

# HOW TO ATTRACT, CONVERT, AND CLOSE MORE CUSTOMERS



Question of the day at 1:55 pm ET.

The broadcast begins at 2:00 pm ET.

Use the Question Pane in GoToWebinar to Ask Questions!

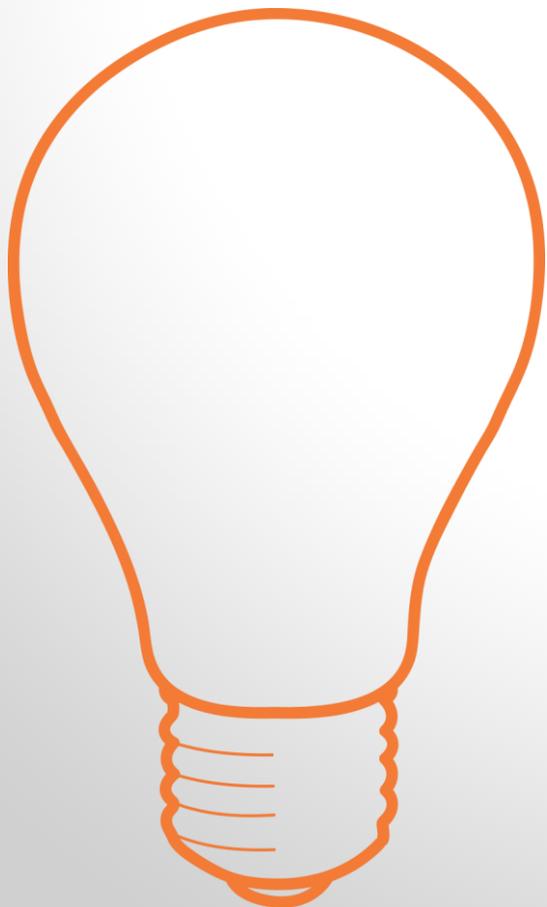
**1** Use the hashtag #InboundLearning on Twitter

**2** Question of the day



@HubSpotAcademy

#InboundLearning



Love HubSpot Projects?  
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# BROADCAST SCHEDULE

**3/17** – Website redesign strategy and link building projects

**3/24** – Survey and lead nurturing projects

The HubSpot logo is displayed in a blurred, light gray font on a white rectangular background. The word "HubSpot" is written in a sans-serif typeface, with the "o" in "Spot" replaced by a stylized orange icon consisting of a central circle with three lines extending outwards to smaller circles, resembling a network or a person with arms raised.

HubSpot

**Mark Kilens**

@MarkKilens



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# AGENDA

- 1 Why it's important to be executing projects
- 2 Lead nurturing workflow project
- 3 Survey project

# 1 WHY IT'S IMPORTANT TO BE EXECUTING PROJECTS

# Project:

Often collaborative, projects use multiple apps in HubSpot in a planned effort to achieve a particular goal or task.

# HOW PROJECTS WILL HELP YOU

- 1 Use HubSpot for a specific purpose and goal
- 2 Increase effectiveness of current inbound initiatives.
- 3 Use HubSpot to learn how the tools work together

# LEARN BY DOING

Step 3: Build relationships

LEARN HOW

Step 4: Find authoritative sites and industry thought leaders

LEARN HOW

Step 5: Create content with input from industry thought leaders

LEARN HOW

## TO-DO

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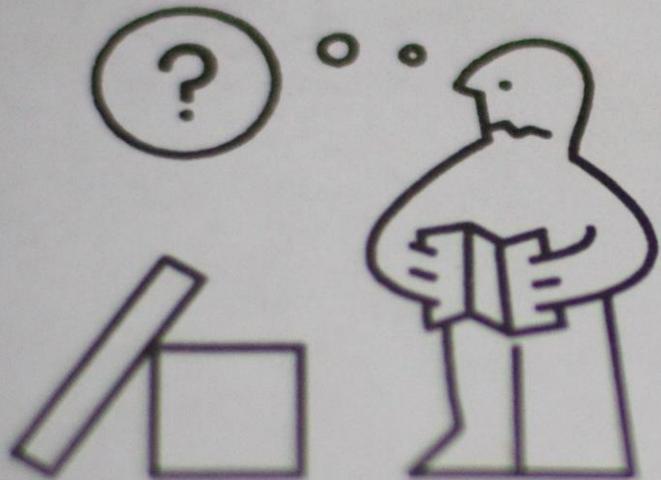
- 1 Create a "best-of" list or a resources list. Give credit to the sources or authors.
- 2 Conduct an interview with an industry thought leader and publish it as a blog post.
- 3 Create crowdsourced content.
  - a. Solicit information, answers or opinions on a particular topic from industry thought leaders.
  - b. Keep track of who responded and who did not for future use.
- 4 Ask an industry thought leader to write the forward for an eBook. Or simply ask them for a quote!

## PRO TIP

Not only will these thought leaders help you write your content, but they'll also help you promote it! You'll gain new visitors and a new link to your content.

Want other link-building content ideas?

[Read this blog post!](#)



# NEVER MISS A STEP

Our step-by-step walkthrough will guide you through the project.

# IMPROVE YOUR PLANNING + COMMUNICATION

We've broken down the steps, so you can plan and delegate responsibility easily.





# CREATE & MAINTAIN GOOD HABITS

Get in the flow of doing inbound projects and using HubSpot.

# REPEAT THE PROCESS

Come back to a project in the future – the steps will still be there!



# 2 LEAD NURTURING WORKFLOW PROJECT.



This project is for HubSpot Professional  
and Enterprise plans.

Do you currently **automate** any part  
of your lead nurturing strategy?

# LEAD NURTURING STATISTICS

**50% of leads** are qualified but not yet ready to buy. (Source: Gleanster Research)

Companies that excel at lead nurturing generate **50% more** sales ready leads at **33% lower cost**. (Source: Forrester Research)

Lead nurturing emails get **4-10 times the response rate** compared to standalone email blasts. (Source: SilverPop/DemandGen Report)

Nurtured leads produce, on average, a **20% increase in sales opportunities** versus non-nurtured leads. (Source: DemandGen Report)

Relevant emails drive **18 times more revenue** than broadcast emails. (Source: Jupiter Research)

**79% of marketing leads** never convert into sales. Lack of lead nurturing is the common cause of this poor performance. (Source: MarketingSherpa)

Jeff Ernst of Forrester Research, Inc., estimates that **only about 5%** of marketers use a full-featured marketing automation solution. (Source: Forrester Research)

Lead nurturing emails generate **an 8% CTR** compared to general email sends, which generate just a 3% CTR. (Source: HubSpot)

**LISTS**



**EMAIL**



**WORKFLOWS**

# BUILDING A LEAD NURTURING WORKFLOW

- 1 Decide who you want to nurture
- 2 Decide where you want to nurture them towards
- 3 Write your emails
- 4 Analyze your workflow



**DECIDE WHO YOU  
WANT TO NURTURE.**



Segmentation allows you to send the right people  
the right message at the right time.

**2**

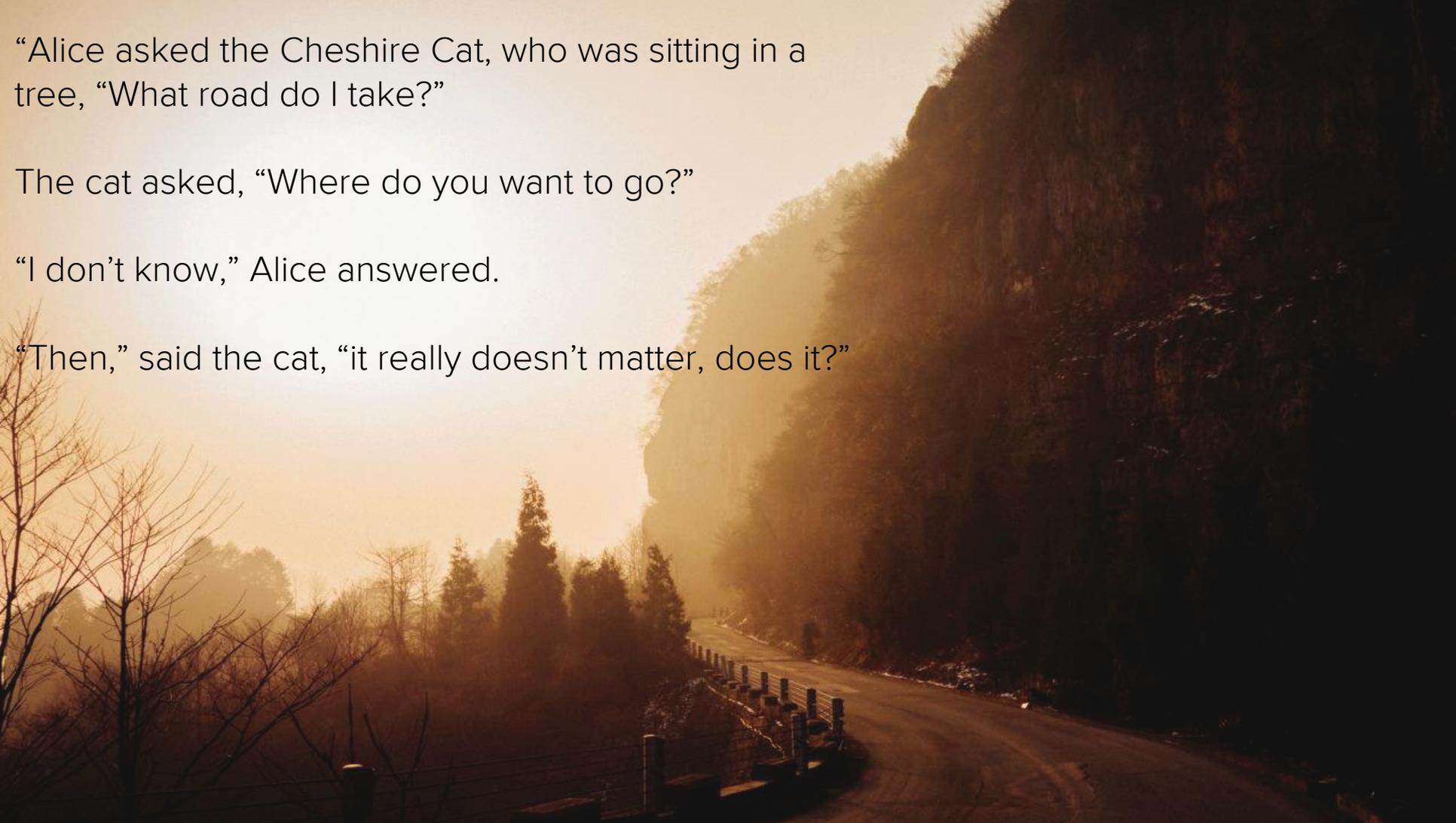
**DECIDE WHERE YOU WANT TO  
NURTURE YOUR LEADS TOWARDS.**

“Alice asked the Cheshire Cat, who was sitting in a tree, “What road do I take?”

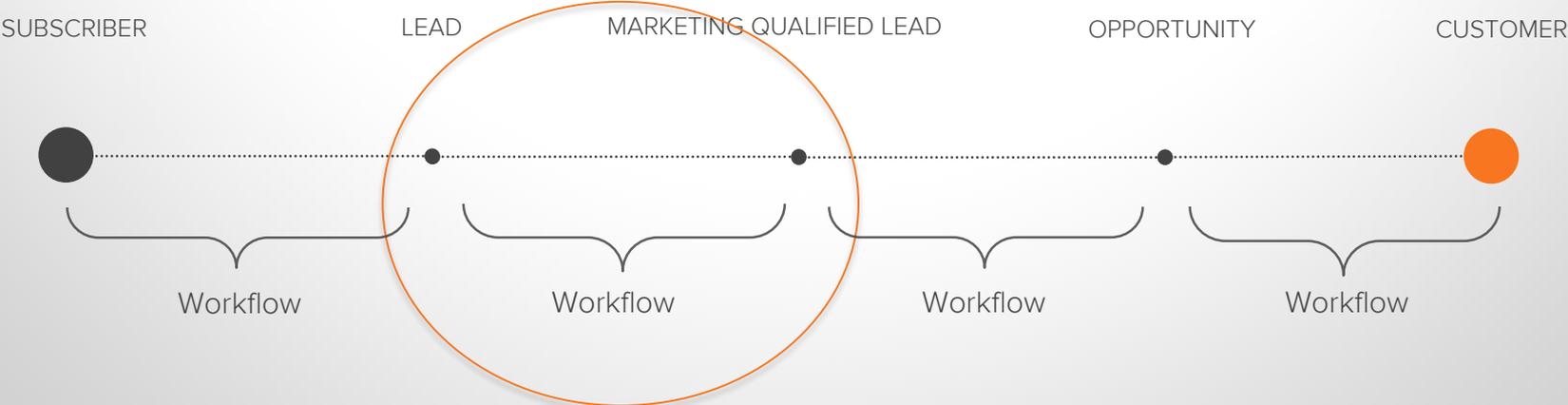
The cat asked, “Where do you want to go?”

“I don’t know,” Alice answered.

“Then,” said the cat, “it really doesn’t matter, does it?”



# SET WORKFLOWS GOALS SPECIFIC TO LIFECYCLE STAGES



**3**

**WRITE YOUR EMAILS.**

# EMAIL BEST PRACTICES

- Define a clear goal for your email
- Segment your recipient list
- Personalize where appropriate
- Focus on engagement
- Test and analyze

# SELECT APPROPRIATE NUMBER OF EMAILS TO SEND

To identify the appropriate number of emails you should send, breakdown the types of emails

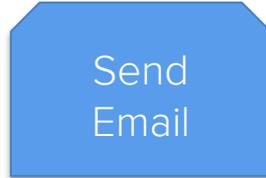
- Email Type 1: Goal = Build trust / conditioning
- Email Type 2: Goal = Additional downloads
- Email Type 3: Goal = Goal action
- Email Type 4: Goal = Breakup / goal action

# MAPPING OUT WORKFLOW LOGIC VISUALLY

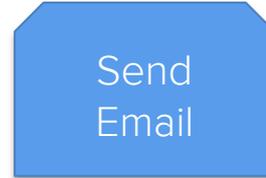
Enrollment Criteria



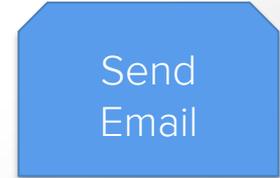
Build Trust



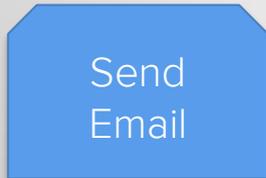
Build Trust



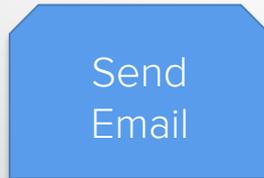
Additional Download



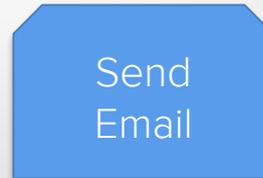
Soft Goal Action



Hard Goal Action



Breakup Goal Action



Goal





**ANALYZE YOUR WORKFLOW.**

ON



Workflow is active.

Goal: [CT | All MQLs & Opps](#) [ Edit ]

Total started

**30,307**

Joined goal list [?](#)

**5,540**

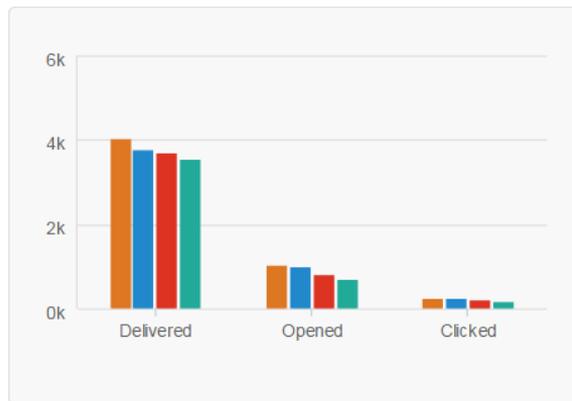
Goal list:

[CT | All MQLs & Opps](#)

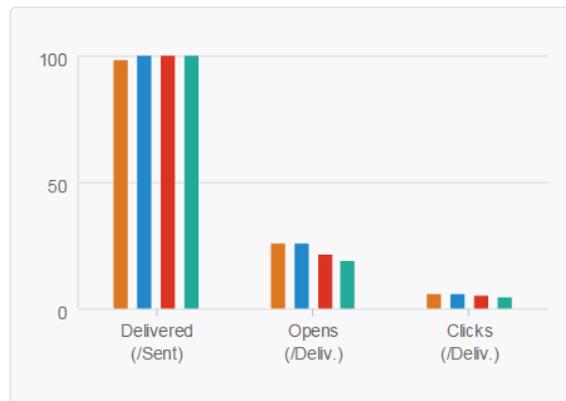
Conversion rate

**18.27%**

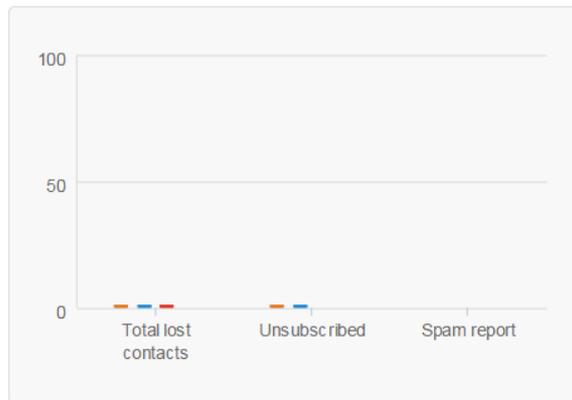
## Engagement



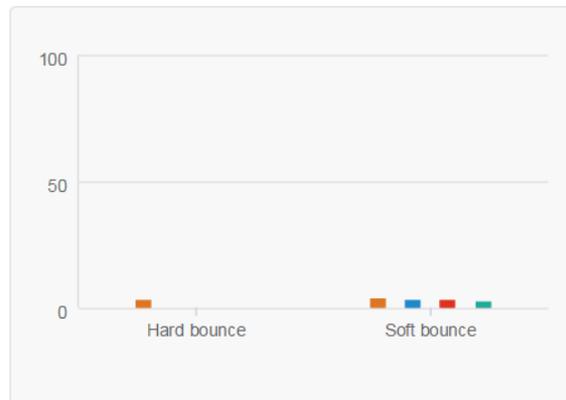
## Engagement Rate % delivered, opened, clicked



## Contact Churn Percent of total sent emails



## Delivery failure Percent of total sent emails



# PRO TIP #1

Almost every single lead nurturing workflow should have a goal list. Your goal list will determine whether your workflow was successful or not.

It should track a concrete action like a download or a form submission, not a click or an open of an email.

# PRO TIP #2

You don't build a house without a blueprint, so consider mapping your workflow out visually before you start building it in HubSpot.



# LIVE DEMO.

Let's take a look at a project page.

3

SURVEY PROJECT.

How do you collect statistics and  
gain **industry insights**?

Do you receive **feedback** on  
your products and services?



This project is for HubSpot Professional  
and Enterprise plans.



**70% of buying experiences are based on how  
the customer **feels they are being treated.****

Wouldn't it be nice to have a better understanding of how they feel?

# DEVELOPING A SURVEY STRATEGY

- 1 Plan and design a survey
- 2 Distribute a survey
- 3 Analyze survey results



**PLAN AND DESIGN A SURVEY.**

# PLAN AND DESIGN A SURVEY

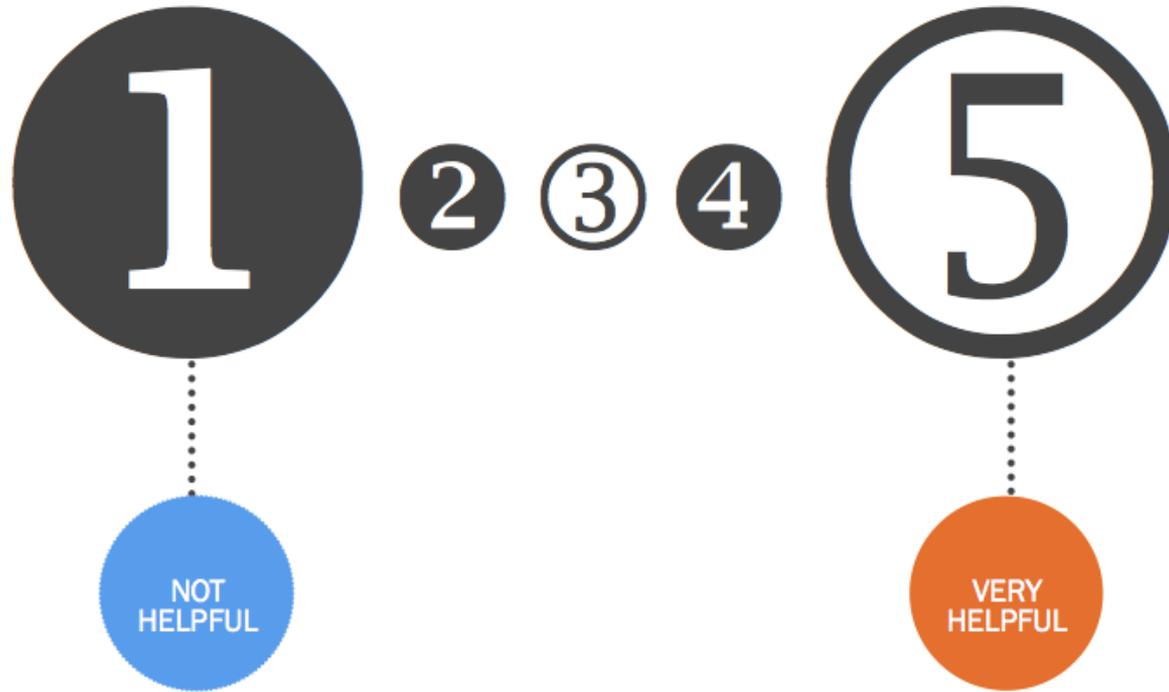
- 1 Define your survey goals

# SURVEY GOALS

- What do you hope to accomplish or learn with this survey?
- Is there a buyer persona that you'd like more information on?
- Are you aware of what your customers think about your company?
- What strategic decisions do you hope to impact with the results of this survey?

# PLAN AND DESIGN A SURVEY

- 1 Define your survey goals
- 2 Design the survey



When using scale points, **define the scale.**

Fully labeled scales are an added measure of stability that will help respondents focus and help you make better decisions based on the feedback.



**Did you enjoy your meal and  
your restaurant experience?**

Avoid double-barreled questions!

**2**

**DISTRIBUTE THE SURVEY.**

# DISTRIBUTE THE SURVEY



Determine who will receive the survey

# DISTRIBUTE THE SURVEY

- 1 Determine who will receive the survey
- 2 Promote the survey

# DISTRIBUTE THE SURVEY



Your Survey Goal will help you determine who receives the survey



Export your Contacts from HubSpot



Import Contacts into Survey Monkey



Promote and share the survey

**Export List** ✕



**Exported file is on the way!**  
In a few minutes you should have an email with a link to download your exported file.

**Check:** [\[redacted\]](#)  
Depending on the size of your list and the amount of properties you included, it could take a few minutes to build your file.

 [Manage your email settings](#)  
Not the right email? That's okay, you can change your primary email address at anytime.

**3**

**ANALYZE THE SURVEY RESULTS.**

# ANALYZE THE SURVEY RESULTS



Use the filter or compare analysis in SurveyMonkey

# ANALYZE THE SURVEY RESULTS

- 1 Use the filter or compare analysis in SurveyMonkey
- 2 Use HubSpot Lists to segment the data and contacts

# ANALYZE THE SURVEY RESULTS

The screenshot displays a HubSpot contact record with the following details:

- First Touch:** 3 Years Ago (Direct Traffic)
- Last Touch:** 10 Days Ago (Opened Email)
- Lifecycle Stage:** Customer (Since May 13, 2013)

The contact is marked as **Starred** and has a **HubSpot Score** of 75.

The interaction history for April is shown, with two items highlighted by orange arrows and numbered circles:

- Item 1:** Added to **Contacts with City** on Apr 10 2014 at 10:11 AM.
- Item 2:** Responded to NPS Survey on Apr 6 2014 at 3:06 PM. The survey results are as follows:
  - How likely is it that you would recommend this company to a friend or colleague?** 9
  - Why did you give us that score?** It would be a 10 but you only offer web ticket support, would love a dedicated number to call!
  - Email:** mschnitt@hubspot.com
  - What is the single biggest thing we could do to enhance your experience with the product?** Make everything realtime!

A link at the bottom of the interaction list reads: [Show all 9 interactions from April](#).

If you asked the question, you can see the data in HubSpot.

This will show on an individual contact record and you can build lists to segment contacts based on their responses.

# PRO TIP #1

SurveyMonkey recommends allowing your survey to run for at least five days in order to allow respondents with different habits the time they need to answer your questions.

# PRO TIP #2

Be specific. Ask about specific concepts or ideas.

Having a “good experience with customer support” is too general; receiving a “prompt response from customer support” is specific.



# LIVE DEMO.

Let's take a look at a project page.



**Don't forget:**

**Bookmark** these project pages, so you can access them at any time.



What HubSpot projects do you need help with?

What projects would you like us to build?

# NEW HUBSPOT PROJECTS

- Google AdWords PPC project
- Local Search Optimization project
- Blog Topic Ideas project

<http://academy.hubspot.com/customer-projects>

# NEXT STEPS

1. Pick one of the two projects that align with your 2015 goals.
2. Follow the steps and to-dos for the project.
3. Use the Calendar tool to build out your project timeline and work breakdown structure.
4. Provide us with your feedback and have fun!

# RESOURCES

1. Lead nurturing workflow project
2. Survey project

# QUESTIONS?



THANK YOU.