

What is **smart content**?

Smart content delivers **the right content**, to **the right people**, at **the right time**. It's available in the Professional and Enterprise level accounts.



94%

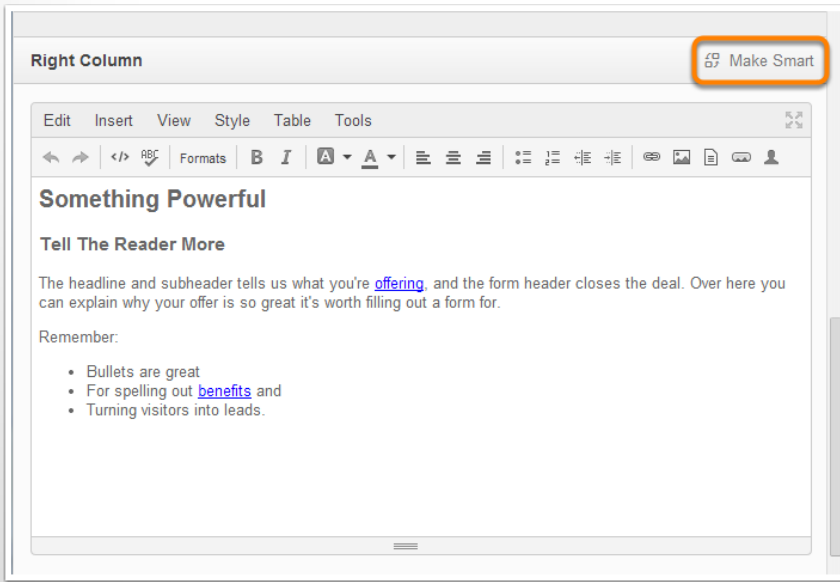
of businesses agree that
personalization is “critical to
current and future success”

(Source: Econsultancy + Monetate)

72%

“understand the importance of personalization but don’t know how to do it”

(Source: Econsultancy + Monetate)



Smart Text



Smart Calls-to-Action



Smart Form Fields



Contact Us

About Us

Resources

Search Our Site...



Get what you want. Choose your role.



CEO



SALES
LEADER



MARKETING
LEADER



SALES OPS/
SALES
ENABLEMENT



HR
LEADER



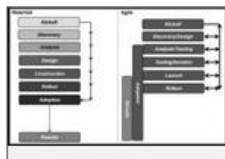
SALES
REP

[Contact Us](#)[About Us](#)[Resources](#)

Just In From The SBI Marketing Leader Blog



Is Your Marketing Team Ignoring Existing Clients?

[Read Post](#)

CMO: Is Your 2014 Marketing Plan Obsolete?

[Read Post](#)

Top 5 Priorities for CMO - CSO Alignment

[Read Post](#)

The Sabermetrics of the New CMO

[Read Post](#)

Meghan
Marketing
Leader

[>> View Other Roles](#)

How Marketing Fails by Failing to Market Itself



The CMO's Achilles' Heel



How to Sell Marketing to your CEO



CMO: Why Don't Your Prospects Care?

[Contact Us](#)

19%

uplift in sales from companies
using personalization

(Source: Econsultancy + Monetate)

HubSpot Dashboard Content Social **Contacts** Reports Partner Resources

Contacts Tutorial Overview Video

All lists Search...

Contact	Created On	Lifecycle Stage	Email
Amanda Young	3/3/2014	Lead	amanda.c.young_15@dartmouth.edu
Myles Olson	2/27/2014	Subscriber	mgo@airsprint.com
Lauren Pedigo	2/27/2014	Subscriber	lpedigo@hubspot.com
Matthew Vincenty	2/27/2014	Subscriber	mvincenty@hubspot.com
Daniel Madden	2/27/2014	Subscriber	dmadden@hubspot.com
Amy Carroll	2/27/2014	Subscriber	aecarroll@hubspot.com
Rachael O'Higgins	2/27/2014	Subscriber	rohiggins@hubspot.com
Emil Sit	2/27/2014	Subscriber	esit@hubspot.com
Luke Driscoll	2/27/2014	Subscriber	ldriscoll@hubspot.com
Farid Jahanmir	2/27/2014	Subscriber	fjahanmir@hubspot.com
Grigorios Chomatas	2/27/2014	Subscriber	gchomatas@hubspot.com
Mark Metcalf	2/26/2014	Lead	mmetcalf+socialmtest@hubspot.com
Alyson Isaac	2/23/2014	Lead	alysonisaac@gmail.com
Ryan Dillis	2/19/2014	Subscriber	rdillis@hubspot.com

Add New Contact

Import Contacts

3,249
Total contacts

4d ago
Last contact added

Click a row in the table to get a quick summary of that contact.

- 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.
- Forms**
Make better forms, gather more data, convert more contacts.
- Manage Settings**
Bend the universe to your will.

Smart content is built on top of the **Contacts database**

It can recognize which contact is looking at a page and display content tailored to them.

Visitors opt-in
by completing
a form or making
a purchase.
When they do, the Contacts
database begins to store
information about them.

Request a Demo With UrbanBound URBANBOUND

A comprehensive web-based relocation platform for employers and employees alike.

Your employees are your company's most important asset. Give them the relocation assistance they deserve.

What UrbanBound does for you:

- Keeps your employees on track in their move with a personalized checklist.
- Connects your employees to top-tier vendors, and offers them exclusive pricing.
- Provides your employees with a multitude of educational resources that teach them about their new location, allowing them to feel at home once they've arrived.
- Helps your employees keep track of expenses, and allows you to learn from their spending.
- Educates your employees about relocation tax laws, saving them money in the process.
- Allows you to stay up to date with your employee's progress as they go through their move.
- Gives added incentive to your job offers, and increases your offer to acceptance ratio.

Sign up for a demo and begin learning how UrbanBound can save you and your employees both time and money while relocating.



Schedule a Demo of UrbanBound Today!

First Name *

Last Name *

Email *

Company Name *

Job Title *

Phone Number *

Number of Employees *
- Please Select - ▾

Industry *
- Please Select - ▾

When do you have 30 minutes available to demo UrbanBound? *

- Subscribe to UrbanBound's Relocation Blog

[Schedule my demo!](#)

The image shows a screenshot of a web editor interface. At the top right, there is a button labeled "Make Smart" with a small icon, which is highlighted with an orange border. Below this is a menu bar with options: Edit, Insert, View, Style, Table, Tools. Underneath the menu bar is a toolbar with various icons for text formatting (bold, italic, text color, background color), alignment, bulleted and numbered lists, link, image, document, video, and user. The main content area contains the following text:

Something Powerful

Tell The Reader More

The headline and subheader tells us what you're [offering](#), and the form header closes the deal. Over here you can explain why your offer is so great it's worth filling out a form for.

Remember:

- Bullets are great
- For spelling out [benefits](#) and
- Turning visitors into leads.

Use what you know about that contact to provide
relevant, targeted, personalized content.

Have a website that
never gets old.

Smart content allows you to create a remarkable user experience by showing new and relevant content.



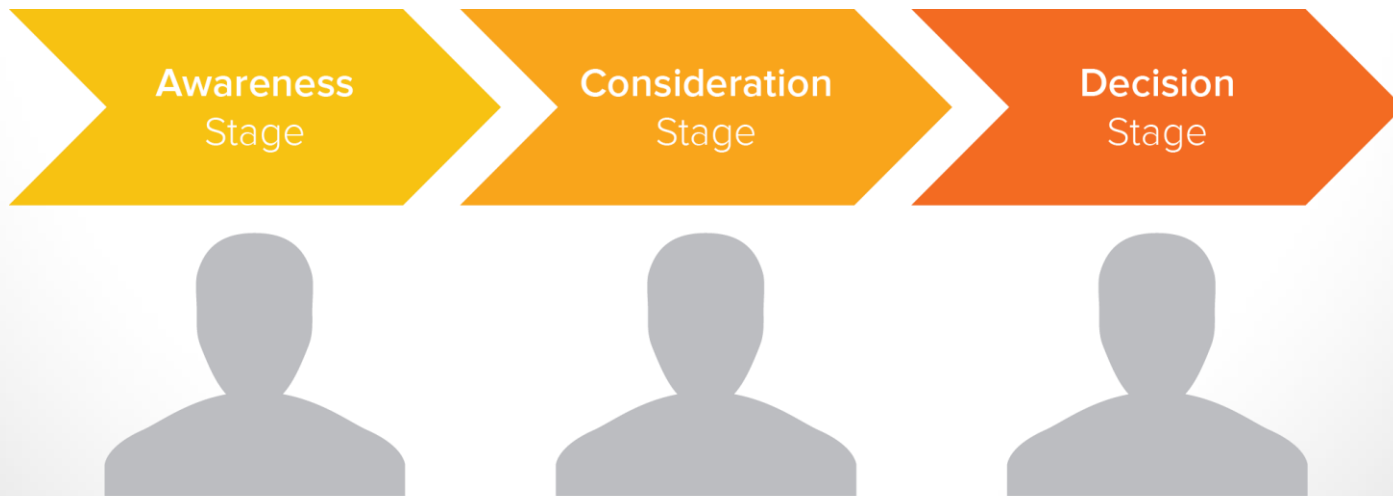


Be the company that
cares about its users.

You're thinking about your users and delivering the content that they actually need.



Smart Content **increases conversion rates.**



Smart Content **aligns with the right stage of the Buyer's Journey.**

This lets you guide users further along the buying process, increasing conversions.



Smart Content **promotes new offers.**

This gives you an opportunity to boost conversions.

Smart Content **cuts the number of steps** to a conversion.

Offer relevant content instead of making users search for it, and never ask the same questions on a form twice.



SETTING UP SMART CONTENT

- Pick your segments.
- Set up Smart Lists for segments.
- Decide which channel to place smart content on.
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Pick your segments.

- 1 Lifecycle-based segments
- 2 Persona-based segments
- 3 Activity-based segments



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HubSpot Dashboard Content Social Contacts Reports Partner Resources Dora De Kenessey

Contacts

Contacts Settings Customize HubSpot Contacts to fit your business

Main Options

- Contact Properties
- Account Properties
- Display Options
- Custom Lead Scoring
- Lifecycle Stages**

Salesforce Connector

- Status
- Settings
- Contact Field Mappings
- Account Field Mappings
- Import from Salesforce
- Help

Zapier

Subscriber

Think of **subscribers** as those folks who know about you and have opted in to hear from you periodically. In many cases your subscriber base is the segment of your contacts database that has only signed up for your blog or newsletter and nothing else. You should nurture a long-term relationship with subscribers and offer them content that will increase the chances that they will move forward in the customer lifecycle.

Lead

Leads have shown more interest in what you offer than subscribers have. Typically a lead has filled out a form with more than just an email address, often for some sort of content-based offer on your website. We see companies use the *lead* lifecycle stage for what we think of as general, broadly appealing, or *top of the funnel* offers. As each lead demonstrates a higher degree of sales readiness and qualification, they will move to further stages.

Marketing Qualified Lead

Marketing Qualified Leads, commonly known as *MQLs* are those people who have raised their hands (metaphorically speaking) and identified themselves as more deeply engaged, sales-ready contacts than your usual leads, but who have not yet become fully fledged opportunities. Ideally, you should only allow certain, designated forms to trigger the promotion of a lead to the MQL stage, specifically those that gate *bottom of the funnel* offers like demo requests, buying guides, and other sales-ready calls to action.

What qualifies someone to be in each lifecycle stage **for your business?**



Pick your segments.

- 1 Lifecycle-based segments
- 2 Persona-based segments
- 3 Activity-based segments



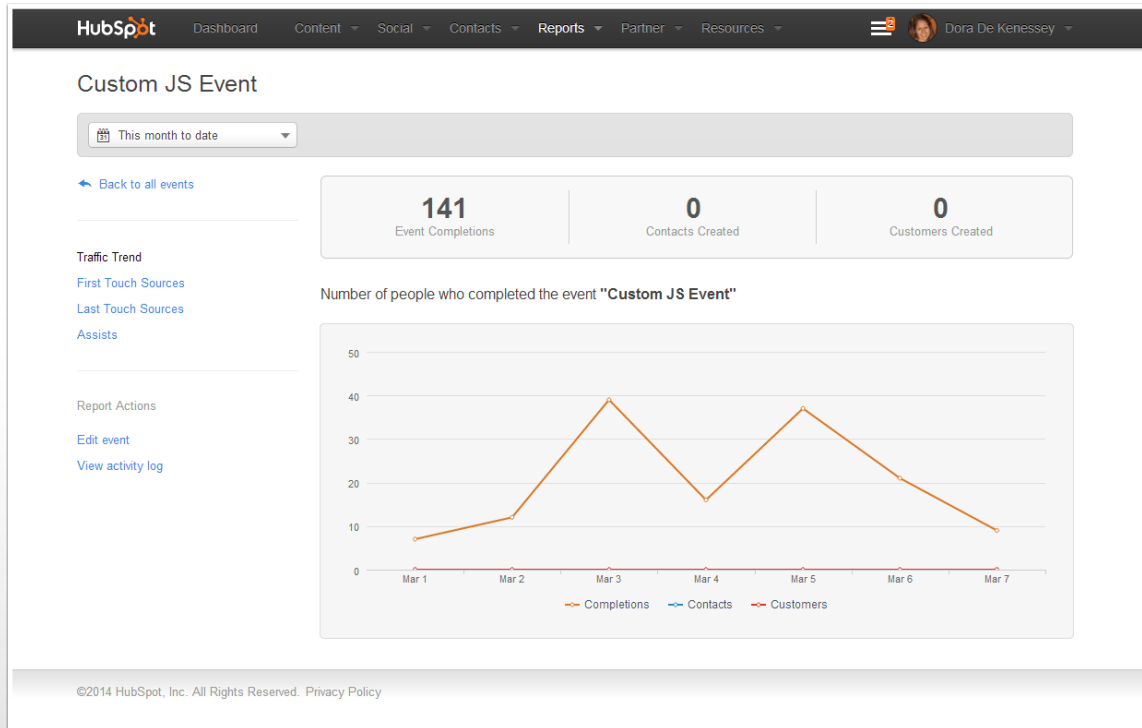
Focus on your **highest-value persona(s)**.

Pick 2-3 measurable qualities for each.



Pick your segments.

- 1 Lifecycle-based segments
- 2 Persona-based segments
- 3 Activity-based segments



Examine the **past online behavior** of your users to determine the segments that you create.

This uses the Events tool and is for Enterprise level accounts only.



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Lists » New List

What's the name of this list?

What type of list do you want?

-  **Smart list** – add contacts continuously according to rules you set
-  **Static list** – add contacts manually

Which contacts should be in this list?

Include contacts who meet all of these requirements:

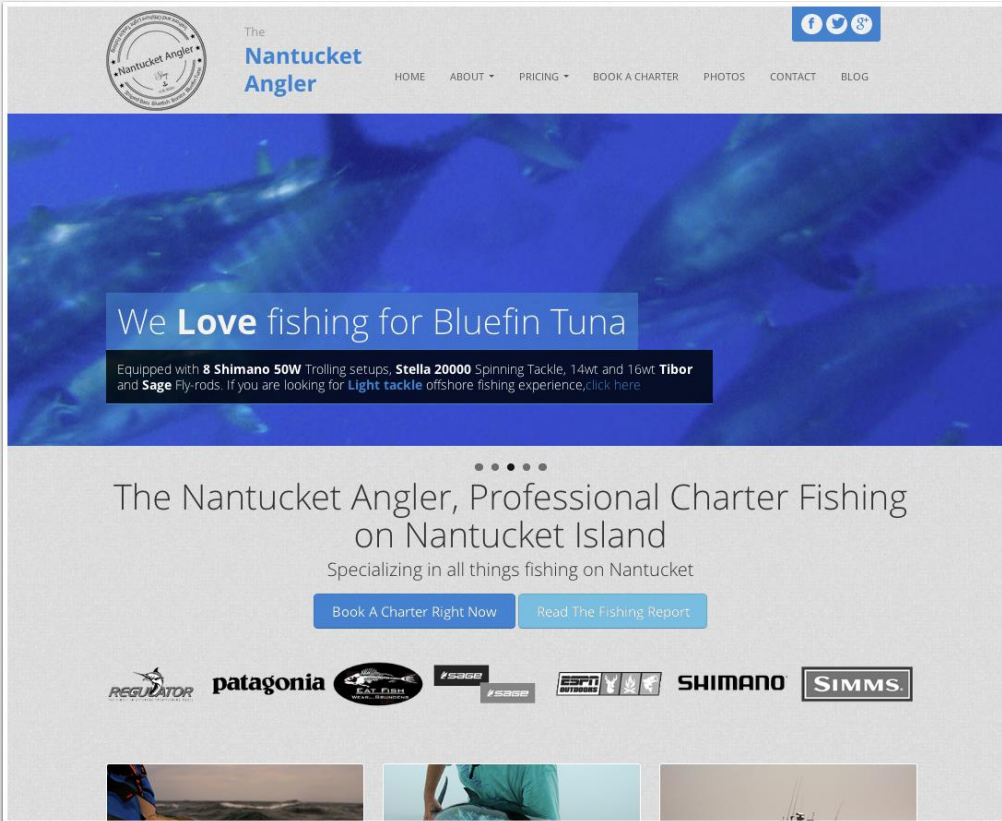


to add contacts to this list who meet a different set of requirements

Create your segments by setting up **Smart Lists**.

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Use **Smart Text** and **Smart Calls-to-Action** on site pages

Map your site pages to the Buyer's Journey to figure out which smart content will be most relevant.

Use Smart Form Fields on landing pages

When a contact revisits a form, Smart Form Fields replace old fields with new ones.

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Job Title *

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Number of Employees *
- Please Select -

Industry *
- Please Select -

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Schedule my demo!

The UrbanBound Blog

[REQUEST A DEMO](#) | [LOGIN](#)

4 Things You Missed in Tech Last Week

Posted by [Aria Solar](#) on Feb 18, 2014 11:43:59 AM



We're back to give you a wrap up of last week's biggest tech news. Between working, the Olympics, and battling this treacherous weather (for all my fellow Chicagoans that is, at least), it can be tough to keep up to date with all that is happening in the tech world. Don't worry - we've got you covered!

1.) Kickstarter got hacked

Last week, crowdfunding site Kickstarter was hacked. According to CEO Yancey Strickler, **no credit card information was stolen**; however, hackers did manage to access email addresses, passwords, phone numbers, and information alike. Only two accounts were compromised but everyone was advised to change their passwords.

Kickstarter remedied the situation by thoroughly investigating the hack and informing customers as soon as they had a clear outline of what happened. They also promised to improve security measures from here on out.

Could have been worse, but it also could have been better.

2.) Square rolls out a new feature

With Square's latest rollout, users are now able to request money, known as **Square Cash** from others through the app or email.

Why is this helpful? The new feature also allows users to request payment through email. Those requesting funds simply carbon copy ("CC") request@square.com and the amount to be requested. IfC



Subscribe to the UrbanBound Blog

Email *

Notification Frequency *

- Instant
- Daily
- Weekly
- Monthly

Subscribe



Use **Smart Calls-to-Action** on blogs.

Show users a brand new call-to-action when they return to your blog.

42%

higher submission rate for
Smart Calls-to-Action.

(Source: HubSpot)

Don't use smart content in Emails!

Your emails are already segmented and targeted, so no need for smart content.

Use personalization tokens instead.



Your image here

w: 600px h: 100px

This is a rich text column

Say something fun and important, maybe add an image or two.

Hi there,

Describe what you have to offer the customer. Why should they read? What did you promise them in the subject line? Tell them something cool. Make them laugh. Make them cry. Well, maybe don't do that...



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In order to host smart text, the template for that page must include a **rich text module**.

The screenshot displays a page editor interface with the following components:

- Top Bar:** Contains buttons for 'Create', 'Actions', 'Edit', and 'Preview'. On the right, there are links for 'Tutorial' and a 'Related' dropdown menu.
- Configuration Row:** Includes buttons for 'Configure Head', 'Configure Body', 'Group Modules', 'Undo', and 'Redo'.
- Module List:** A vertical stack of modules, each with an icon, a title, a subtitle, and a settings gear icon:
 - Logo:** Represented by a globe icon.
 - Section Header:** Represented by 'Aa' icon.
 - Rich Text:** Represented by a pencil icon. This module is highlighted with an orange border.
 - Right Column:** Represented by a pencil icon. The 'Rich Text' label within this module is also highlighted with an orange border.
 - Social Sharing:** Represented by a speech bubble icon.
 - Page Footer:** Represented by a pencil icon.
- Bottom:** A button labeled 'Add row'.

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What are **personalization tokens**?

Personalization tokens insert small bits of information pulled from a user's Contact record.

Personalization tokens are **friendly**.
Smart content is **helpful**.



Meghan, here is your Marketing Content Audit Template

Inbox x



John Staples john.staples@salesbenchmarkindex.com [via](#) hubspot.com

to me ▾

Hi Meghan,

Here is the [Marketing Content Audit Template](#) you requested. If you need help, my mobile number is [303.330.3250](tel:303.330.3250) and email address is john.staples@salesbenchmarkindex.com. I am here to help you so don't be bashful.

Readers of this almost always [read this](#). Go ahead and give it a read for I think you will find it relevant. If you want the tool in it, I enabled one-click for you so you don't need to fill out another pesky form.

Thanks for reading the Sales Benchmark Index blog.

Cheers!

John Staples

Sales Benchmark Index

Principal

[303.330.3250](tel:303.330.3250)

[Connect with me on LinkedIn](#)

In order to host personalization tokens, the template for that page must include a **rich text module**.

The image shows a user interface for editing a page template. At the top, there are buttons for 'Create', 'Actions', 'Edit', and 'Preview'. On the right, there are links for 'Tutorial' and 'Related'. Below these are buttons for 'Configure Head', 'Configure Body', 'Group Modules', 'Undo', and 'Redo'. The main area displays a list of modules: 'Logo', 'Section Header', 'Rich Text', 'Right Column', 'Social Sharing', and 'Page Footer'. Each module has a settings gear icon. The 'Rich Text' module is highlighted with an orange border, and its 'Rich Text' label is also highlighted with an orange circle. At the bottom, there is an 'Add row' button.

Left Column Make Smart

Edit Insert View Style Table Tools

← → </> ABC | Formats | **B** *I* A A |

👤

🔍 first

- First Conversion
- First Conversion Date
- First email click date
- First email open date
- First email send date
- First Name

Hello FIRSTNAME

The headline and subheader tells us what you're [offering](#), and the form header closes the deal. Over here you can explain why your offer is so great it's worth filling out a form for.

Pick **one contact property** from your Contacts tool to pull from.

Set the **default value** for the contact property.

If your user is a first-time visitor, don't let the page say "We can help COMPANYNAME"! Add in a default value that will work with your content.

Default Values for Page Personalization [Manage Properties](#)

Contact Properties

Company Name

Default Value

[Save Changes](#)

Account Properties

Select a property to set its default...

Default Value



Hey **Dee Dee**, can't wait to see you at Toastmasters on Thursday!

You know why? Because we don't see each other enough. It's not like the old days when we used to hang out in the Shark Tank every day drinking seltzer, eating red velvet cupcakes and talking about our favorite bloggers. We always say we're gonna hang out, but we never make any plans. Well, enough of this nonsense, I'm making plans!



This Thursday, March 6 meet me at 6pm in Benioff!

THANKS FOR REQUESTING A DEMO!



We will be in touch in 3-5 business days to schedule an appointment with you.

BIGLytics has proven time after time that our big data software performs well for **telecommunications** companies across the nation. We're sure that you won't be disappointed! And don't take our word for it - check out our case studies page.

[Read ALL our case studies!](#)

Use personalization tokens in
emails and **thank you pages**.

Most users will be surprised to see their contact information pop up on your website. But in these two places, users will be expecting you to remember information about them.

Personalize your **emails.**

According to Experian, emails with personalized subject lines have a 26% higher open rate.



Hey **Dee Dee.** can't wait to see you at Toastmasters on Thursday!

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Personalize your **thank you pages.**

Thank the user for getting your offer, and provide some additional direction based on the information they've just given.

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SMART CONTENT + PERSONALIZATION TOKEN BEST PRACTICES

- ✔ Promote a good user experience.
- ✔ Start small.
- ✔ Pick default content with value for a first-time visitor.
- ✔ Create smart content + personalization tokens that carry weight.
- ✔ Use smart content only after a user has consciously provided their information.
- ✔ Don't be creepy!
- ✔ Test, test, test.

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