow emails are performing, showing the delivered number and rate for each workflow email, the open number and rate, and the clicked number and rate. You'll also find how many churned contacts happened from these workflow emails (contacts who either unsubscribed from all emails or flagged an email as spam).

If you notice that there is a certain stage of the workflow that has less engagement, or more spam complaints, experiment with the timing between steps. It could be that you were sending too many emails to these contacts.

Go back to your personas and Content Mapping.

ACTION ITEMS: It could be that you just aren't sending the content that your personas need in order to move along further down the buyer's journey.

- Reevaluate your Content Mapping and brainstorm new offers that might be more helpful.
- Try sending out a survey to existing contacts and customers if you need to gather more intelligence.

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