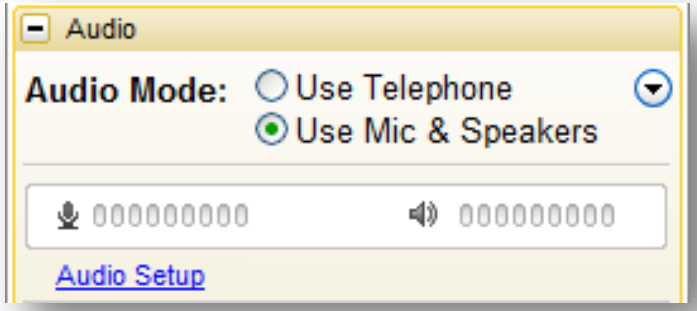
How to Create Qualified Leads with Lead Nurturing

INTERMEDIATE

#InboundLearning



We will be starting at 2:00pm EST.

Use the Question Pane in GoToWebinar to **Ask Questions**!

CHAT WITH US:

1. Using the question pane
2. Use the hashtag **#InboundLearning** on Twitter

How to Create Qualified Leads with Lead Nurturing

11/13 Understanding the Buying Process

11/20 Creating Lead Nurturing Campaigns

11/27 Executing & Analyzing Lead Nurturing Workflows

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AGENDA

1. Lead nurturing strategies
2. Prepping for campaign execution
3. Creating & launching a lead nurturing workflow
4. Email & lead nurturing campaign analytics
5. Webinar tasks

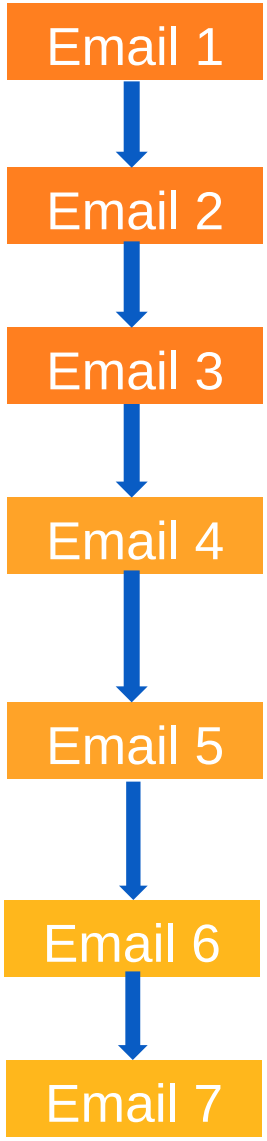
1 LEAD NURTURING STRATEGIES

Lead Nurturing Campaign Approaches

1. Persona-based lead nurturing approach
2. Lifecycle-based lead nurturing approach
3. Branching lead nurturing approach

PERSONA-BASED LEAD NURTURING APPROACH

Holistic Lead Nurturing Approach

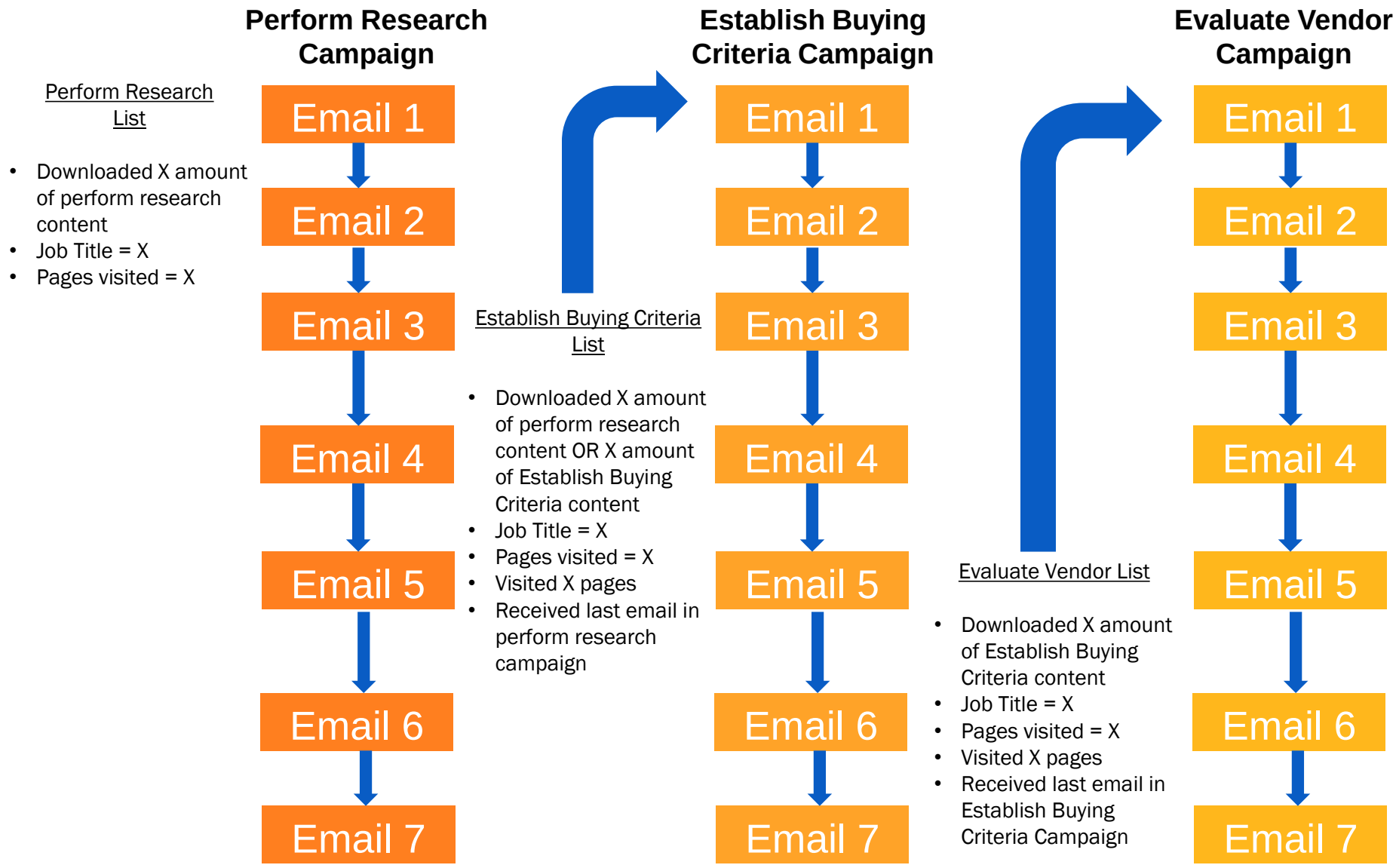


Holistic Lead Nurturing Approach

1. Basic understanding of the buying process
2. Starting condition will be something simple like submitted form & job title = X
3. The set of emails will be sent regardless of actions taken on each emails. The campaign will only stop early if someone completes an “evaluate vendor” offer (demo request, free trial)
4. The use of a suppression list will remove leads who have completed the goal of the campaign prior to the last email being sent
5. All leads passing through the campaign without completing the goal you set will be remarketed to and not left to “die”

LIFECYCLE-BASED LEAD NURTURING APPROACH

Lifecycle-based lead nurturing approach

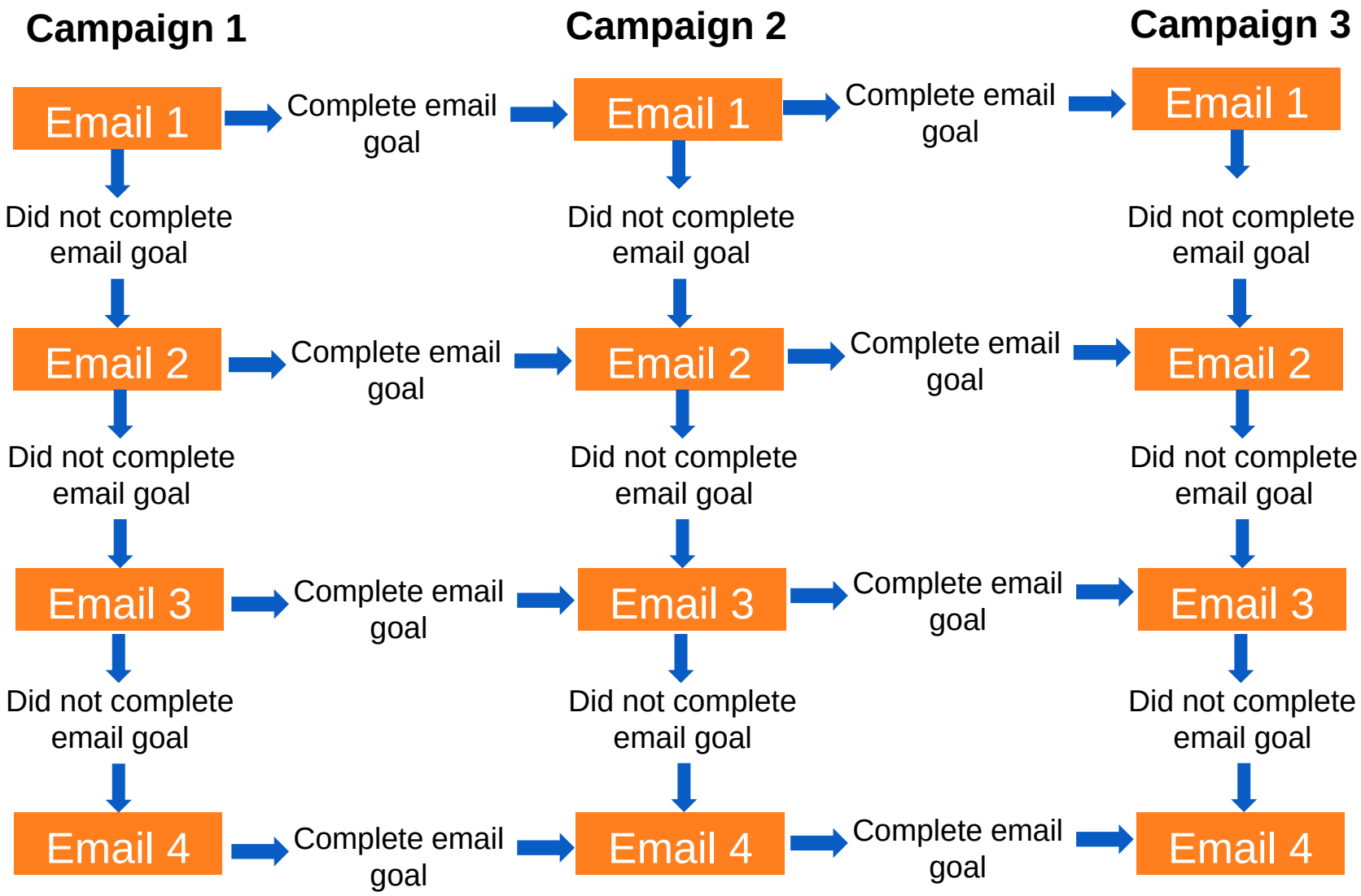


Lifecycle-based lead nurturing approach

1. Strong understanding of the buying process & personas
2. Starting criteria will most likely be a Smart List including forms submitted, basic properties & possibly custom property values
3. The set of emails will be sent until the criteria of the list for the next stage of the buying process is met. At this point the lead will be removed from the current campaign and entered into the next campaign
4. Suppression lists will be used to keep leads from moving backwards through the funnel
5. Leads who reach the last email will be automatically be moved to the next campaign

BRANCHING LEAD NURTURING APPROACH (NOT RECOMMENDED)

Branching lead nurturing approach



2 PREPPING FOR CAMPAIGN EXECUTION

Buying Process Worksheet

The Buying Process	Realize Problem or Need		Perform Research		Establish Buying Criteria		Evaluate Vendors	
Buyer Persona 1	Buyer Persona 1	Weeks in Stage	Buyer Persona 1	Weeks in Stage	Buyer Persona 1	Weeks in Stage	Buyer Persona 1	Weeks in Stage
Existing Content or Offers								
Existing Content or Offers								
Existing Content or Offers								
New Content or Offers								
New Content or Offers								
New Content or Offers								
Buyer Persona 2	Buyer Persona 2	Weeks in Stage	Buyer Persona 2	Weeks in Stage	Buyer Persona 2	Weeks in Stage	Buyer Persona 2	Weeks in Stage
Existing Content or Offers								
Existing Content or Offers								
Existing Content or Offers								
New Content or Offers								
New Content or Offers								
New Content or Offers								
Buyer Persona 3	Buyer Persona 3	Weeks in Stage	Buyer Persona 3	Weeks in Stage	Buyer Persona 3	Weeks in Stage	Buyer Persona 3	Weeks in Stage
Existing Content or Offers								
Existing Content or Offers								
Existing Content or Offers								
New Content or Offers								
New Content or Offers								
New Content or Offers								
Buyer Persona 4	Buyer Persona 4	Weeks in Stage	Buyer Persona 4	Weeks in Stage	Buyer Persona 4	Weeks in Stage	Buyer Persona 4	Weeks in Stage
Existing Content or Offers								
Existing Content or Offers								
Existing Content or Offers								
New Content or Offers								
New Content or Offers								
New Content or Offers								

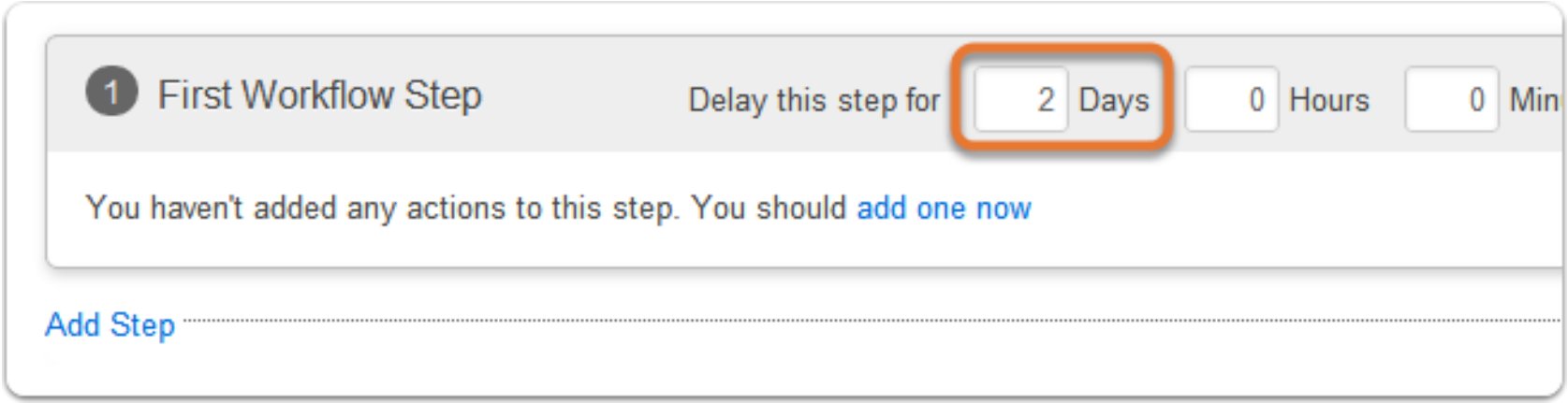
LEAD NURTUING WORKSHEET

Concerned Connie						
Email	Buying Process Stage	Content offer	Call to Action	Landing Page URL	Timing (delay)	Goal of Email
Email 1	Perform Research (PR)	Blog 5 things: Healthcare Emergency	Read Blog Article	blog.patientadvoc	1 day Delay	Build Trust
Email 2	Perform Research (PR)	Healthcare Emergency Guide	Download Guide	info.patientadvoca	2 day Delay	Provide Value
Email 3	Establish Buying Criteria (EBC)	6 signs you need a patient advocate	Download whitepaper	info.patientadvoca	2 day Delay	Move to EBC
Email 4	Establish Buying Criteria (EBC)	Interviewing Guide - patient advoate	Download guide	info.patientadvoca	2 day Delay	Move to EBC
Email 5	Evaluate Vendor (EV)	Free Consultation	Request consultation	info.patientadvoca	2 day Delay	Move to EV
Email 6	Evaluate Vendor (EV)	Free Consultation	Request consultation	info.patientadvoca	2 day Delay	Move to EV
Email 7	Evaluate Vendor (EV)	Blog articles	Subscribe to blog	info.patientadvoca	2 day Delay	Breakup email
Email 8						

Campaign timing & email timing

Email timing/delay between emails

Timing (delay)
1 day Delay
2 day Delay
2 day Delay
2 day Delay
2 day Delay
2 day Delay
2 day Delay



Select target persona for campaign

Smart goal of the campaign

Move 5% of new Director Darren “perform research” stage leads through to the “evaluating vendor” stage within 30 days of becoming a new lead.

The Buying Process

Perform Research

Prospect knows there is a problem that needs to be solved

Free whitepaper
Free guides & tip-sheets
Free eBooks
Free checklists
Free videos
Free kits (combo of above)

LEAD NURTURING

Establish Buying Criteria

Prospect recognizes a need for a solution like yours.

Free webinars
Case Studies
Free Samples
Product spec sheets
Catalogs

LEAD NURTURING

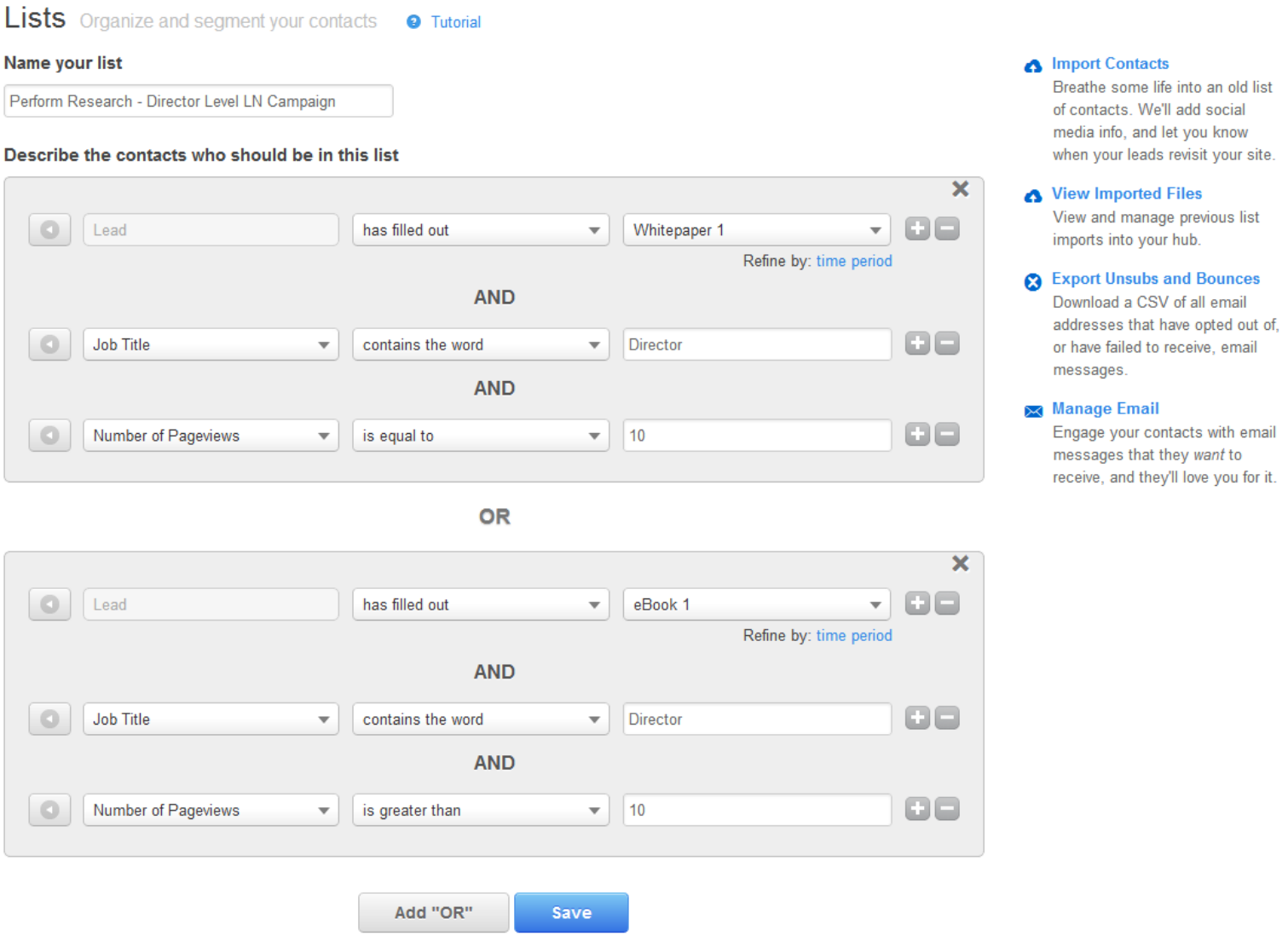
Evaluate Vendors

Prospect seeks solutions to their need; ready to buy.

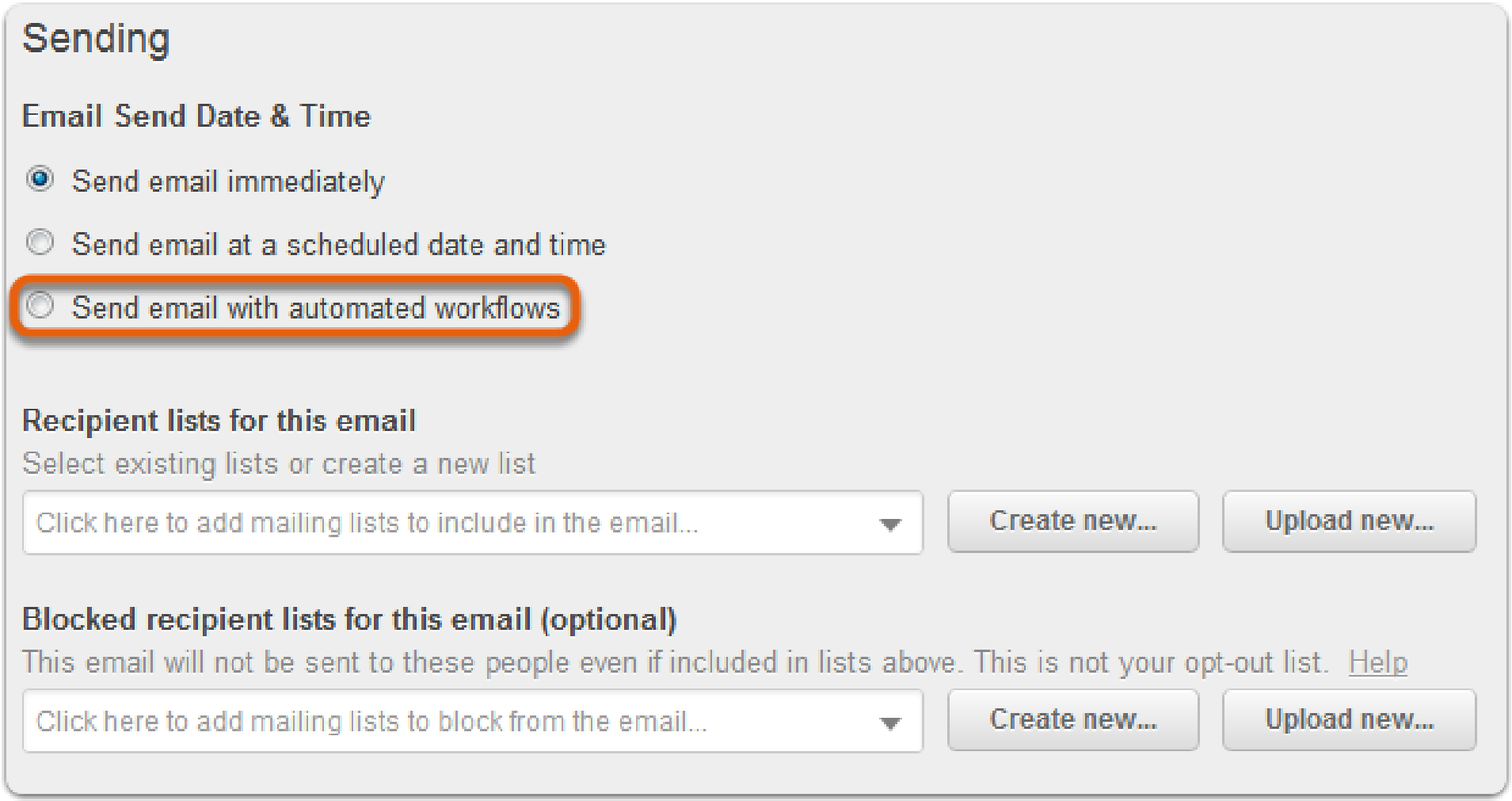
Free trials
Demos
Free Consultations
Estimates or quotes
Coupons

LEAD NURTURING

Smart List to start campaign



Emails created for campaign



6 Steps to Designing the Perfect Lead Nurturing Workflow

- ☑ **Identify who you will be targeting:**
  - It is important for goal setting to identify which part of your target marketing you will be focusing on.
- ☑ **Create a goal for the campaign:**
  - The goal of your campaign should be to move your leads through the buying process. Make the goal something quantifiable like “get lead to request demo/free trail”
- ☑ **Create list/identify form that will trigger the Lead Nurturing Workflow:**
  - The options available to trigger a lead nurturing Workflow are almost limitless. Start with a simple list or form and begin experimenting from there
- ☑ **Write emails and save for automation**
  - Make sure you are clear on email best practices to maximize your chances of completing your goal
- ☐ **Create Workflow:**
  - Don’t forget to turn on the workflow!
- ☐ **Analyze/Edit:**
  - Make sure you take the time to analyze your Workflow emails (click rate above 10% is good)

3

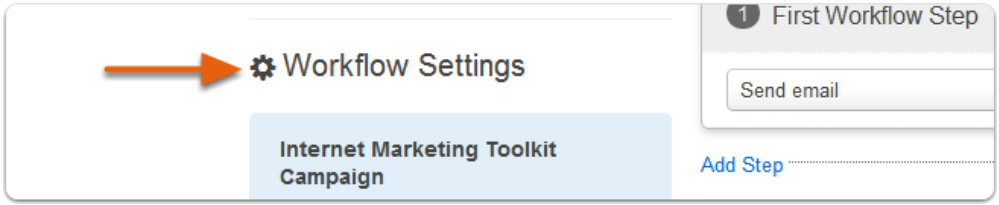
CREATING & LAUNCHING A LEAD NURTURING WORKFLOW

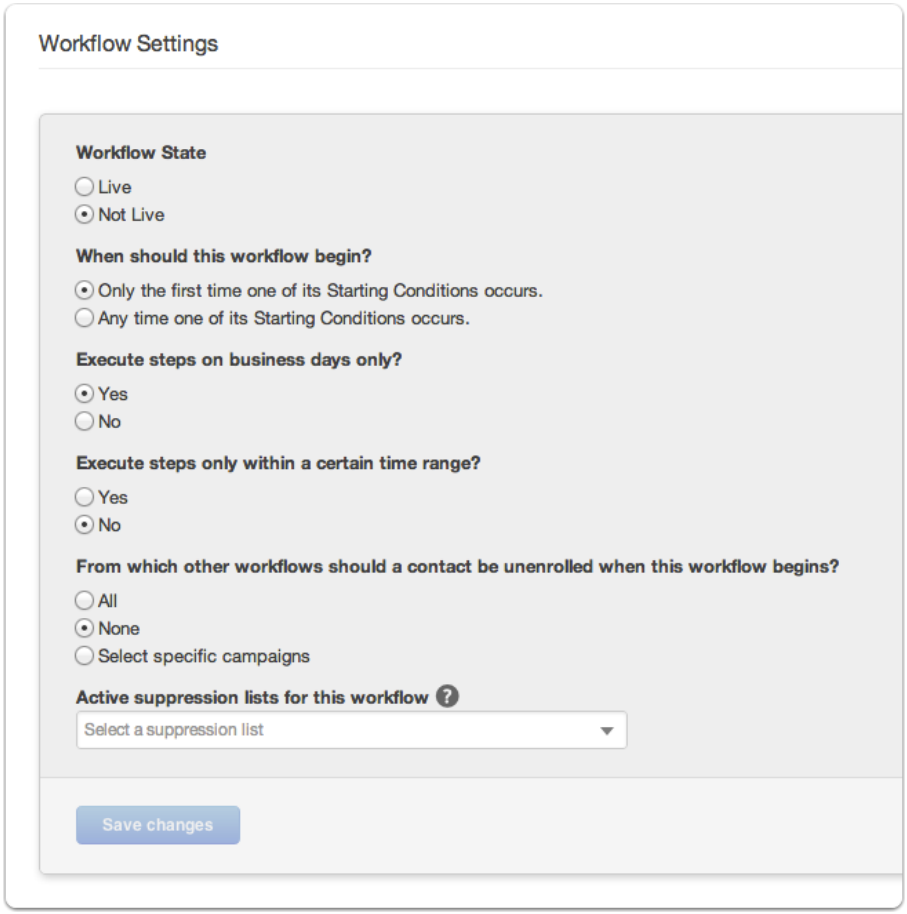
Creating & launching a lead nurturing workflow

1. Workflow Settings
2. Workflow FAQ’s
3. Creating the Campaign

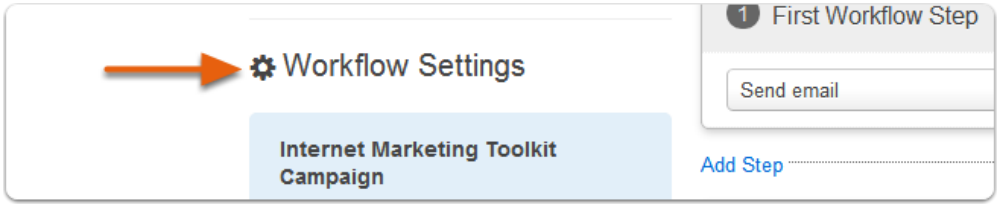
WORKFLOW SETTINGS

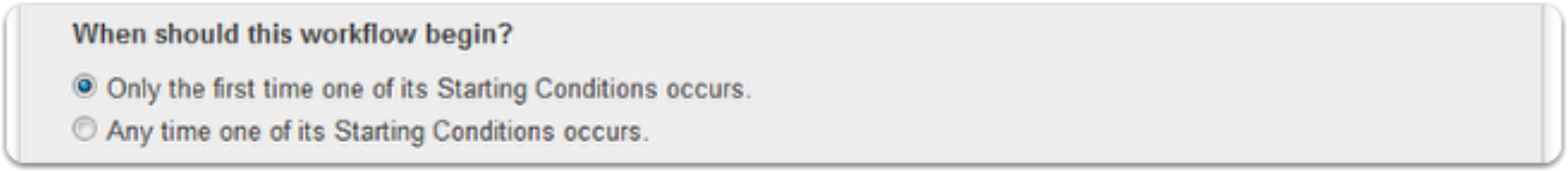
Workflow Settings





Settings: When should this Workflow begin

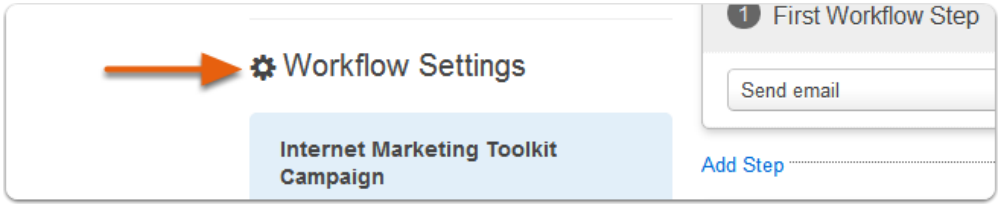




The majority of the time for lead nurturing, you will only want a lead to receive the campaign once.

This setting is more applicable for non-email workflow steps

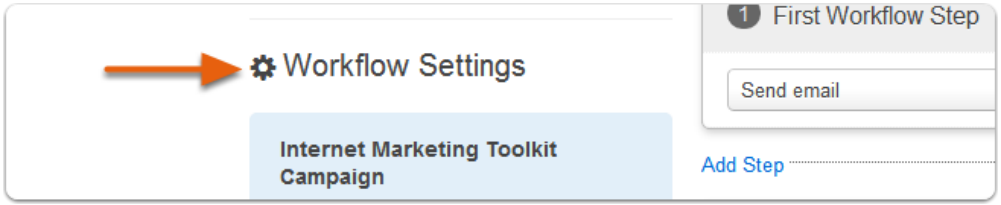
Settings: Execute steps on business days only?



Workflows will not execute on weekends; however, weekends will count towards the timing of the workflow.

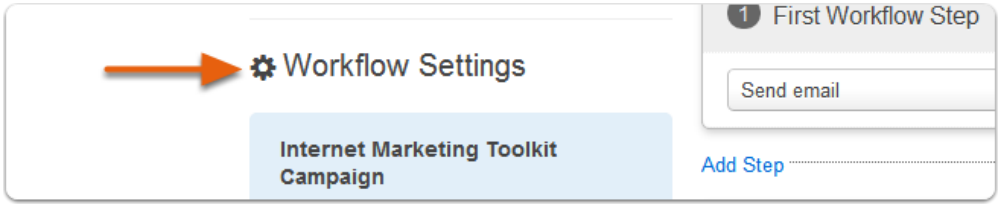
e.g. If the starting condition is executed on a Friday and the action has a timing of 3 days, the actions will trigger on Monday (HubSpot counts Saturday and Sunday as day 1 and day 2)

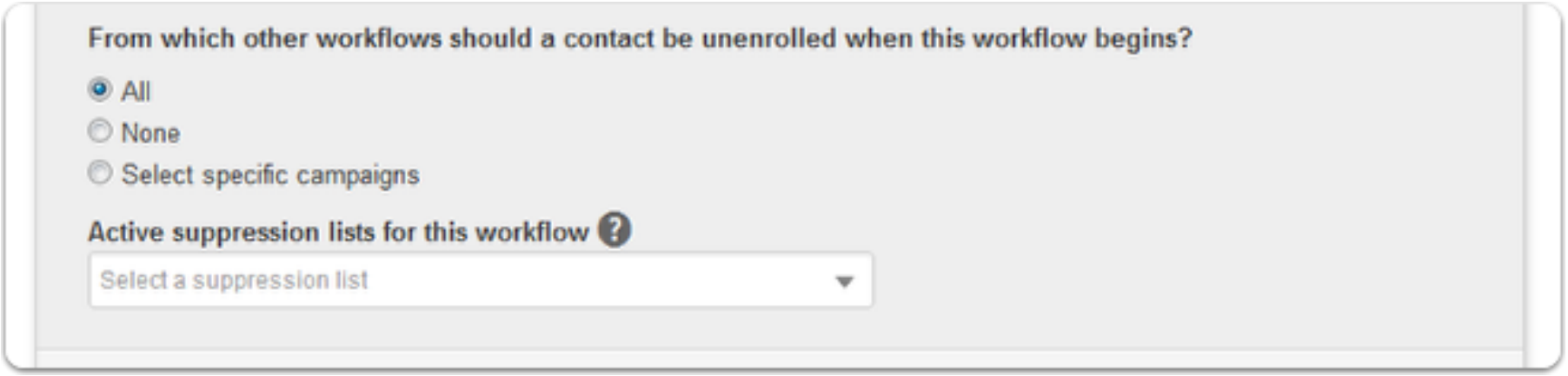
Settings: Execute steps only within a certain time range?



Email timing is based on the portal time zone

From which other workflows should a contact be **not enrolled** when this workflow begins?





Suppression lists stop leads from receiving emails based on the inclusion of another smart list.

e.g. Request a Demo Smart List: Any lead that requested a demo in the past or does at any point during the campaign will not receive future emails from the campaign

WORKFLOW FAQ'S

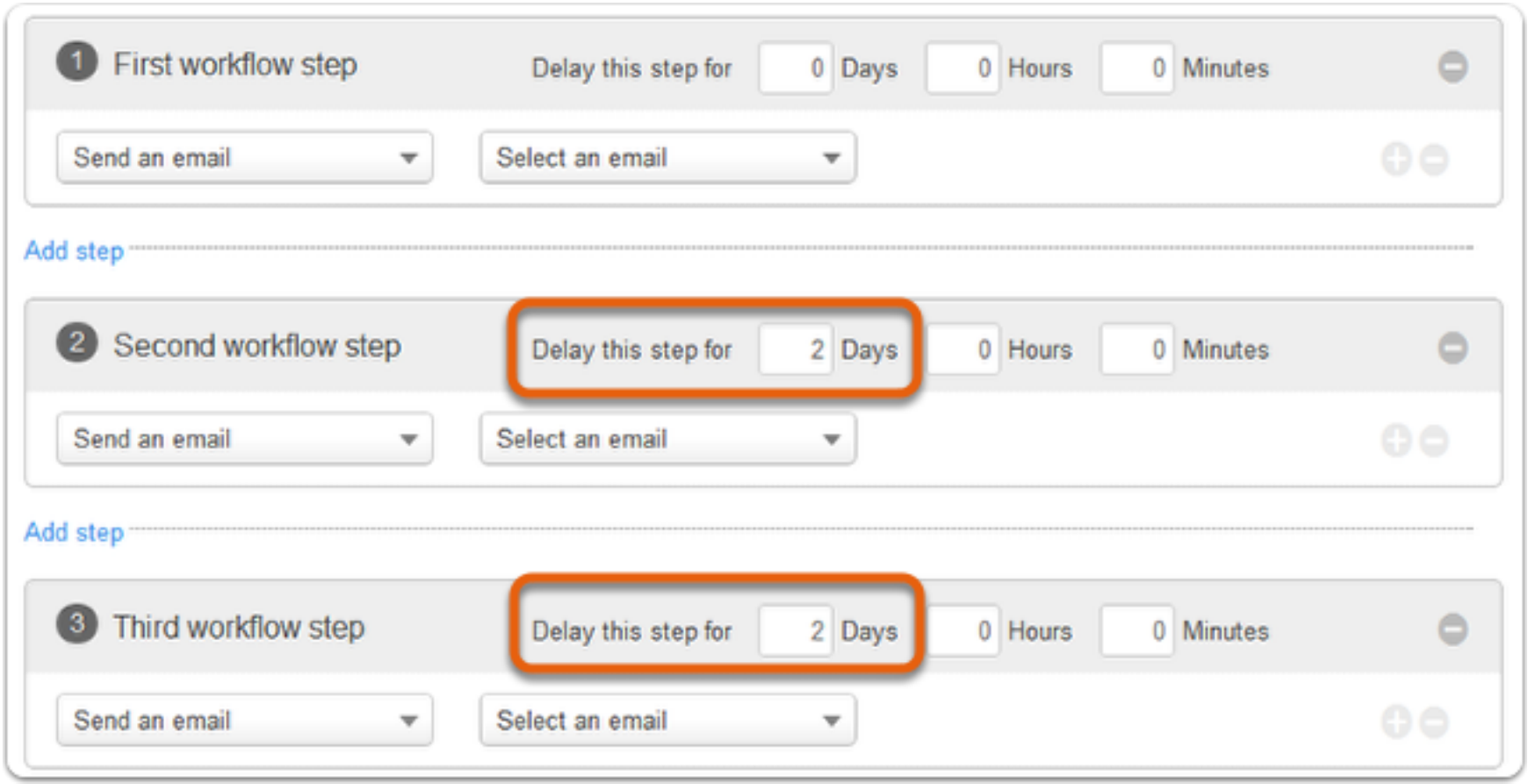
Additional Workflows FAQ's

1. Understanding Time Delays
2. What happens if I change an email or time delay of a live campaign?
3. Who is enrolled into the campaign when I activate it?

FAQ 1

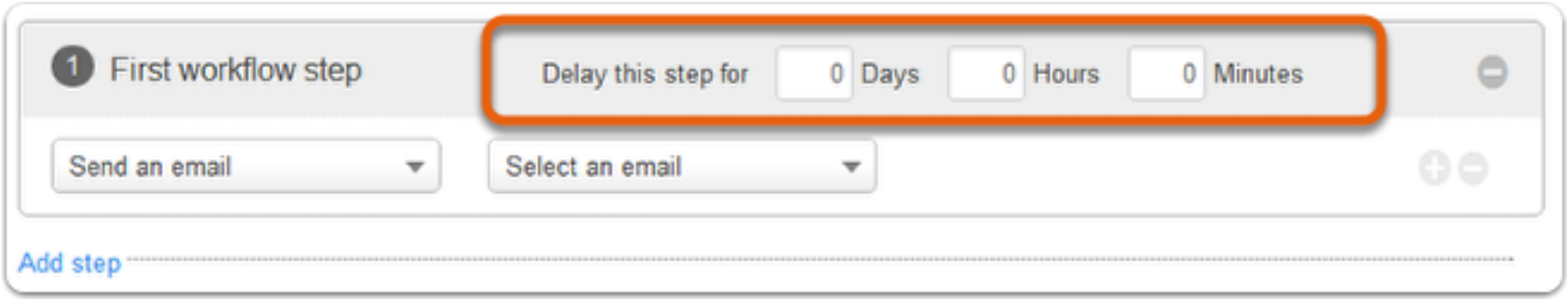
UNDERSTANDING TIME DELAYS

How time delays work



Time delays are always calculated from the time the previous step in the campaign was executed or from when the starting condition was triggered

What happens if delay is set to zero?

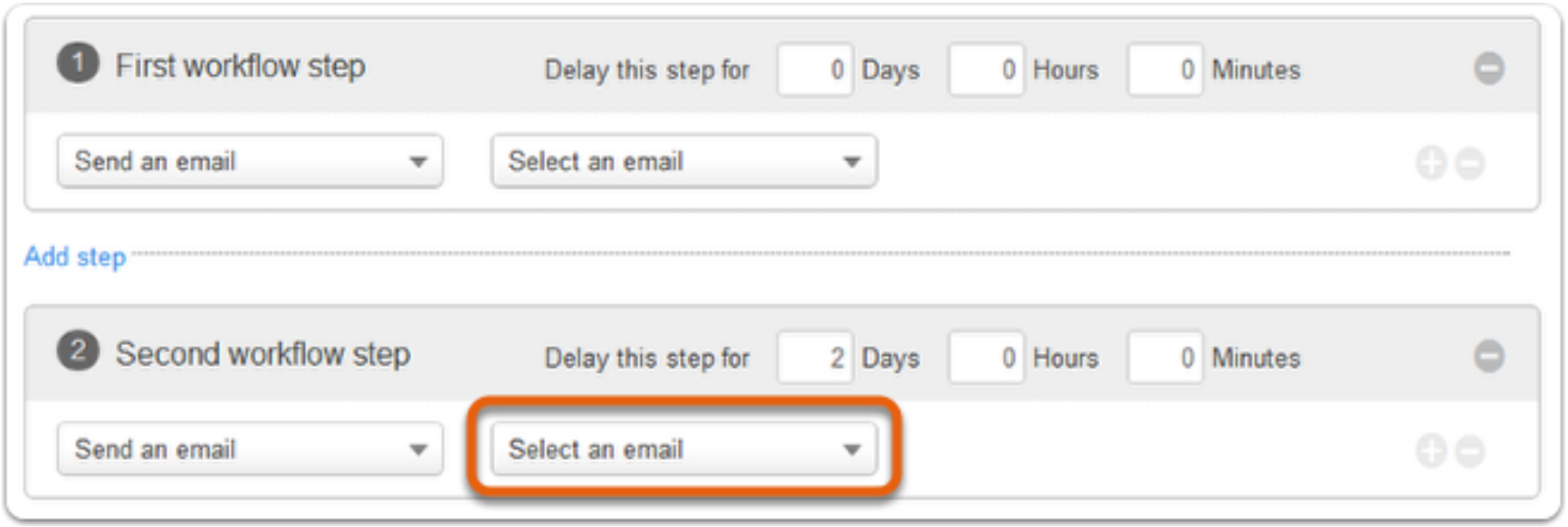


- Form submissions or static list will execute immediately
- Smart Lists take up to 15 minutes to execute

FAQ 2

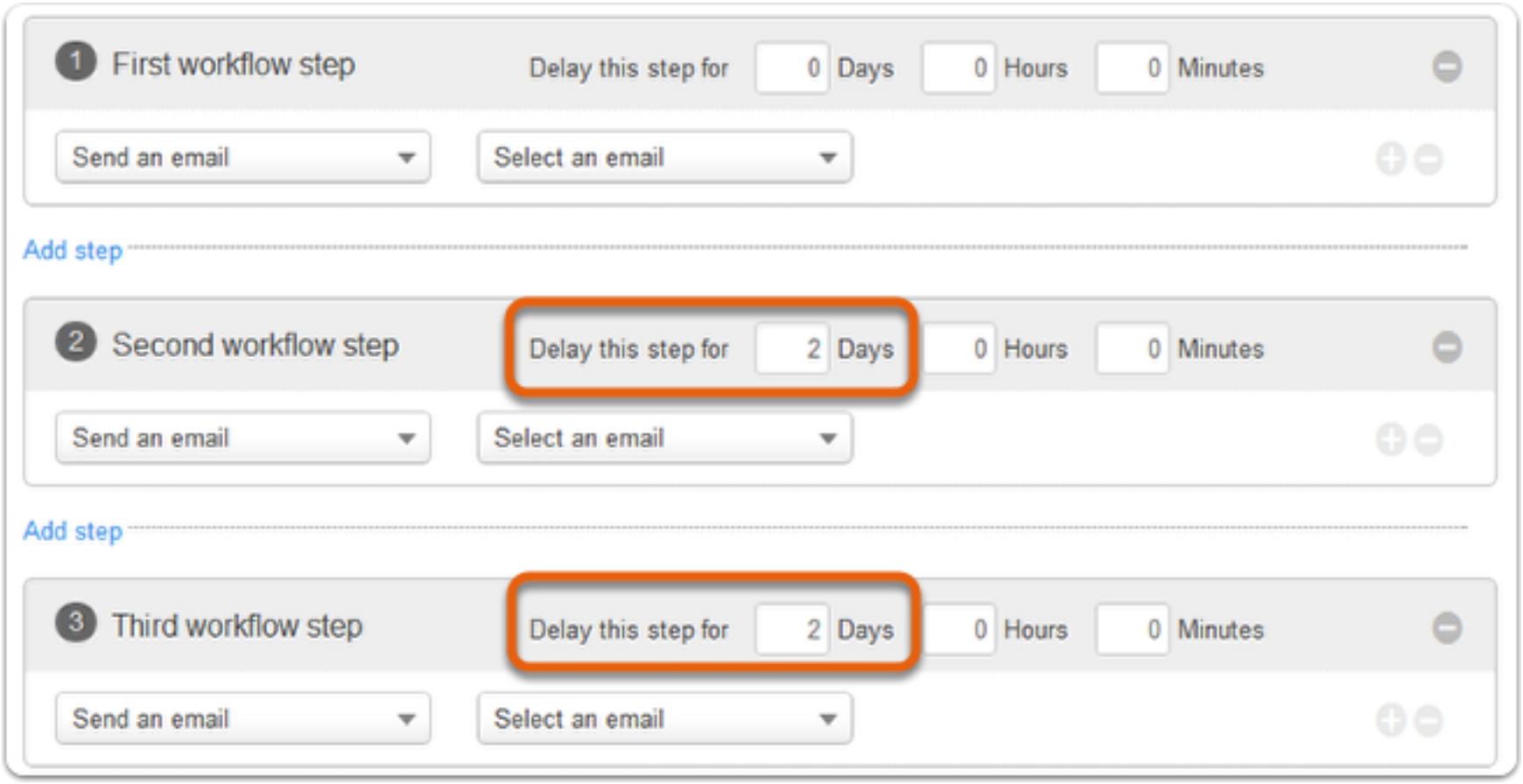
WHAT HAPPENS IF I CHANGE AN EMAIL OR TIME DELAY OF A LIVE CAMPAIGN?

Updated email after Workflow was activated



Emails sent as the result of a Workflow step can be edited/changed at any point before that step is executed for any contact

Updates to Workflow step timing

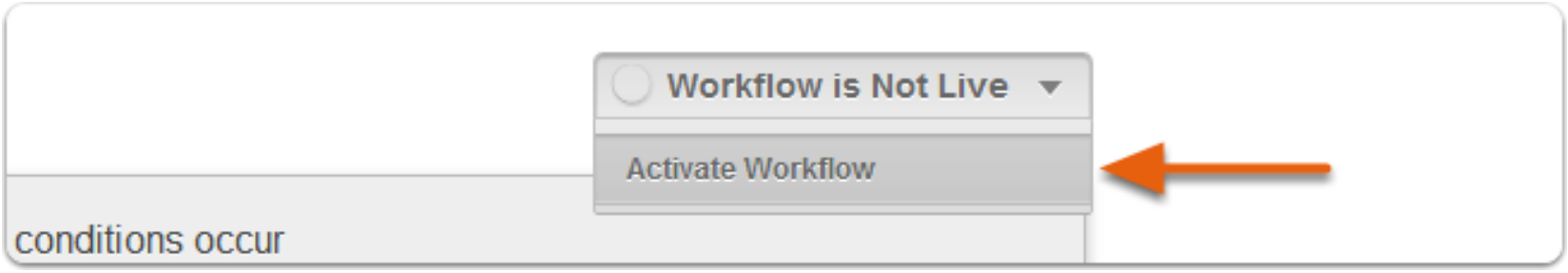


The next step of any workflow gets scheduled when the step before it executes.

FAQ 3

WHO IS ENROLLED INTO THE CAMPAIGN WHEN I ACTIVATE IT?

Workflows triggered by Forms &/or Smart Lists

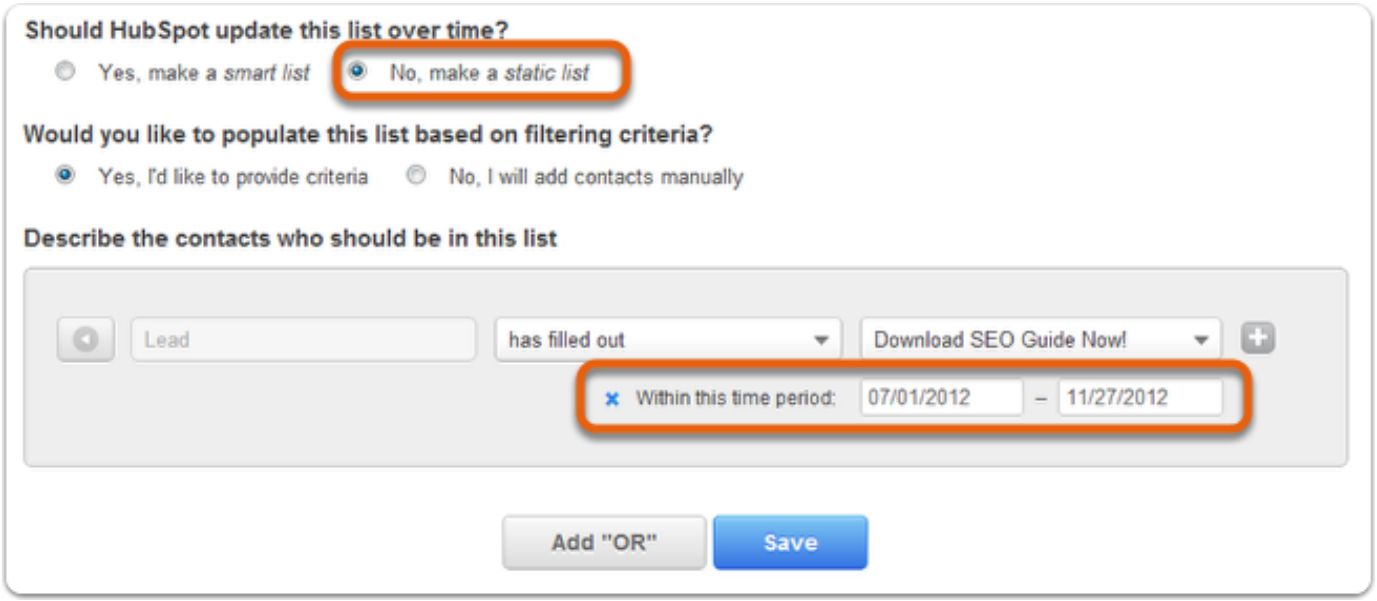


Only leads captured after the Workflow has been activated will be added to the Workflow

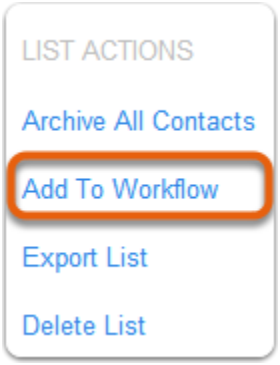
All leads captured previous to a Workflow going live will not be entered into the campaign. This is true for leads that have filled out forms or meet the criteria of your smart list

How to enroll leads captured prior to the Workflow being Activated

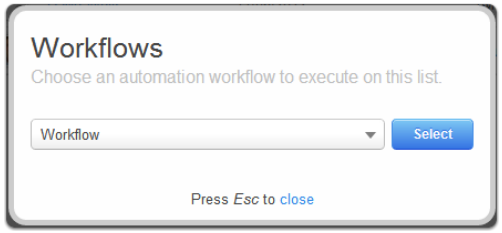
Step 1



Step 2

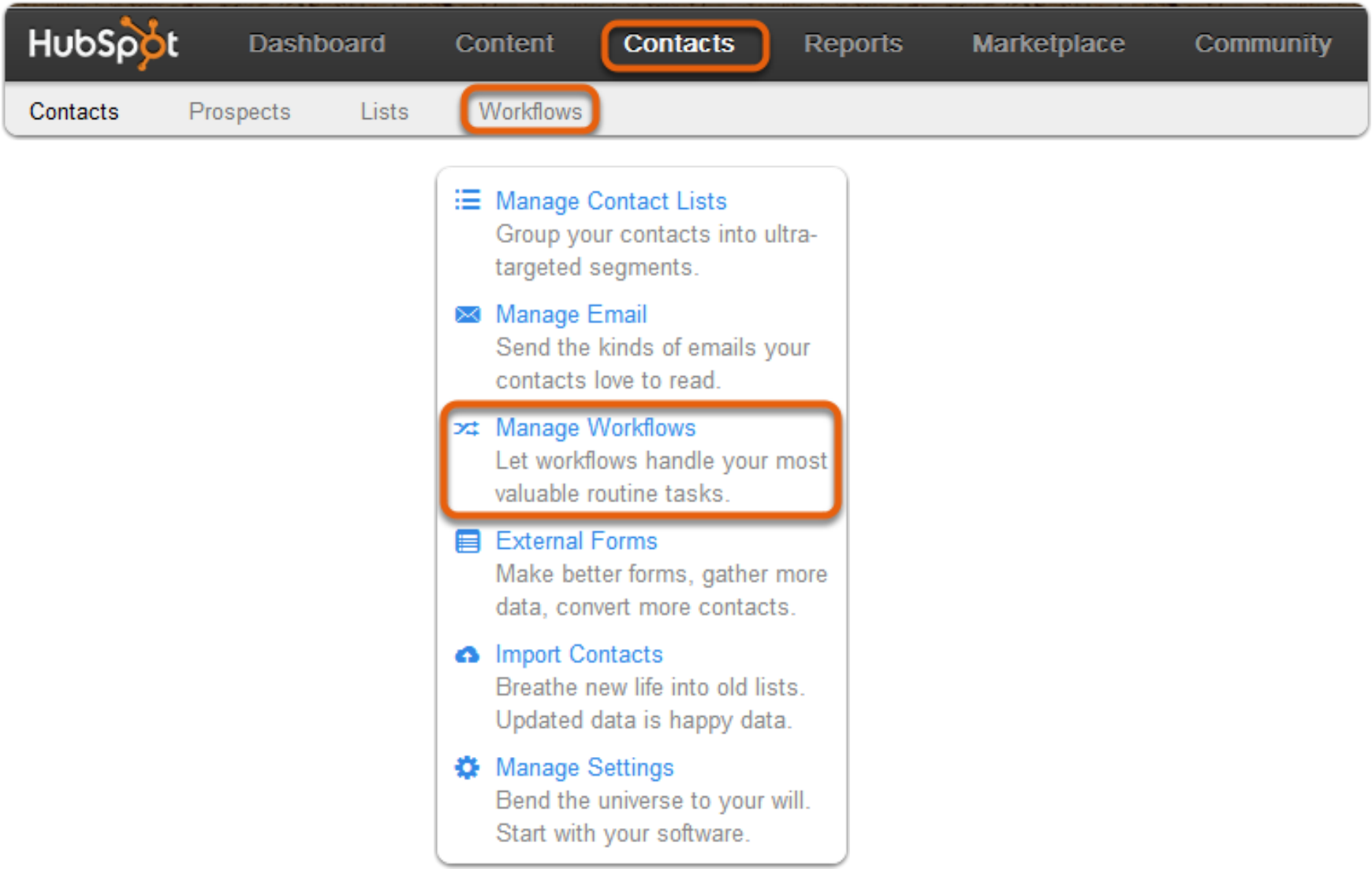


Step 3

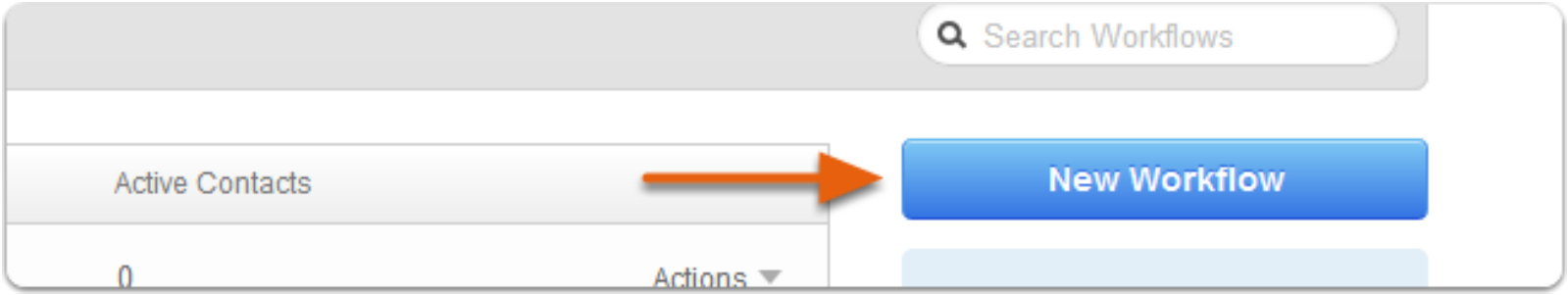


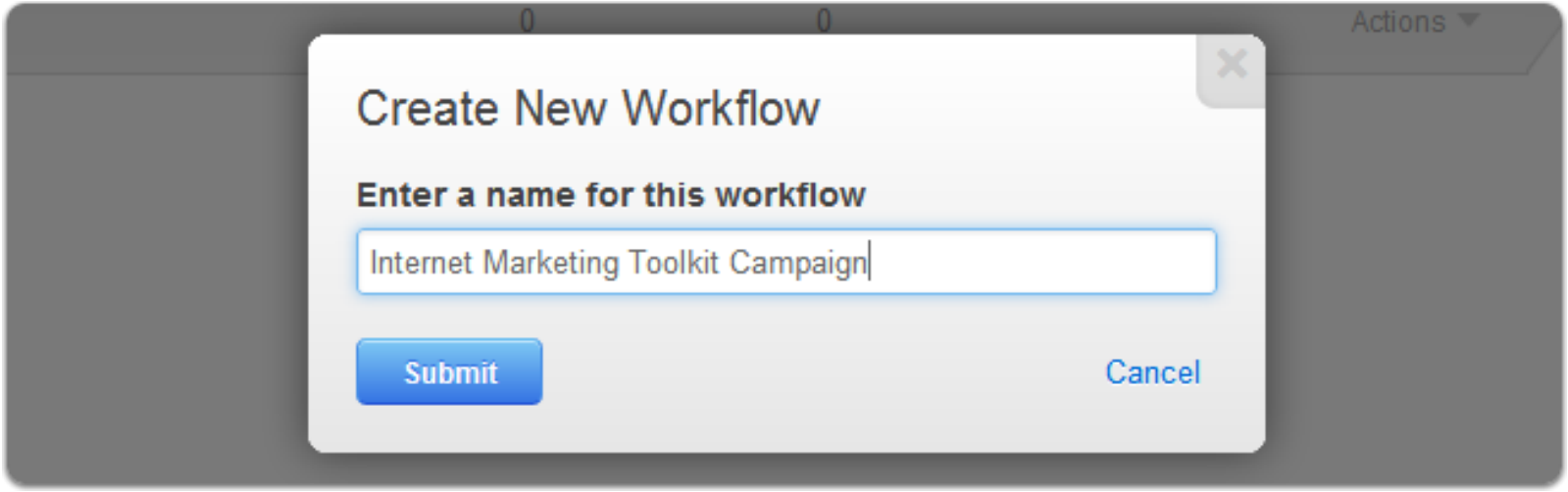
CREATING A WORKFLOW

Go to the Workflows tool

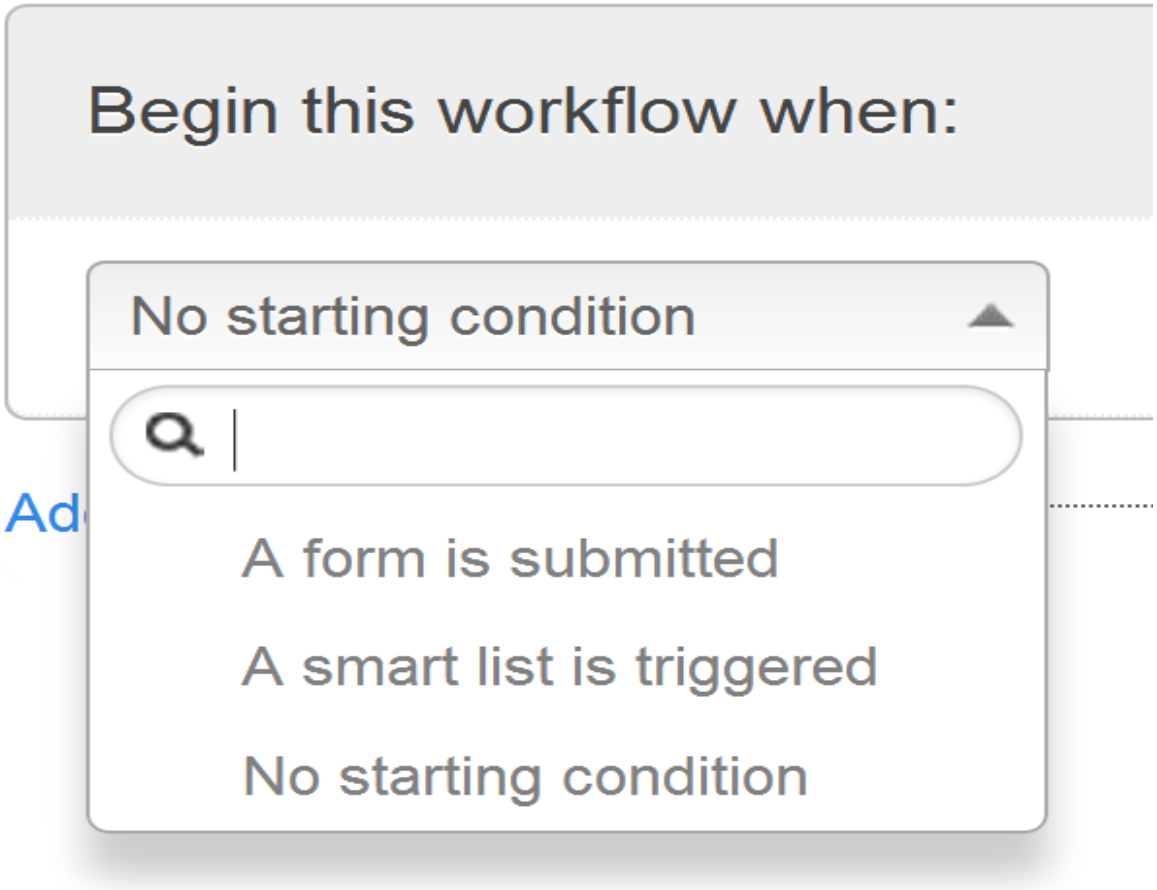


Create a new Workflow



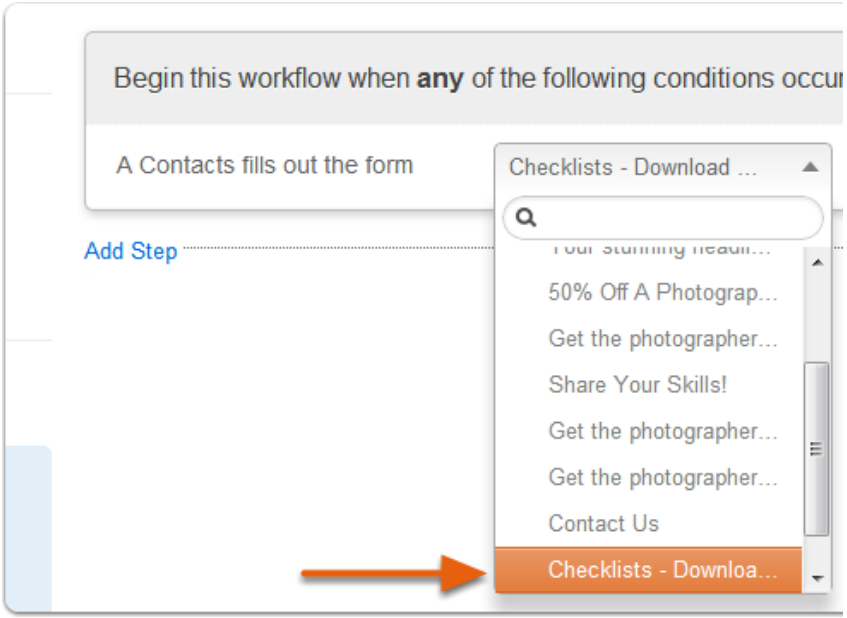


3 types of starting conditions

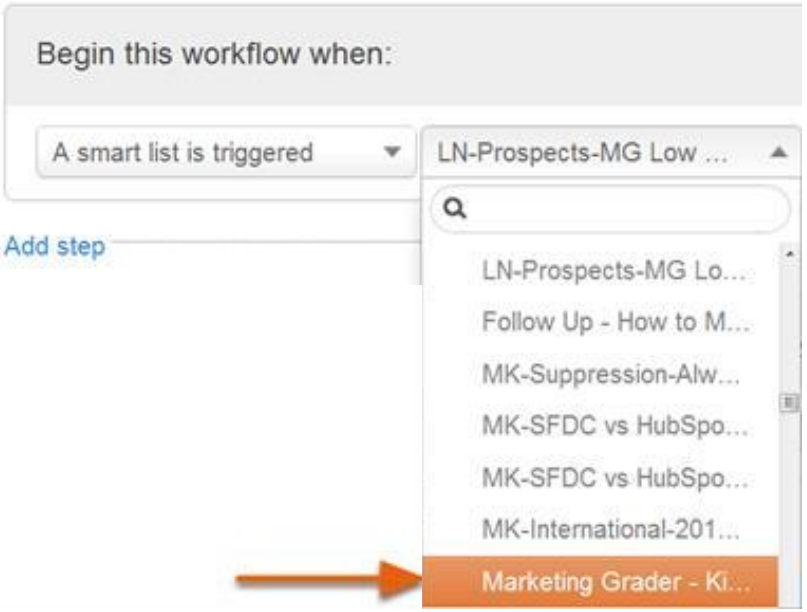


Select starting condition(s)

Option 1: Form is Submitted

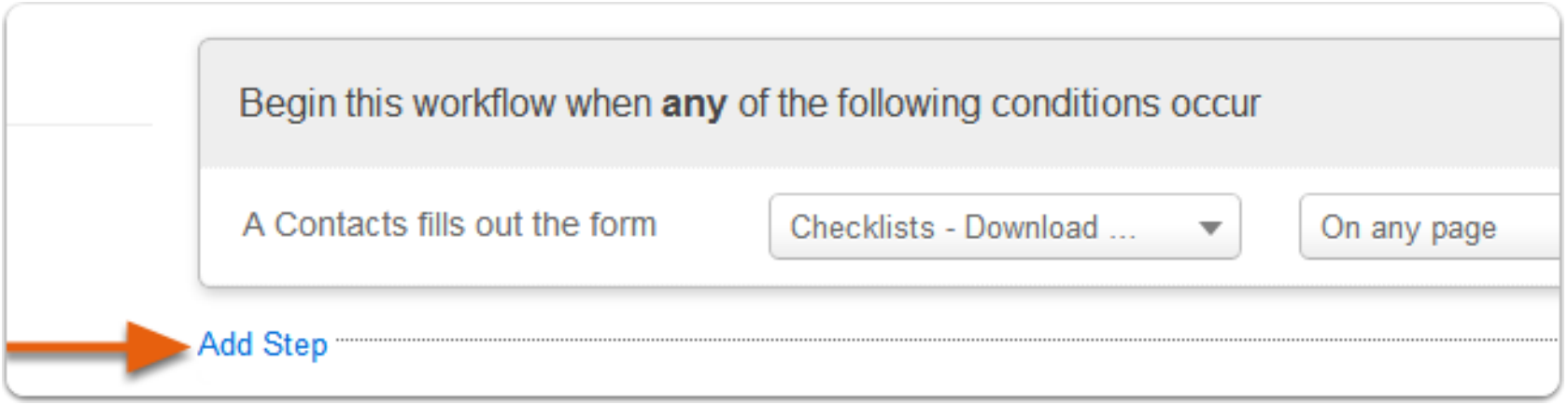


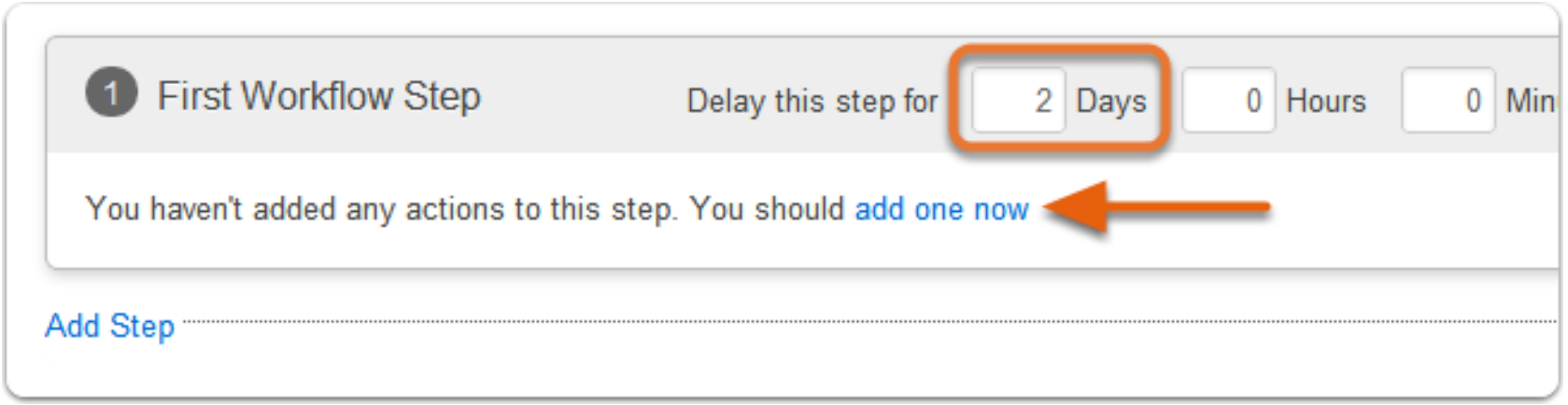
Option 2: Smart List is Triggered



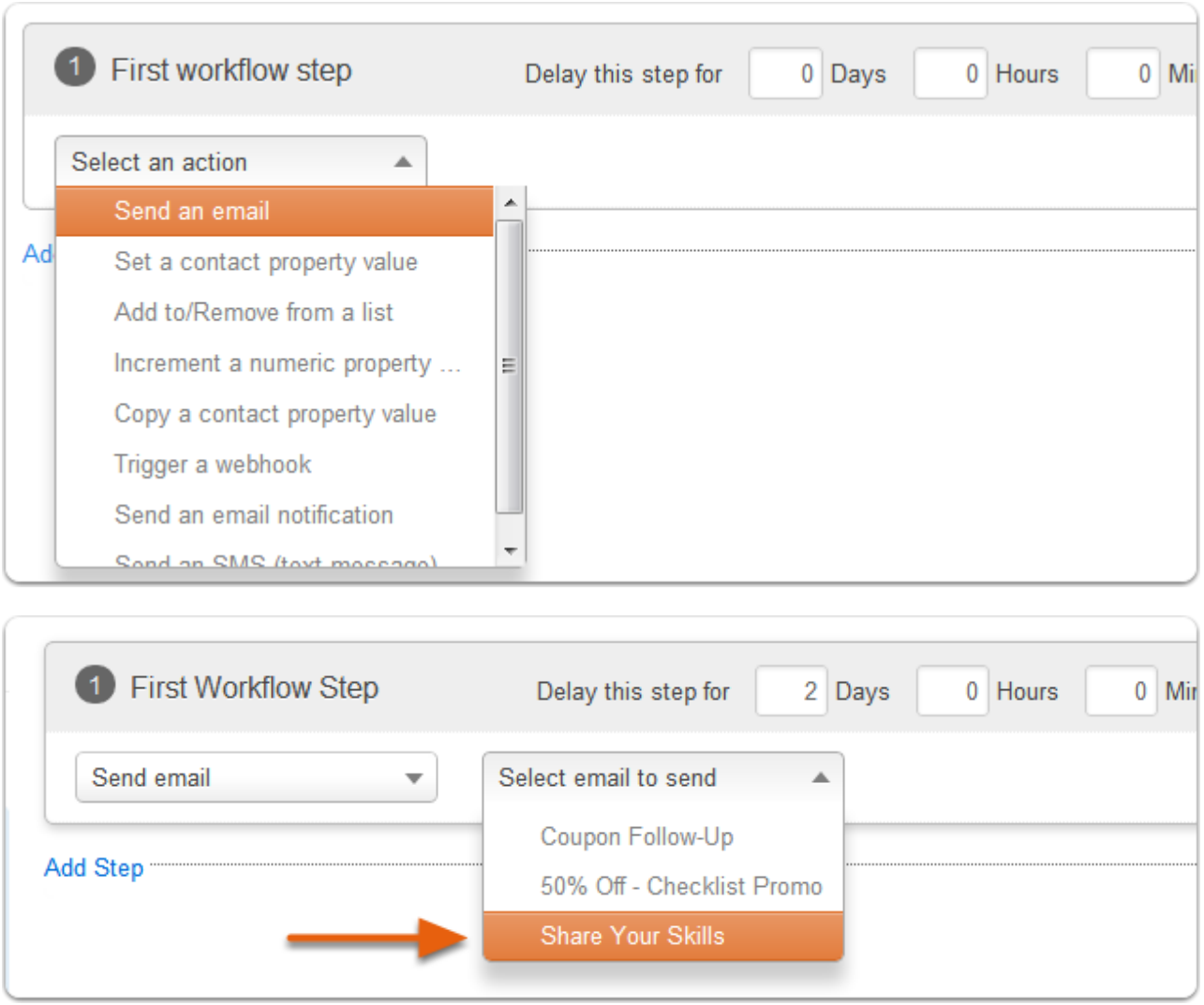
Select + for multiple starting conditions

Add a step & set delay for the step

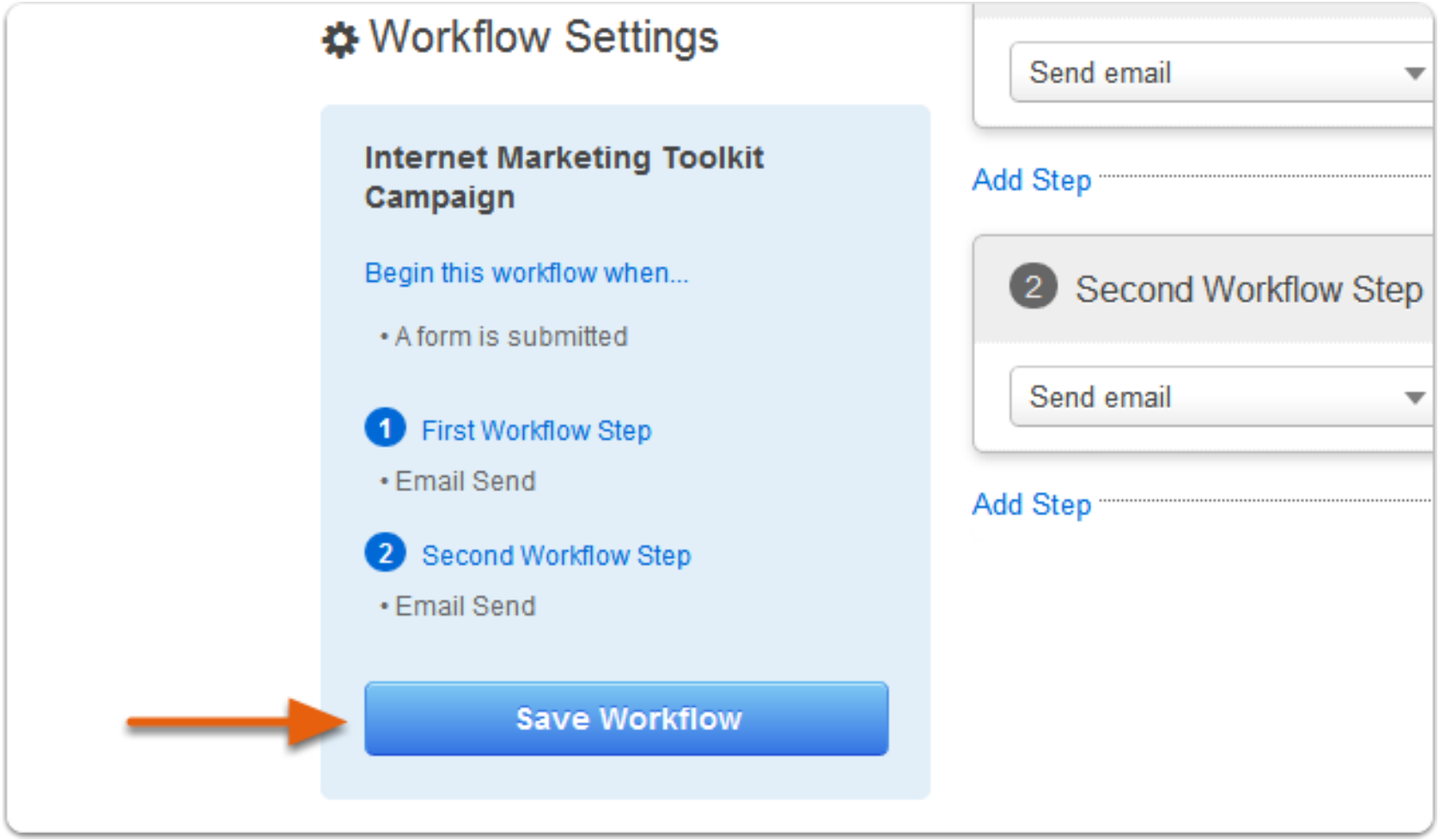




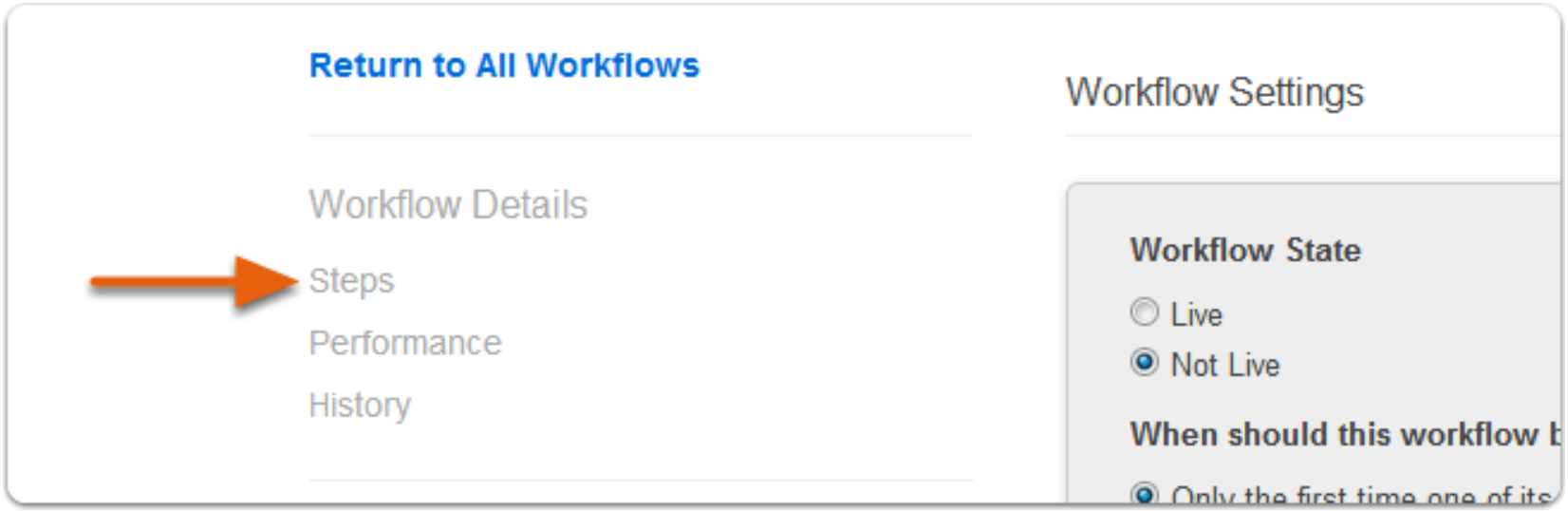
Select action & email to send

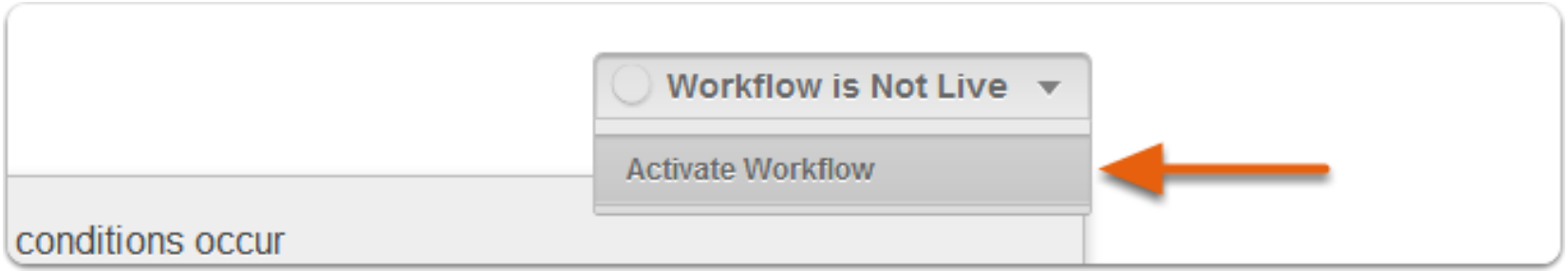


Save your Workflow



2 ways to launch your Workflow

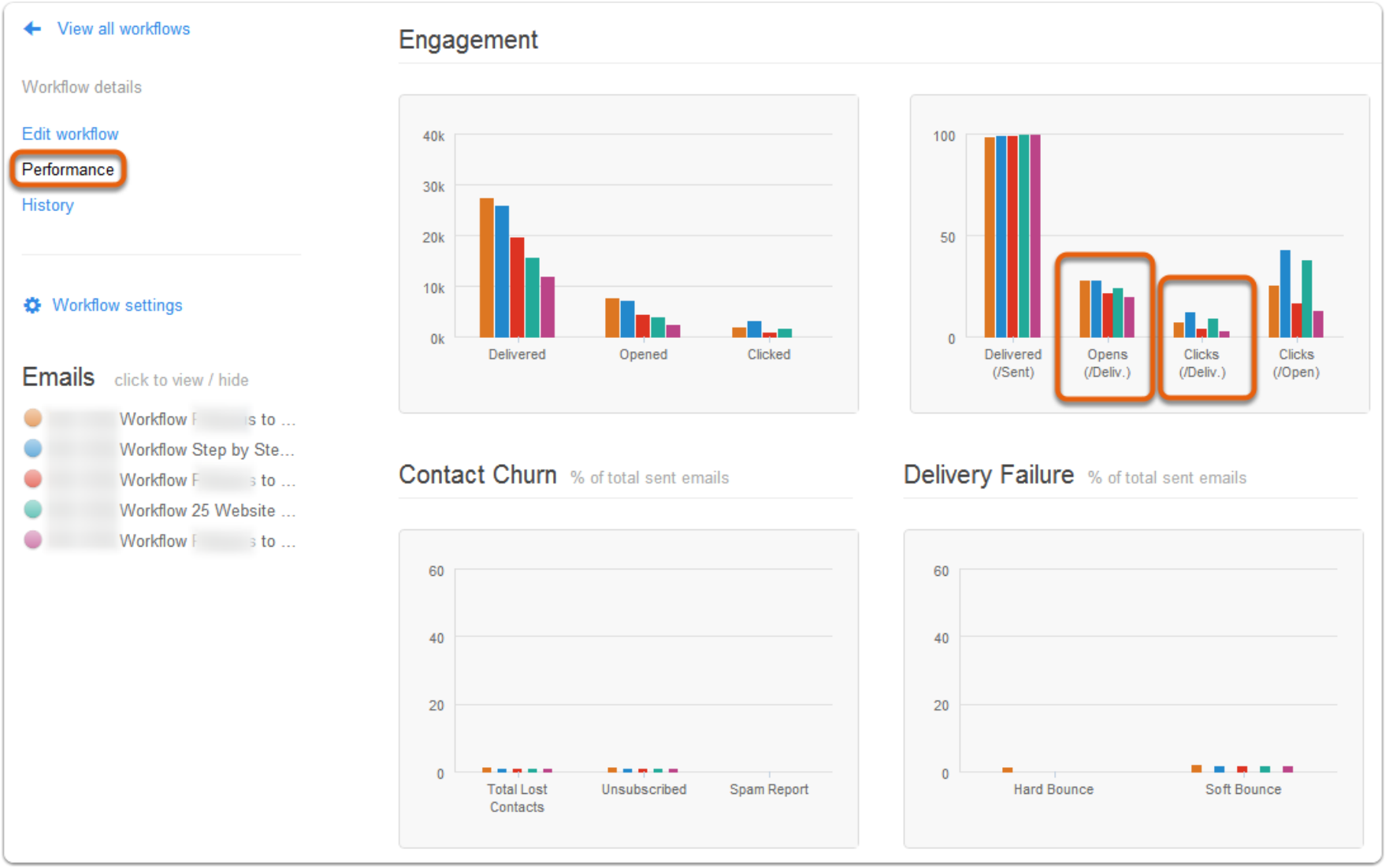




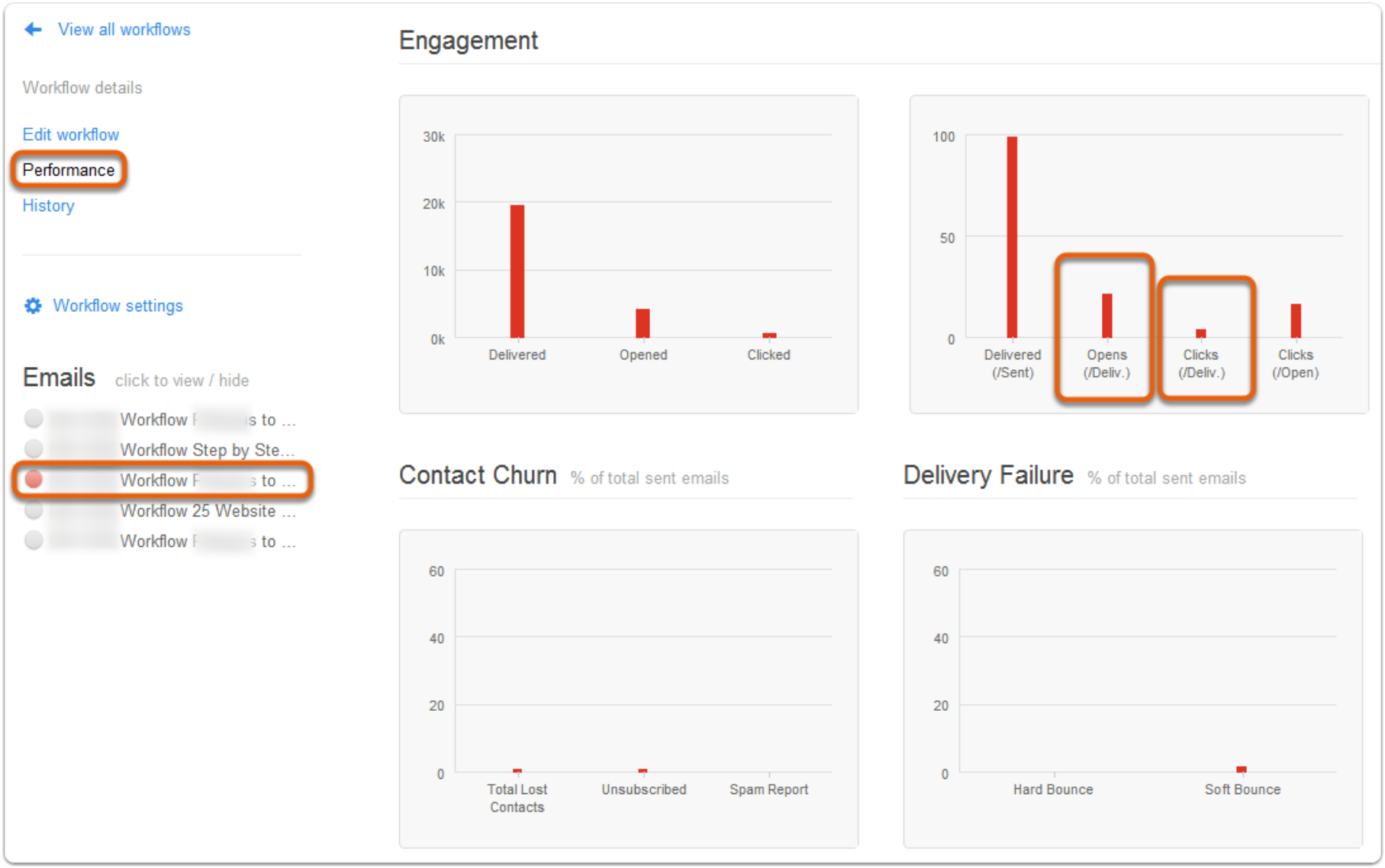
4

EMAIL & LEAD NURTURING CAMPAIGN ANALYTICS

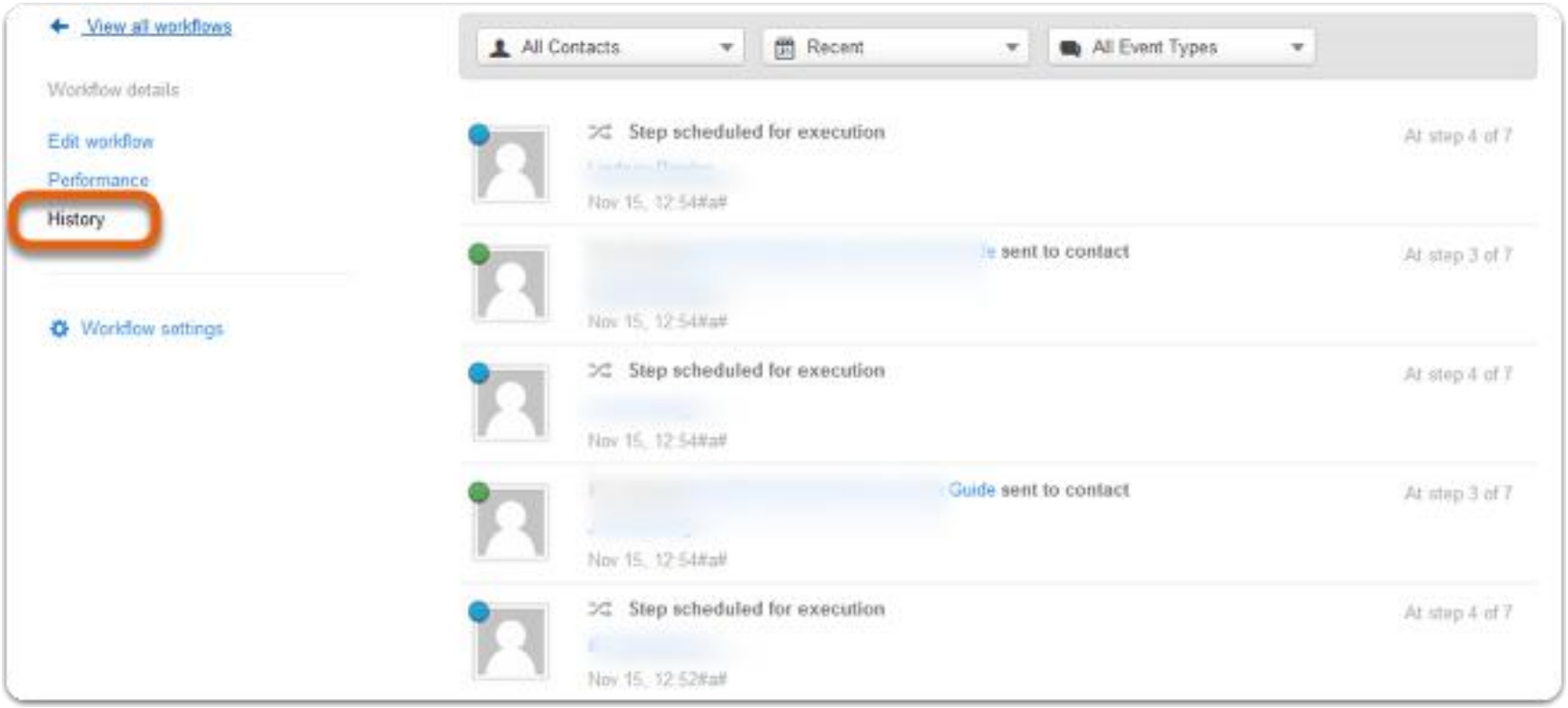
campaign performance metrics



Individual email CTR



Workflow history



Lead Nurturing Statistics

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

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

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

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)

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

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

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

Nurtured leads make **47% larger** purchases than non-nurtured leads. (Source: The Annuitas Group)

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WEBINAR
TASKS

Webinar Tasks

1. Setup Workflow in HubSpot using your Lead Nurturing Worksheet & activate the campaign
2. Add previous leads via static list if applicable
3. Analyze campaign after 25-50 leads have completed the workflow
4. Submit Workflow to clodolce@hubspot.com for review

Webinar Resources

1. How to set up a Lead Nurturing Campaign using Workflows
2. Lead Nurturing Workflow FAQ's
3. Intro to Workflows training Class
4. Workflows training class

QUESTIONS?

HubSpot Resources

1. http://forums.hubspot.com
2. http://help.hubspot.com
3. Settings > My Email Notifications

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THANK YOU.