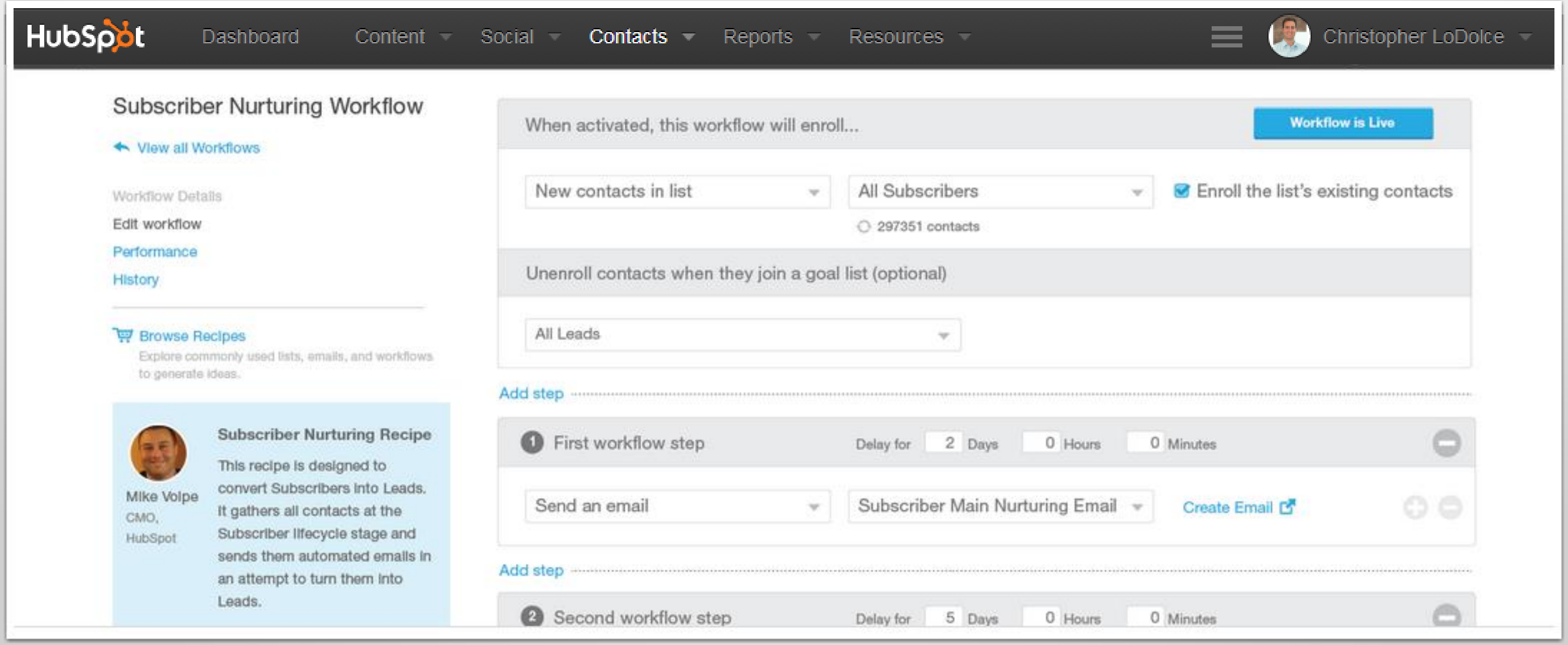
WHY USE WORKFLOWS FOR LEAD NURTURING?

First, what is a Workflow?

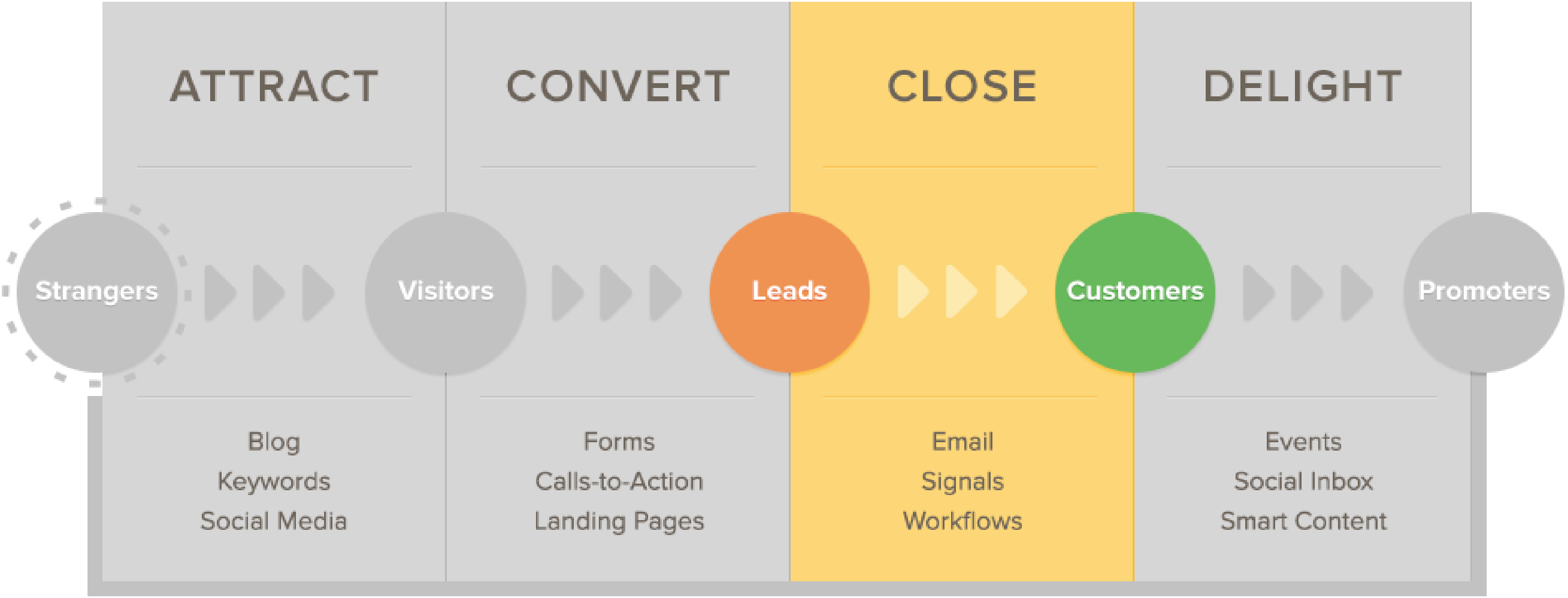
Workflows give you the ability to automate your marketing to actual people, not clicks and opens.



Second, what is lead nurturing?

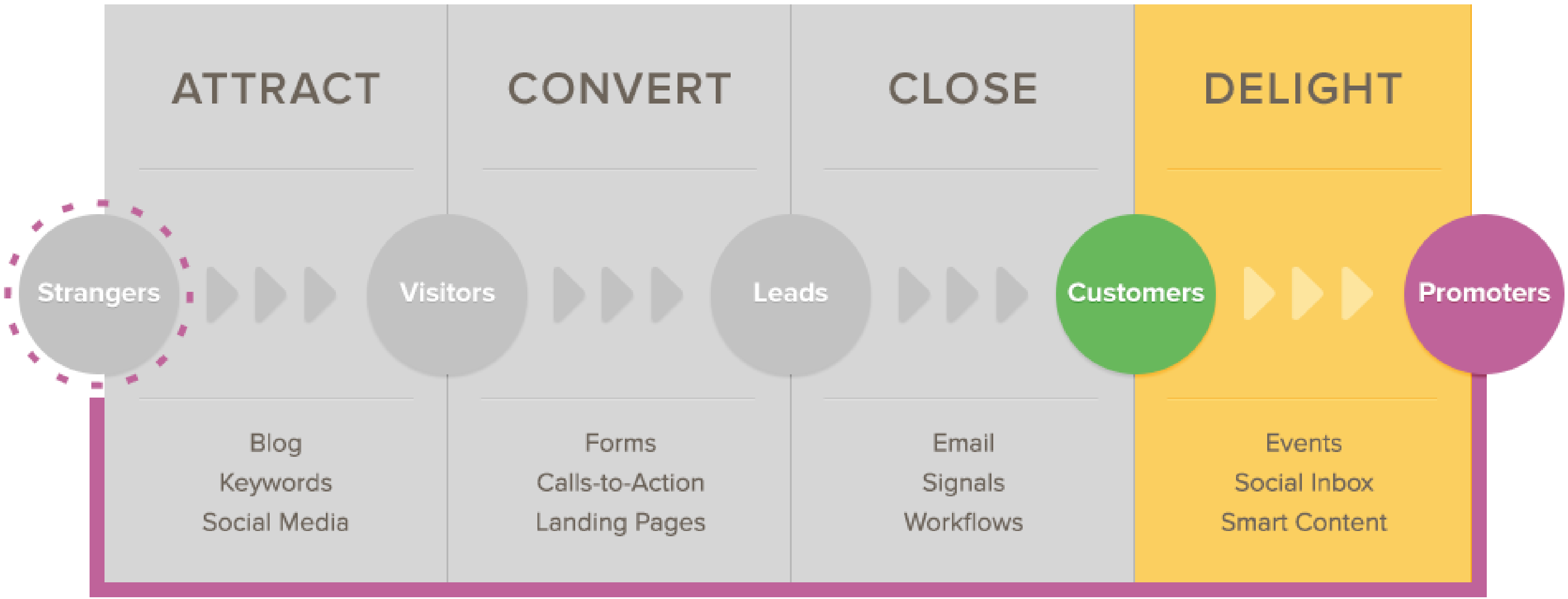
Lead nurturing is the practice of engaging with contacts via automated touches to build a relationship; with the end goal of closing more educated and qualified customers faster.

Inbound Methodology



by HubSpot

Inbound Methodology



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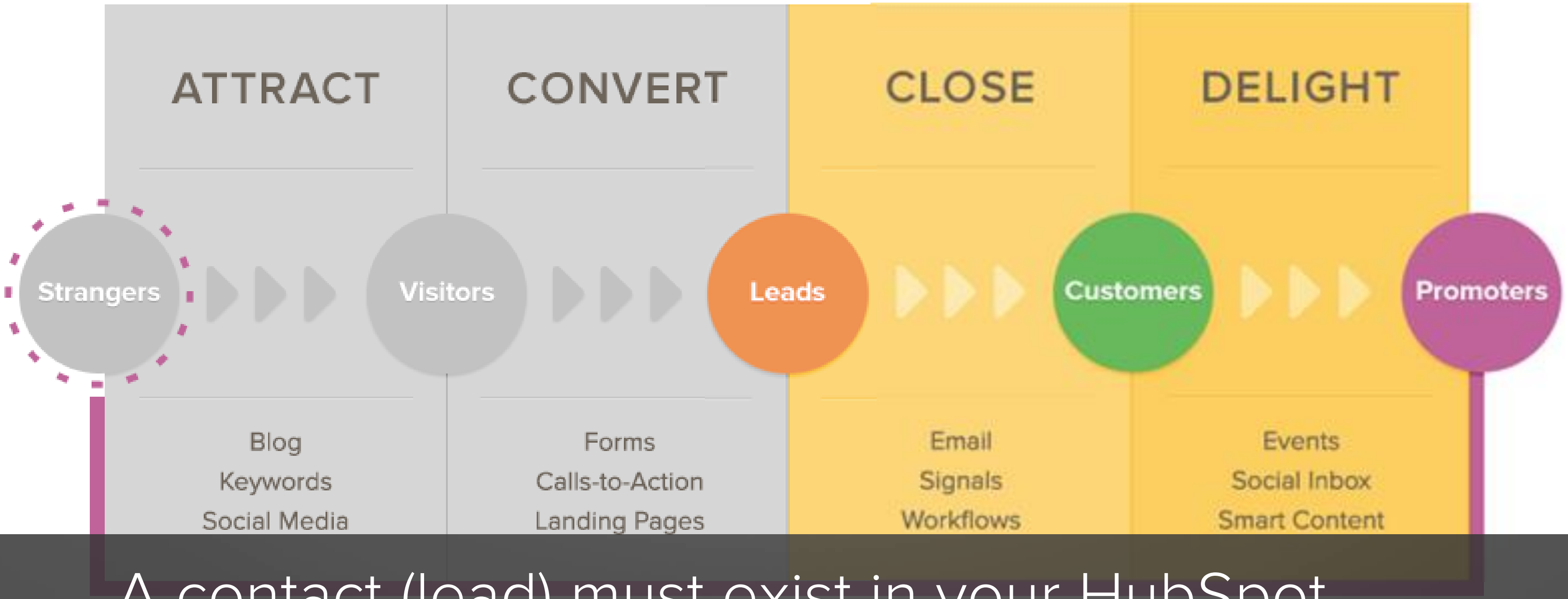
Inbound Methodology



A contact (lead) must exist in your HubSpot Contacts database for the Workflow to function.

BUYER PERSONAS

Semi-fictional representations of your ideal customer based on real data and some select educated speculation about customer demographics, behavior patterns, motivations, and goals.

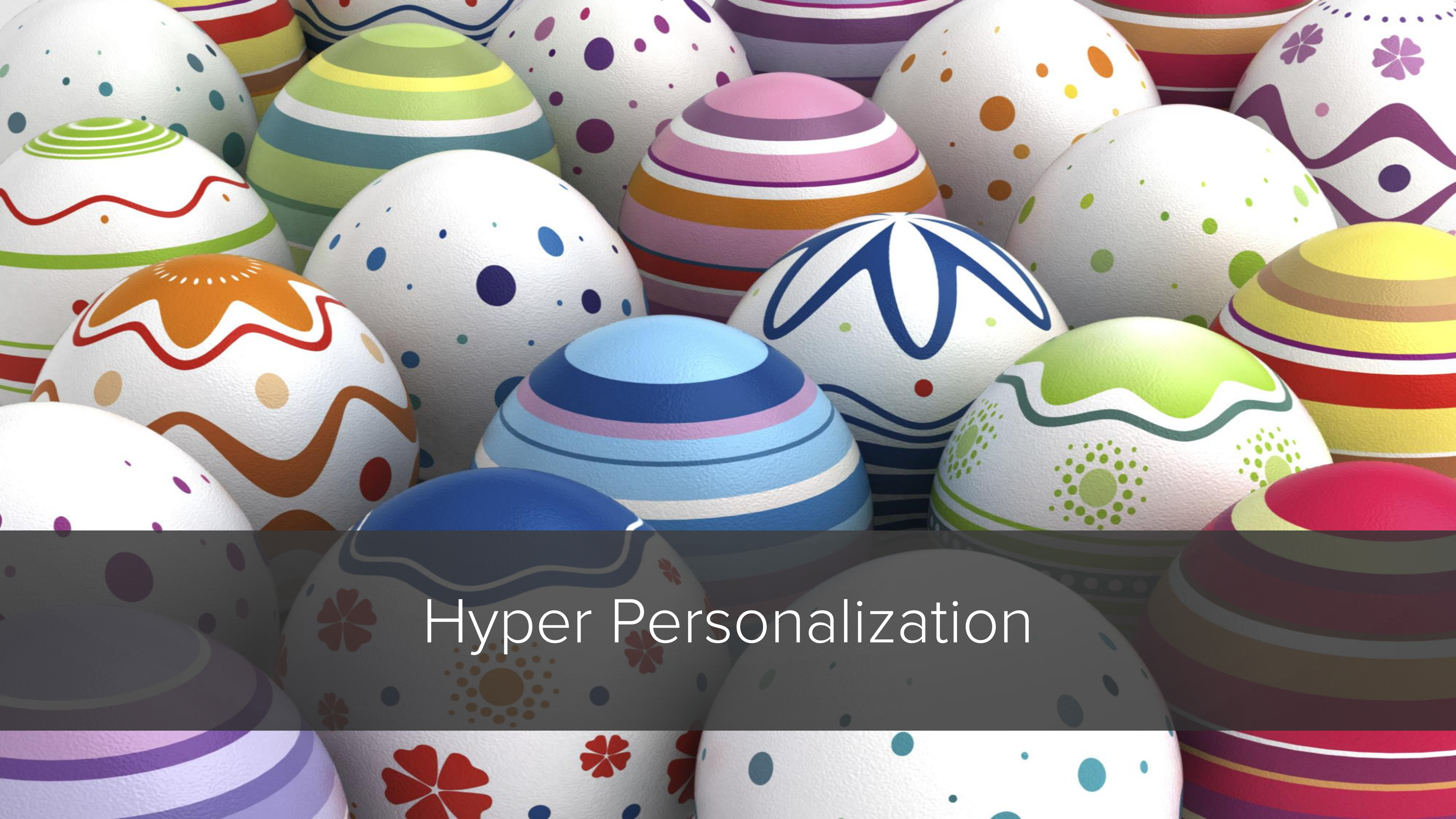
THE BUYER'S JOURNEY

BUYER STAGES	AWARENESS	CONSIDERATION	DECISION
User Behavior	Have realized and expressed symptoms of a potential problem or opportunity	Have clearly defined and given a name to their problem or opportunity	Have defined their solution strategy, method, or approach
Research & Info Needs	Research focused on vendor neutral 3rd party information around identifying problems or symptoms	Committed to researching and understanding all of the available approaches/methods to solving their defined problem or opportunity	Researching supporting documentation, data, benchmarks or endorsements to make or recommend a final decision
Content Types	Analyst reports Research reports eGuides & eBooks Editorial content Expert content White papers Educational content	Comparison white papers Expert Guides Live interactions Webcase/podcast/video	Vendor comparisons Product comparisons Case Studies Trial Download Product Literature Live Demo
Key Terms	Troubleshoot Issue Resolve Risks Upgrade Improve Optimize Prevent	Solution Provider Service Supplier Tool Device Software Appliance	Compare Vs. versus comparison Pros and Cons Benchmarks Review Test
Example	I have a sore throat, fever, and I'm achy all over. What's wrong with me?	Aha! I have strep throat. What are my options for relieving or curing my symptoms?	I can see a primary care physician, ER, nurse or clinic. The ER costs $$$, but are the fastest & I have insurance.

3 PILLARS TO LEAD NURTURING WORKFLOWS.

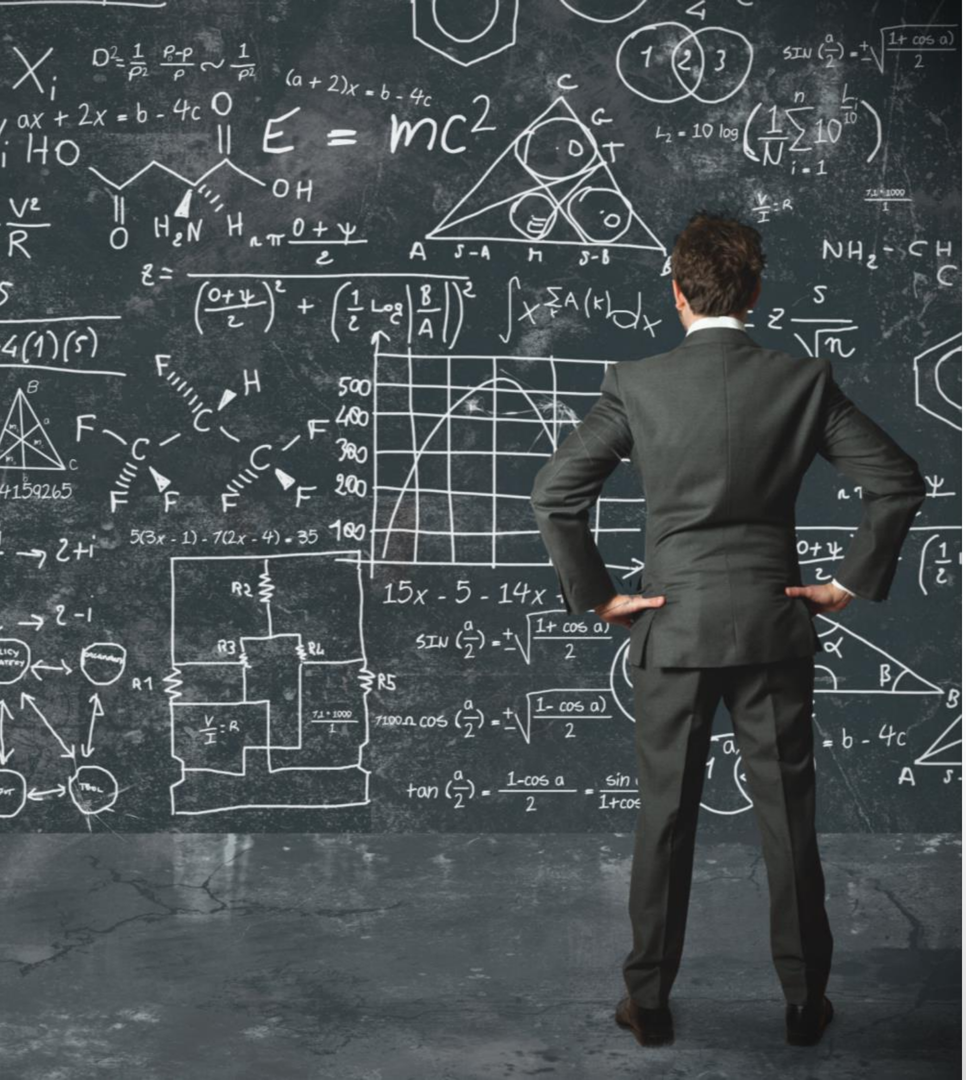
Grow and Nurture Relationships

Educational Content



Hyper Personalization

LEAD NURTURING WORKFLOW LOGIC BEST PRACTICES.



CREATE THE LOGIC OF YOUR WORKFLOW

Before attempting to build your Workflow and the associated lists/emails it is critical that you map out the steps that will guide your contacts to your intended goal.

LEAD NURTURING WORKFLOW LOGIC BEST PRACTICES

- Identify the goal of the workflow
- Identify which contacts should be enrolled in your workflow
- Select appropriate number and type of emails to send
- Choose time delay between emails sent
- Identify contacts to suppress from your workflow

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THERE ARE LOTS OF DIFFERENT GOALS/PURPOSES FOR WORKFLOWS….

- **Move leads further through the buyer's journey (lead nurturing)**
- Set a custom contact property to identify contacts as specific personas
- Add/remove contacts from specific lists based on actions they take
- Send emails internally with information about contacts

IDENTIFY THE GOAL FOR THE WORKFLOW

Every lead nurturing Workflow that you build should have a specific goal focused around a meaningful action the contact takes.

LEAD NURTURING WORKFLOW GOAL

- Each lead nurturing Workflow you create should only have one intended outcome.
- The goal should be finite and trackable with a Smart List.
- There should never be any gray area as to if the goal was completed or not.

SET WORKFLOWS GOALS SPECIFIC TO LIFECYCLE STAGES

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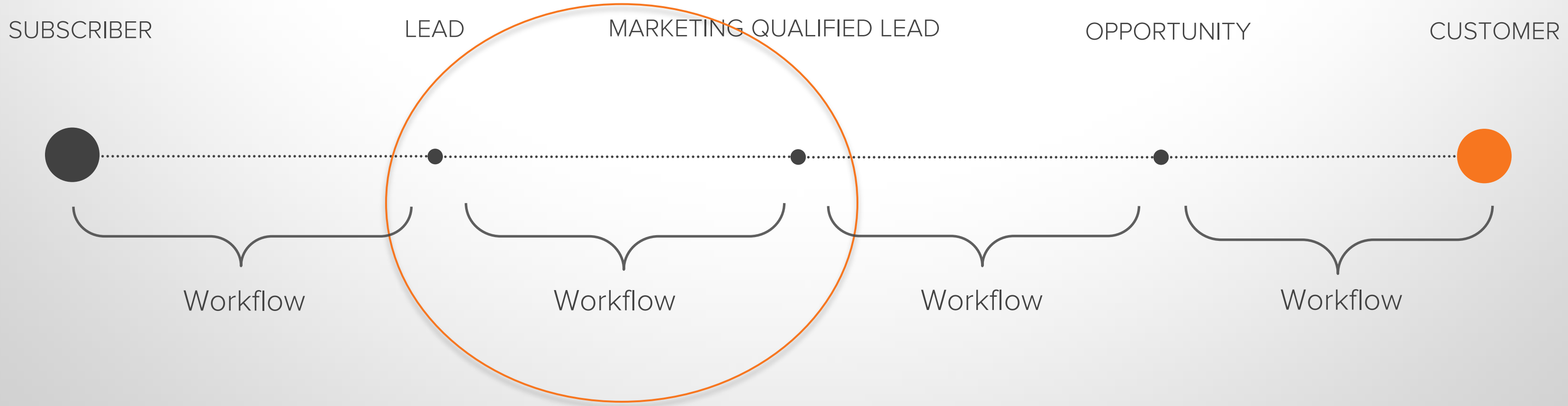
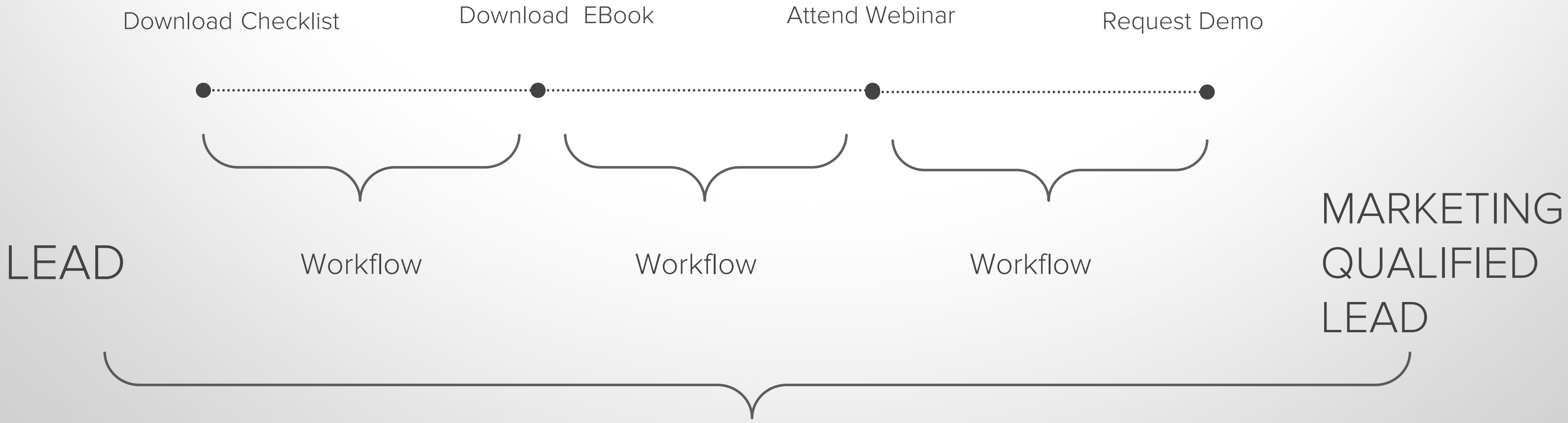


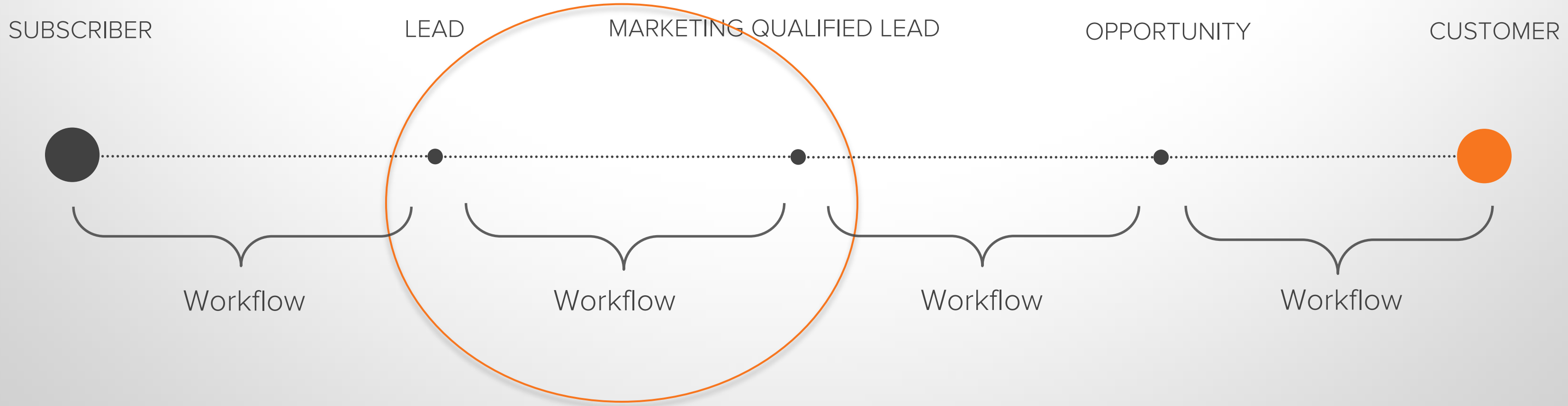
CREATE WORKFLOWS WITH GOALS WITHIN A LIFECYCLE STAGE FOR LONGER SALES CYCLES



EXAMPLE GOALS FOR INDIVIDUAL WORKFLOWS WITHIN A LIFECYCLE STAGE

- GOAL = Contact download EBook
- GOAL = Contact attend Webinar
- GOAL = Contact request a demo
- GOAL = Contact request conversation with admissions team
- GOAL = Contact signs up to attend charity event
- GOAL = Contact has **submitted form** "Request Demo" *AND* **contact property** lifecycle stage equal to lead *AND* **contact property** job title equal Director of HR *AND* **List Membership** contact "is not a member of" competitors

SET WORKFLOWS GOALS SPECIFIC TO LIFECYCLE STAGES



MAPPING OUT WORKFLOW LOGIC VISUALLY

GOAL

Submitted Form: Request Demo

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IDENTIFY WHICH CONTACTS SHOULD BE ENROLLED IN YOUR WORKFLOW

It Is important to clearly define the group of contacts you will be communicating with to ensure you can provide the right information in the right context to build a relationship and educate the contact.

IDENTIFY WHICH CONTACTS SHOULD BE ENROLLED INTO YOUR WORKFLOW

- All contacts that have **submitted form** “Whitepaper XYZ”
- All contacts where **contact property** lifecycle stage equal to lead
- All contacts where **contact property** number of employees equal 51-100
- All contact who are members of “ABC” list
- All contacts that have **submitted form** “whitepaper XYZ” *AND* **contact property** lifecycle stage equal to lead *AND* **contact property** number of employees equal 51-100

MAPPING OUT WORKFLOW LOGIC VISUALLY

Enrollment Criteria

Submitted Form: Whitepaper XYZ

Goal

Submitted Form: Request Demo

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SELECT APPROPRIATE NUMBER OF EMAILS TO SEND

The appropriate number of emails to send will depend on the persona(s) that will be enrolled in the Workflow.

LEAD NURTURING SPECIFIC EMAIL BEST PRACTICES

- Keep your emails short, simple and relevant
- Make sure the subject line is relevant to the action the contact took to get enrolled in the Workflow
- Always include 2 text links or HubSpot CTA to the same webpage
- Personalize the context of the email based on enrollment criteria

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

Email Type 1: Goal = Build Trust/Conditioning

- The purpose of this type of email is to establish relevancy and build trust with the lead.
- The email should make reference to why you are reaching out to them and provide useful content blogs.
- When executed well, you will condition your contacts to open future emails because trust there is something of value in the email.

Email Type 2: Goal = Additional Downloads

- In this email type we want to begin to draw a connection between the topic of your workflow and the benefits your solution provides.
- This could be in the form of a premium content download (whitepapers, Ebooks, webinars, case study, etc.
- You are allowing them to consume your resources to further understand your organizations value.
- You are not yet selling them here or explicitly stating why they should commit resources to your organization.

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Email Type 3: Goal = Goal Action

- By now, those contacts that are engaged will trust you and are beginning to understand the value your organization can provide.
- Now is the time that we position your goal of the Workflow as the next logical action for the contact to take.
- Position this step as still part of their discovery process focused on them learning/understanding in greater detail how you organization can be of value.

Email Type 4: Goal = Breakup/Goal Action

- The break-up email is designed to make it clear this is the last email they will be receiving in conjunction with xyz topic you have been emailing them about.
- Here our goal is to simply get them to stay somewhat engaged. Your CTA here will be to subscribe to your blog or newsletter.
- Use a P.S. as a last ditch effort for someone to complete the goal you have set for the Workflow.

MAPPING OUT WORKFLOW LOGIC VISUALLY

Enrollment Criteria

Submitted Form: Whitepaper XYZ

Build Trust

Send Email

Build Trust

Send Email

Additional Download

Send Email

Soft Goal Action

Send Email

Hard Goal Action

Send Email

Breakup Goal Action

Send Email

Goal

Submitted Form: Request Demo

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CHOOSE TIME DELAY BETWEEN EMAILS

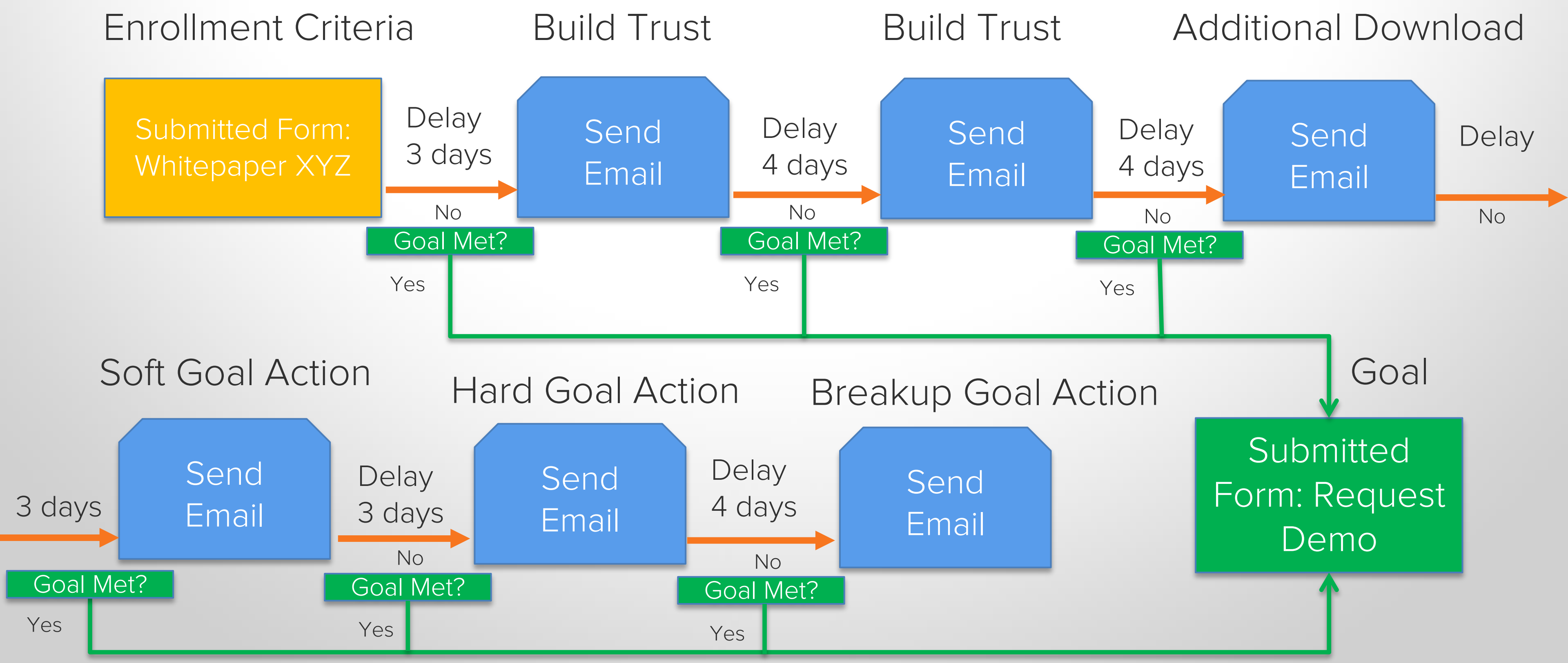
- Timing is always important when nurturing your leads. You can easily upset people by emailing them too much or too little.

- There is a delicate balance when playing with the timing of your emails, and your best bet is to experiment to figure out what works best.

CHOOSE TIME DELAY BETWEEN EMAILS

- Recall who will be enrolled in this Workflow, does your company have any information on their email habits?
- Is there any research specific to your industry that suggests the appropriate timing between emails?
- Experiment, experiment, experiment
- Don’t wait months before you begin nurturing leads

MAPPING OUT WORKFLOW LOGIC VISUALLY



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Flicker username tamasrepus

IDENTIFY CONTACTS TO SUPPRESS FROM YOUR WORKFLOW

If there is a segment of your contacts database you don’t want in your Workflow, identify the group or groups to suppress.

IDENTIFY CONTACTS TO SUPPRESS FROM YOUR WORKFLOW

- Customers
- Opportunities
- Competitors
- Contacts that a specific product or service is not relevant for

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