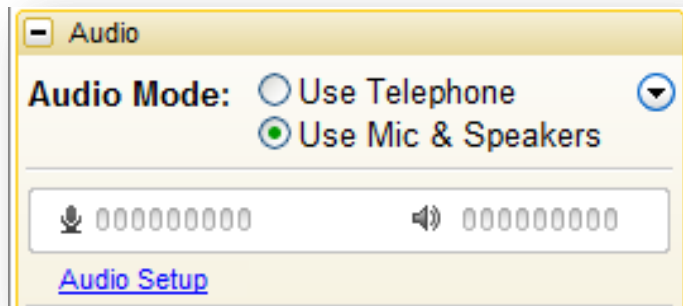


How to Create Qualified Leads with Lead Nurturing

#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





Mark Kilens

@MarkKilens

MAGGIE
GEORGIEVA

Product
Manager

@mgieva






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



1

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”

A large, orange, 3D-style graphic of the number 2. It has a thick, rounded body with a central white circle containing the number '2'. The graphic has a slight shadow and is positioned on the left side of the slide.

2

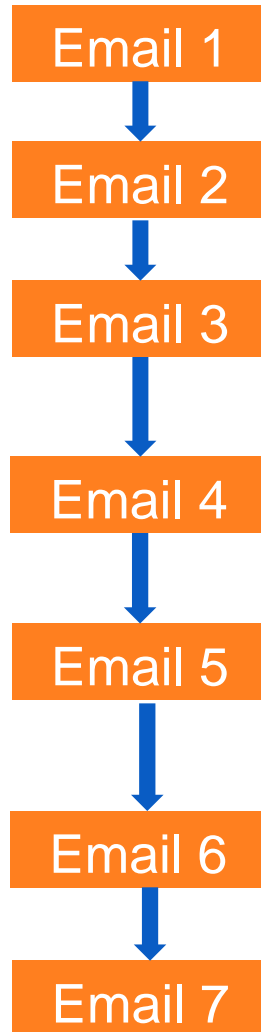
LIFECYCLE- BASED LEAD NURTURING APPROACH

Lifecycle-based lead nurturing approach

Perform Research Campaign

Perform Research List

- Downloaded X amount of perform research content
- Job Title = X
- Pages visited = X



Establish Buying Criteria Campaign

Establish Buying Criteria List

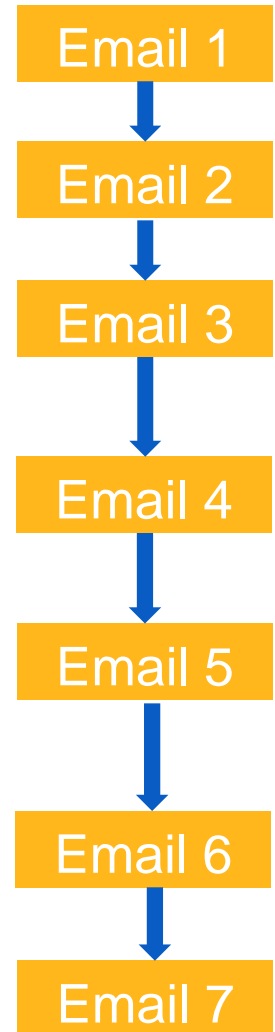
- Downloaded X amount of perform research content OR X amount of Establish Buying Criteria content
- Job Title = X
- Pages visited = X
- Visited X pages
- Received last email in perform research campaign



Evaluate Vendor Campaign

Evaluate Vendor List

- Downloaded X amount of Establish Buying Criteria content
- Job Title = X
- Pages visited = X
- Visited X pages
- Received last email in Establish Buying Criteria Campaign



Lifecycle-based lead nurturing approach

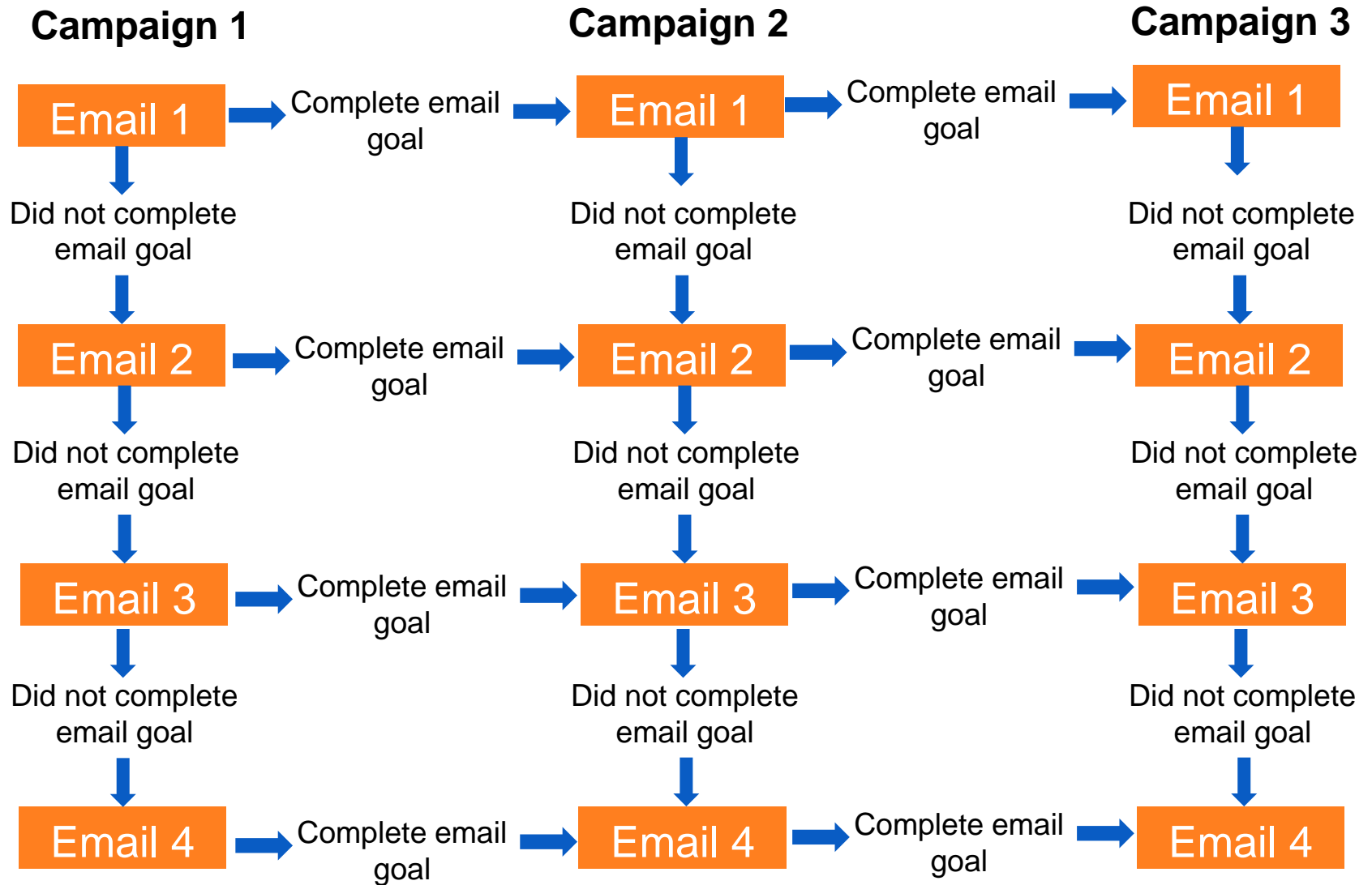
1. Strong understanding of the buying process & personas
2. Starting criteria will most likely be a Smart List including forms submitted, basic properties & possibly custom property values
3. The set of emails will be sent until the criteria of the list for the next stage of the buying process is met. 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

A large, stylized orange graphic on the left side of the slide. It features a central circle with the number '3' inside. Three lines branch out from this central circle: one goes up and to the left, one goes straight up, and one goes down and to the left. Each of these three lines ends in a smaller circle. The entire graphic has a slight shadow effect.

3

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 NURTURING 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.patientadvoca	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
2 day Delay

1 First Workflow Step

Delay this step for

2 Days

0 Hours

0 Min

You haven't added any actions to this step. You should [add one now](#)

Add Step



Select target persona for campaign

Director
Darren

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

Establish Buying Criteria

Prospect recognizes a need for a solution like yours.

Evaluate Vendors

Prospect seeks solutions to their need; ready to buy.



Smart List to start campaign

Lists Organize and segment your contacts [Tutorial](#)

Name your list

Perform Research - Director Level LN Campaign

Describe the contacts who should be in this list

Lead

has filled out

Whitepaper 1

+

-

Refine by: [time period](#)

AND

Job Title

contains the word

Director

+

-

AND

Number of Pageviews

is equal to

10

+

-

OR

Lead

has filled out

eBook 1

+

-

Refine by: [time period](#)

AND

Job Title

contains the word

Director

+

-

AND

Number of Pageviews

is greater than

10

+

-

Add "OR"

Save

[Import Contacts](#)

Breathe some life into an old list of contacts. We'll add social media info, and let you know when your leads revisit your site.

[View Imported Files](#)

View and manage previous list imports into your hub.

[Export Unsubs and Bounces](#)

Download a CSV of all email addresses that have opted out of, or have failed to receive, email messages.

[Manage Email](#)

Engage your contacts with email messages that they *want* to receive, and they'll love you for it.

Emails created for campaign

Sending

Email Send Date & Time

- ☒ Send email immediately
- ☐ Send email at a scheduled date and time
- ☐ Send email with automated workflows

Recipient lists for this email

Select existing lists or create a new list

Click here to add mailing lists to include in the email...



Create new...

Upload new...

Blocked recipient lists for this email (optional)

This email will not be sent to these people even if included in lists above. This is not your opt-out list. [Help](#)

Click here to add mailing lists to block from the email...



Create new...

Upload new...

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

  Workflow Settings

Internet Marketing Toolkit Campaign

1 First Workflow Step

Send email

Add Step

Workflow Settings

Workflow State

- ☐ Live
- ☒ Not Live

When should this workflow begin?

- ☒ Only the first time one of its Starting Conditions occurs.
- ☐ Any time one of its Starting Conditions occurs.

Execute steps on business days only?

- ☒ Yes
- ☐ No

Execute steps only within a certain time range?

- ☐ Yes
- ☒ No

From which other workflows should a contact be unenrolled when this workflow begins?

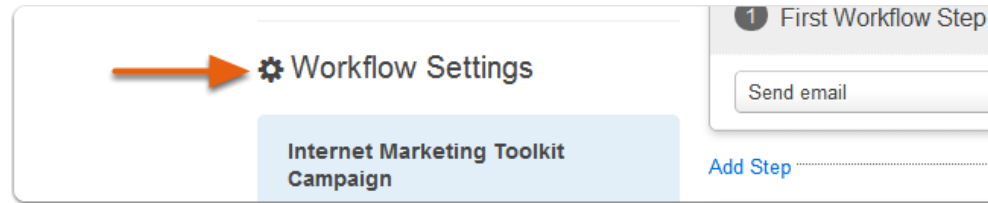
- ☐ All
- ☒ None
- ☐ Select specific campaigns

Active suppression lists for this workflow ?

Select a suppression list

Save changes

Settings: When should this Workflow begin



When should this workflow begin?

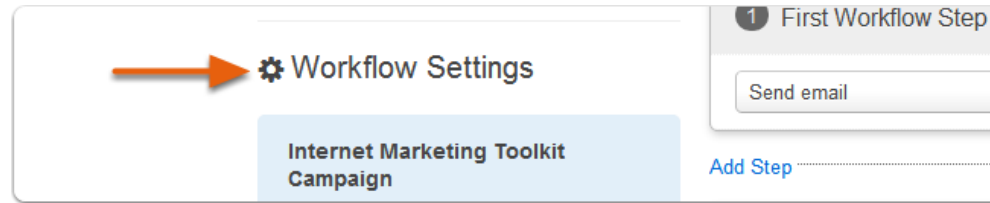
☒ Only the first time one of its Starting Conditions occurs.

☐ Any time one of its Starting Conditions occurs.

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?



Execute steps on business days only?

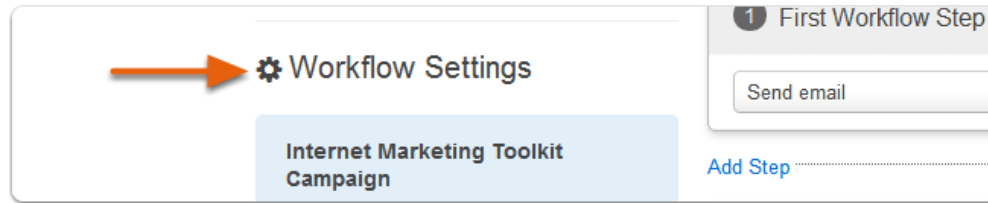
☒ Yes

☐ No

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?



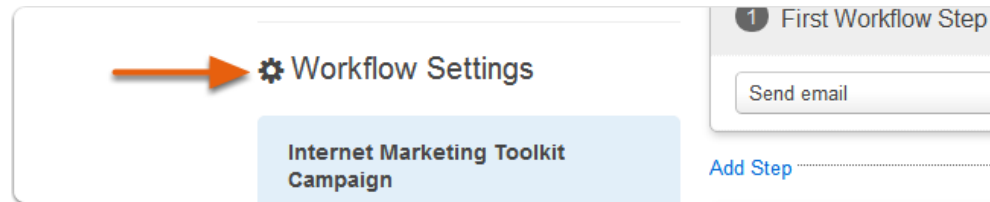
Execute steps only within a certain time range?

☒ Yes
☐ No

Execute steps between and

Email timing is based on
the portal time zone

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



From which other workflows should a contact be unenrolled when this workflow begins?

☒ All
☐ None
☐ Select specific campaigns

Active suppression lists for this workflow ?

Select a suppression list ▼

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



2

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

The image shows a workflow configuration interface with three steps. Each step has a title, a delay setting, and two dropdown menus. The delay settings for the second and third steps are highlighted with orange boxes.

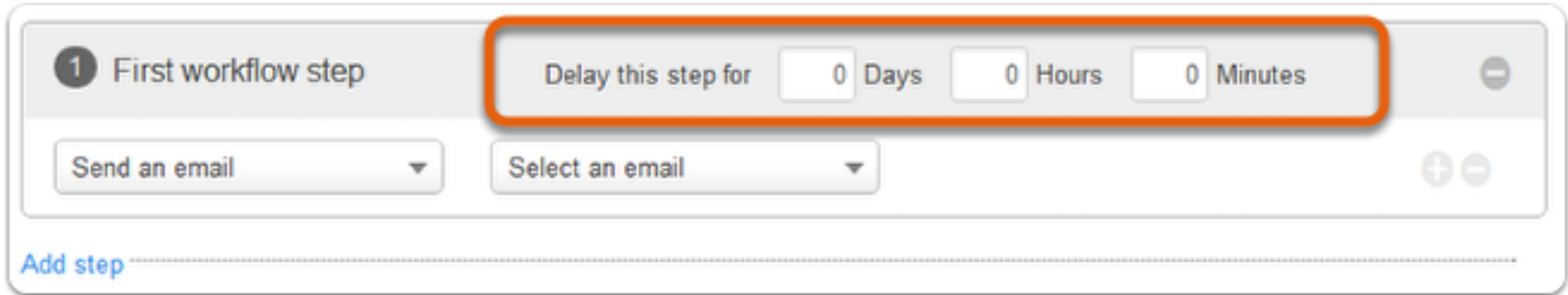
Step 1: First workflow step
Delay this step for Days Hours Minutes
Send an email Select an email

Step 2: Second workflow step
Delay this step for Days Hours Minutes
Send an email Select an email

Step 3: Third workflow step
Delay this step for Days Hours Minutes
Send an email Select an email

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?



The screenshot shows a workflow configuration interface. At the top, it says "1 First workflow step". To the right of this, there is a section labeled "Delay this step for" which is highlighted with an orange border. This section contains three input fields: "0 Days", "0 Hours", and "0 Minutes". Below the delay section, there are two dropdown menus: "Send an email" and "Select an email". At the bottom left, there is a link that says "Add step".

- 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

1 First workflow step Delay this step for 0 Days 0 Hours 0 Minutes

Send an email Select an email

Add step

2 Second workflow step Delay this step for 2 Days 0 Hours 0 Minutes

Send an email Select an email

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 screenshot displays a workflow configuration interface with three steps. Each step has a delay timer and two dropdown menus. The first step is labeled 'First workflow step' and has a delay of 0 Days, 0 Hours, and 0 Minutes. The second step is labeled 'Second workflow step' and has a delay of 2 Days, 0 Hours, and 0 Minutes. The third step is labeled 'Third workflow step' and has a delay of 2 Days, 0 Hours, and 0 Minutes. The delay settings for the second and third steps are highlighted with orange boxes. Below each step is a blue link labeled 'Add step'.

1 First workflow step Delay this step for 0 Days 0 Hours 0 Minutes

Send an email Select an email

Add step

2 Second workflow step Delay this step for 2 Days 0 Hours 0 Minutes

Send an email Select an email

Add step

3 Third workflow step Delay this step for 2 Days 0 Hours 0 Minutes

Send an email Select an email

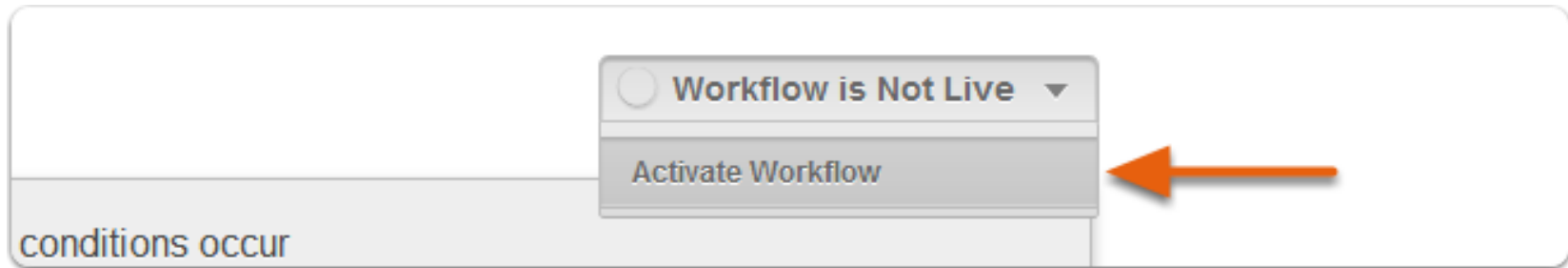
The next step of any workflow gets scheduled when the step before it executes.

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

Should HubSpot update this list over time?

☐ Yes, make a *smart list* ☒ No, make a *static list*

Would you like to populate this list based on filtering criteria?

☒ Yes, I'd like to provide criteria ☐ No, I will add contacts manually

Describe the contacts who should be in this list

☒ Within this time period: –

Step 2

LIST ACTIONS

[Archive All Contacts](#)

[Export List](#)

[Delete List](#)

Step 3

Workflows

Choose an automation workflow to execute on this list.

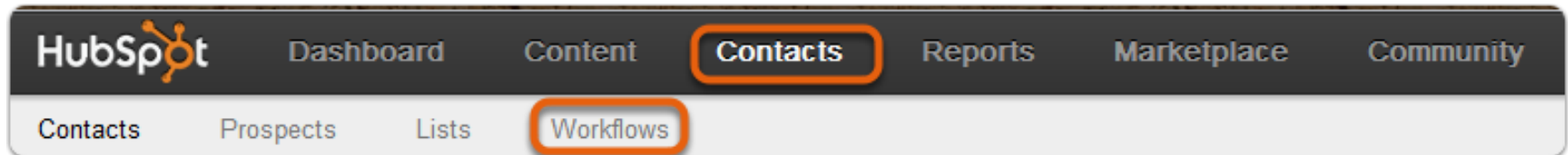
Press Esc to close









3

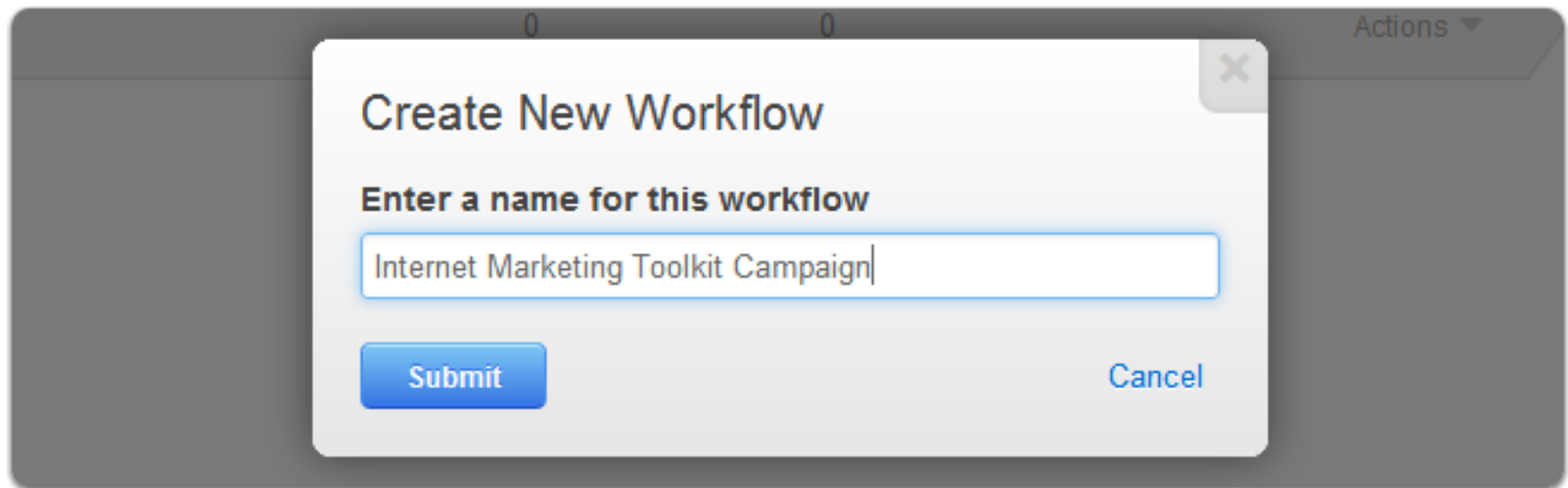
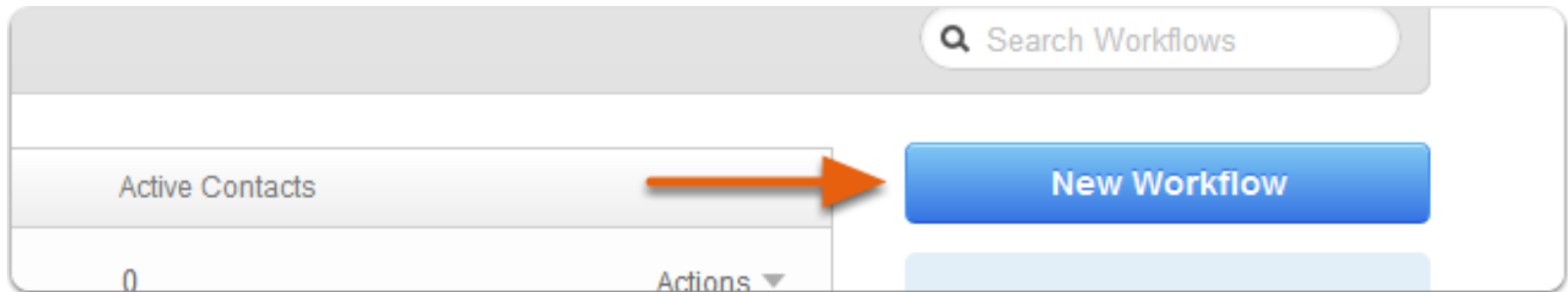
CREATING A
WORKFLOW

Go to the Workflows tool



-  [Manage Contact Lists](#)
Group your contacts into ultra-targeted segments.
-  [Manage Email](#)
Send the kinds of emails your contacts love to read.
-  [Manage Workflows](#)
Let workflows handle your most valuable routine tasks.
-  [External Forms](#)
Make better forms, gather more data, convert more contacts.
-  [Import Contacts](#)
Breathe new life into old lists.
Updated data is happy data.
-  [Manage Settings](#)
Bend the universe to your will.
Start with your software.

Create a new Workflow



3 types of starting conditions

Begin this workflow when:

No starting condition ▲

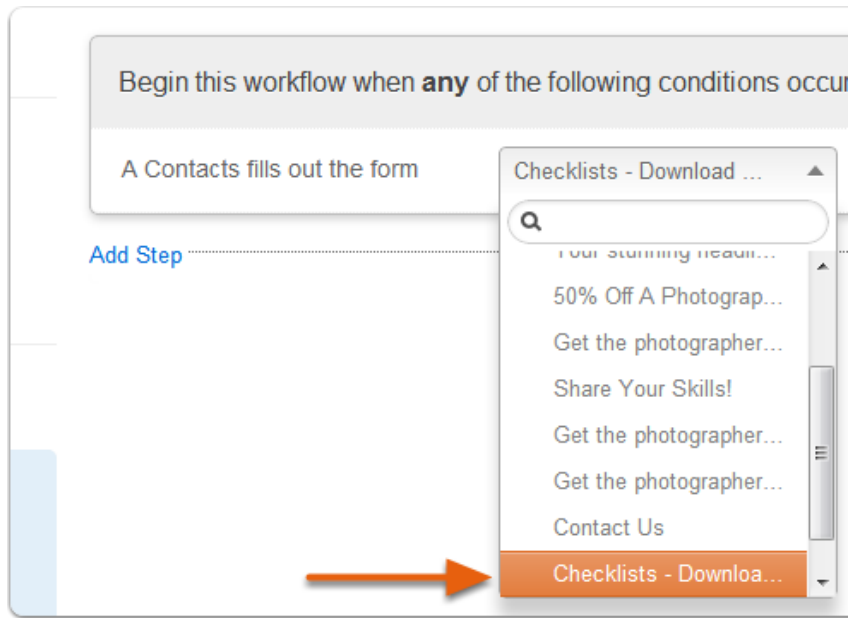
Ad

Q |

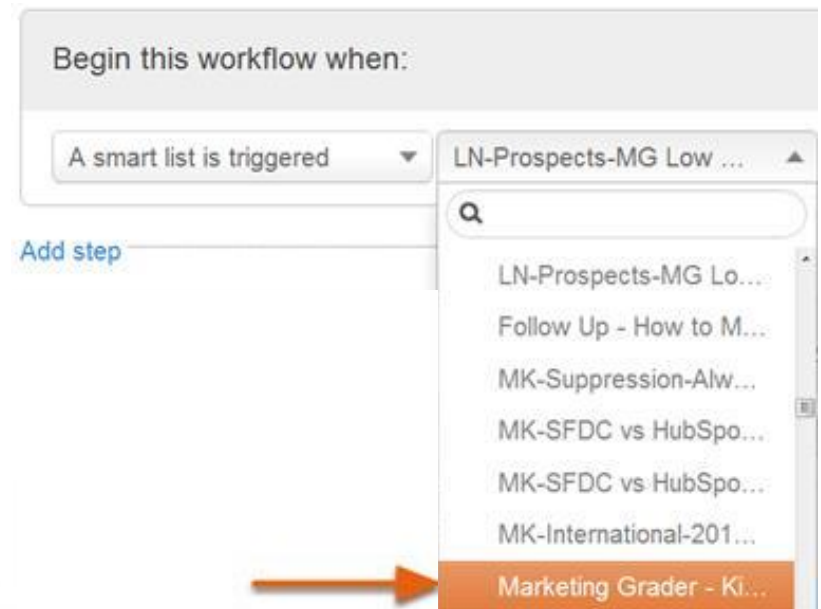
- A form is submitted
- A smart list is triggered
- No starting condition

Select starting condition(s)

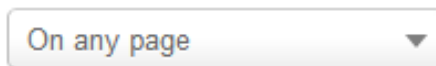
Option 1: Form is Submitted



Option 2: Smart List is Triggered




Select + for multiple starting conditions




Add a step & set delay for the step

Begin this workflow when **any** of the following conditions occur

A Contacts fills out the form Checklists - Download ... On any page

 [Add Step](#)

1 First Workflow Step Delay this step for 2 Days 0 Hours 0 Min

You haven't added any actions to this step. You should [add one now](#) 

[Add Step](#)

Select action & email to send

1 First workflow step Delay this step for 0 Days 0 Hours 0 Mi

Select an action ▲

- Send an email
- Set a contact property value
- Add to/Remove from a list
- Increment a numeric property ...
- Copy a contact property value
- Trigger a webhook
- Send an email notification
- Send an SMS (text message)


1 First Workflow Step Delay this step for 2 Days 0 Hours 0 Mir

Send email ▼

Select email to send ▲

- Coupon Follow-Up
- 50% Off - Checklist Promo
- Share Your Skills

Add Step



Save your Workflow

⚙ Workflow Settings

Internet Marketing Toolkit Campaign

Begin this workflow when...

- A form is submitted

1 First Workflow Step

- Email Send

2 Second Workflow Step

- Email Send



Save Workflow

Send email ▼

Add Step

2 Second Workflow Step


Send email ▼

Add Step

2 ways to launch your Workflow

[Return to All Workflows](#)

Workflow Details

 Steps

Performance

History

Workflow Settings


Workflow State
☐ Live
☒ Not Live

When should this workflow be triggered?
☒ Only the first time one of its

☐ Workflow is Not Live ▼

Activate Workflow

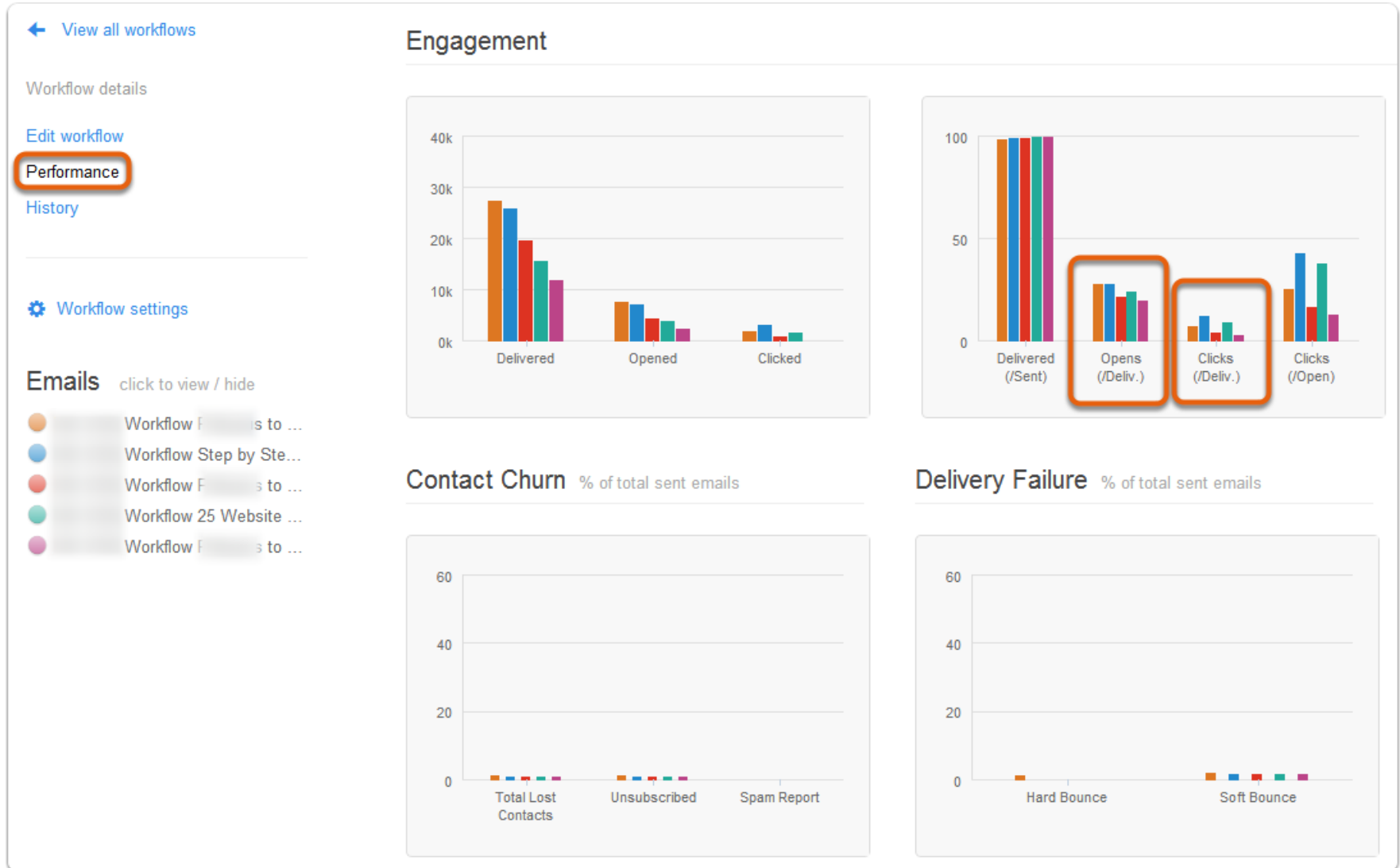
conditions occur



4

EMAIL & LEAD
NURTURING
CAMPAIGN
ANALYTICS

campaign performance metrics



Individual email CTR

[← View all workflows](#)

Workflow details

[Edit workflow](#)

Performance

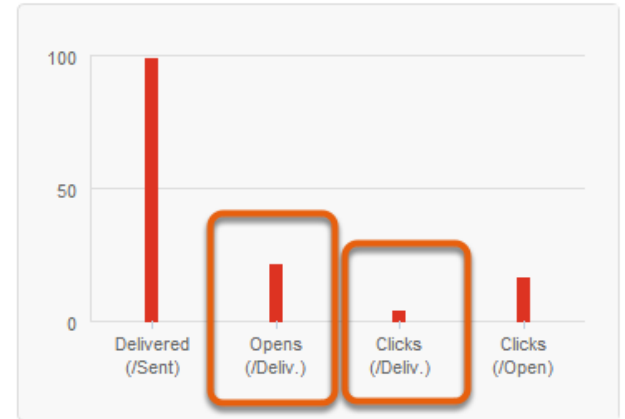
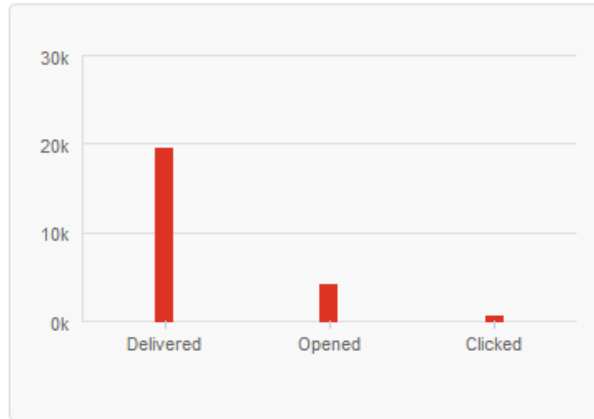
[History](#)

[⚙ Workflow settings](#)

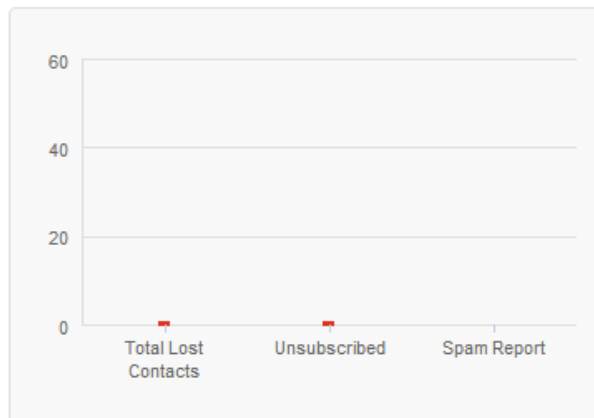
Emails [click to view / hide](#)

- ☐ Workflow F...s to ...
- ☐ Workflow Step by Ste...
- ☒ Workflow F...s to ...
- ☐ Workflow 25 Website ...
- ☐ Workflow F...s to ...

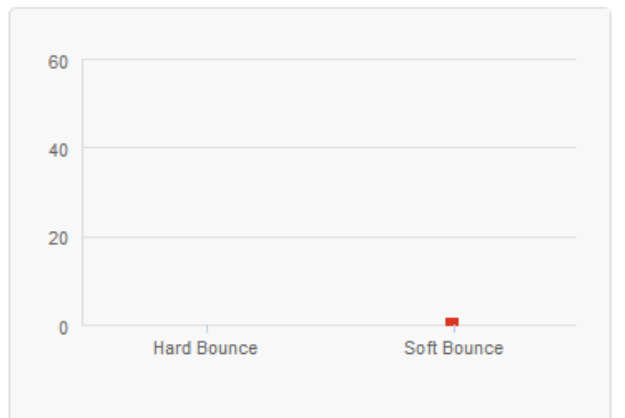
Engagement



Contact Churn % of total sent emails



Delivery Failure % of total sent emails



Workflow history

The screenshot displays a user interface for viewing workflow history. On the left, a sidebar contains navigation links: 'View all workflows', 'Workflow details', 'Edit workflow', 'Performance', 'History' (highlighted with an orange border), and 'Workflow settings'. The main area features three filters at the top: 'All Contacts', 'Recent', and 'All Event Types'. Below these, a list of workflow steps is shown for a contact named 'Nov 15, 12:54#a#'. Each step includes a status icon (blue or green), a description, and a progress indicator. The steps are as follows:

Status	Description	Progress
Step scheduled for execution	Nov 15, 12:54#a#	At step 4 of 7
Guide sent to contact	Nov 15, 12:54#a#	At step 3 of 7
Step scheduled for execution	Nov 15, 12:54#a#	At step 4 of 7
Guide sent to contact	Nov 15, 12:54#a#	At step 3 of 7
Step scheduled for execution	Nov 15, 12:52#a#	At step 4 of 7

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 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)

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

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



5

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



Want to Watch Previous Webinars?

-**1** <http://academy.hubspot.com/webinars/>
-**2** Watch webinar recordings
-**3** Download webinar slides
-**4** Download webinar resources



THANK
YOU.