INTERMEDIATE

HOW TO

CONVERT LEADS INTO CUSTOMERS USING HUBSPOT.

Learn How to Easily Convert Leads Into Valuable Customers with the HubSpot All-in-One Marketing Software

A publication of
HubSpot

IS THIS BOOK RIGHT FOR ME?

Not quite sure if this ebook is right for you? See the below description to determine if your level matches the content you are about to read.

INTRODUCTORY

Introductory content is for marketers who are new to the subject. This content typically includes step-by-step instructions on how to get started with this aspect of inbound marketing and learn its fundamentals. After reading it, you will be able to execute basic marketing tactics related to the topic.

INTERMEDIATE THIS OFFER

Intermediate content is for marketers who are familiar with the subject but have only basic experience in executing strategies and tactics on the topic. This content typically covers the fundamentals and moves on to reveal more complex functions and examples. After reading it, you will feel comfortable leading projects with this aspect of inbound marketing.

ADVANCED

Advanced content is for marketers who are, or want to be, experts on the subject. In it, we walk you through advanced features of this aspect of inbound marketing and help you develop complete mastery of the subject. After reading it, you will feel ready not only to execute strategies and tactics, but also to teach others how to be successful.

FOR THE LOVE OF MARKETING.

HUBSPOT'S ALL-IN-ONE MARKETING SOFTWARE.

... brings your whole marketing world together in one, powerful, integrated system.

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Video Overview

MARKETING ANALYTICS

Analyze your web traffic and see which sources are generating the most leads.

SEARCH OPTIMIZATION

Improve your rank in search engines by finding and tracking your most effective keywords.

BLOGGING

Create blog content quickly while getting SEO tips and best practice pointers as you type.

LEAD MANAGEMENT

Track leads with a complete timeline-view of their interactions with your company

EMAIL

Send personalized, segmented emails based on any information in your contact database.

SOCIAL MEDIA

Publish content to your social accounts, then nurture leads based on their social engagement.

HOW TO CONVERT LEADS INTO CUSTOMERS USING HUBSPOT.

Written By Jeffrey Russo

Jeffrey Russo is a Product Marketing Manager at HubSpot, serving as an expert on marketing automation, Salesforce integration, and HubSpot's marketing database application, Contacts.

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Designed By Desmond Wong

Desmond is currently a creative designer and inbound marketer at HubSpot. He has worked with a variety of start ups, medium, and large sized companies over the years with a focus in branding and business development.

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CONTENTS.

Introduction.

Knowing when to pursue a specific lead in many organizations comes down to spending a huge amount of time checking in on leads, emailing, calling, and having a sense of intuition around when a particular lead deserves attention. Sales reps are expected to turn leads into customers by being in tune with their database or territory. To some extent, this approach works - but it is hugely inefficient, and it's becoming less and less effective in a world where potential buyers do most of their research online before ever engaging a salesperson.

With the rise of inbound marketing, it's now easier for you to catch more leads earlier in the buying process than ever before. While having leads in your database that you wouldn't have otherwise engaged is a huge net positive, the additional volume can pose a new challenge for your sales team. More leads means more work, especially if they come from new sources. If your sales team is already busy checking in, following up, and doing work to keep your brand front of mind for their universe of leads, the additional volume generated by inbound marketing leads – a channel they don't necessarily understand, and have to work to learn - might pose a significant challenge.

Luckily, many forward-thinking organizations are shifting how they manage their lead pipelines. They are leading the way into a whole new world of lead engagement - where the marketing team manages leads longer, using automation to keep them engaged. This new sales-marketing collaboration means that marketing nurtures leads longer, and uses analytics to know when they are ready to go to your sales team. At HubSpot, we call this middle-of-the-funnel marketing.

The lion's share of work required to turn leads into customers takes place at this middle funnel stage. When you undertake a middle of the funnel marketing strategy, you'll be taking a different approach to many of the things you probably already do to generate new leads. Rather than generating content that aims at enticing visitors to become leads, you'll be looking for ways to deepen engagement with your existing leads, with the ultimate goal of getting them to "raise their hand" to demonstrate that they are interested in what you sell. This ebook will teach you how to do just that.

Knowledge Check.

Middle-of-the-funnel marketing is the process of marketing to your existing leads, keeping your company front of mind and "listening" for signals that they may be ready to buy, and it's a key part of the inbound marketing process.

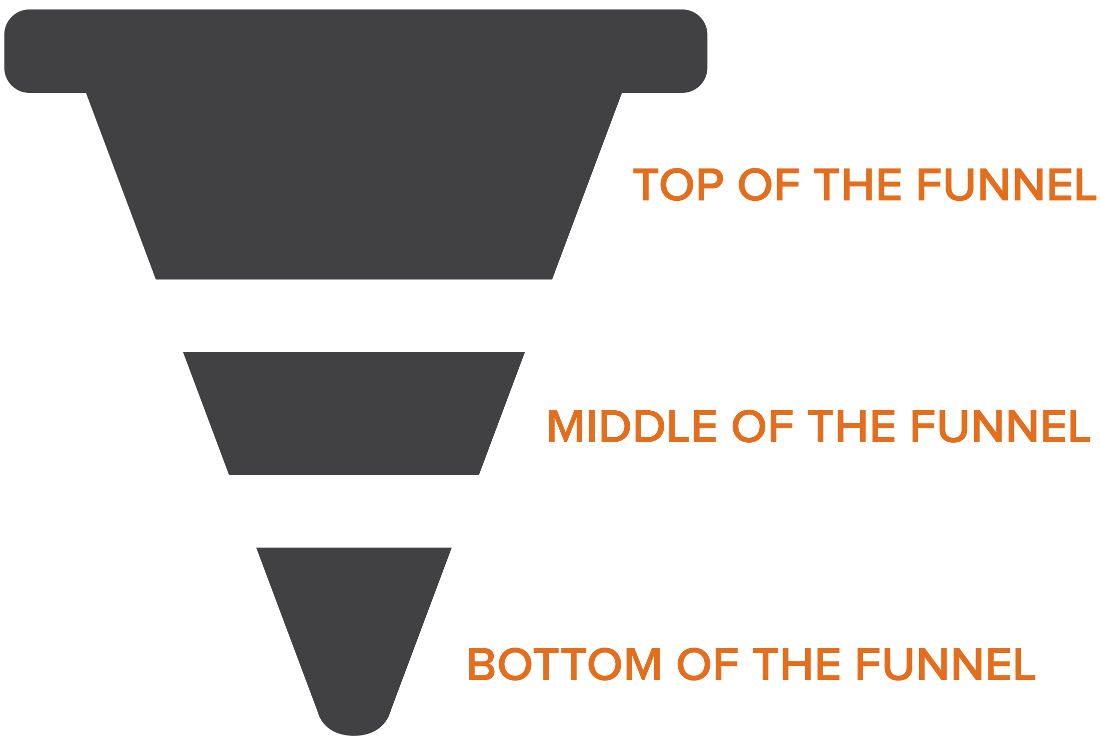
01

CHAPTER

THE MARKETING FUNNEL 101.

The Marketing Funnel 101.

Before we get into the details of converting leads into customers, let's first take a look at an example of a typical marketing funnel. If you haven't seen a visualization like this, it's a common way of explaining how early stage visitors to your website progress to becoming leads, and eventually customers.



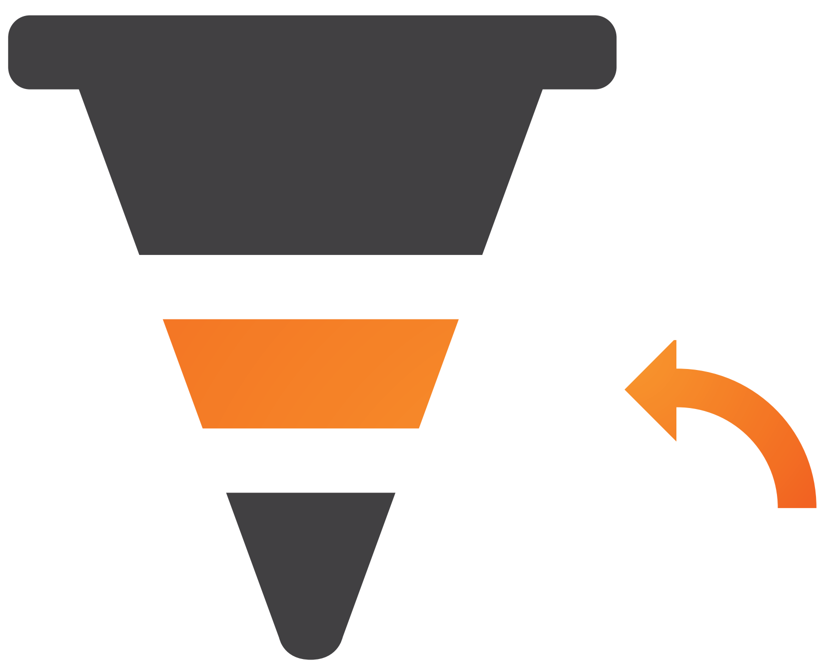
Top of the Funnel.

Above the funnel are strangers - the unknown, anonymous visitors to your website. They haven't yet completed a landing page or a form, so you don't know who they are, but they represent potential leads. As a marketer, there are a variety of tactics you can work with to get more of these visitors to the "top of the funnel" - blogging, engaging in social media optimizing your website so it gets found by search engines and their users, and potentially more traditional tactics like paid search or other forms of advertising.

Middle of the Funnel.

Middle-of-the-funnel marketing refers to marketing to existing leads in your database who aren't yet ready to buy. If you have a long sales cycle, you likely have a large number of leads in the middle of your funnel at any given point in time. Drawing potential leads through the middle of your funnel means creating opportunities for them to "convert" using landing pages and forms. You might entice them with ebooks, whitepapers, webinars, or other types of content they might be interested in.

In this ebook, we'll be focusing on using HubSpot to market to leads who are in the middle of your funnel. We'll cover some common examples of those types of offers in a minute.



Bottom of the Funnel.

At the bottom of the funnel, your sales team gets involved. Leads who have demonstrated interest in purchasing your product or service and are in an active consideration state are said to be at the bottom of the funnel. HubSpot has tools that can help both marketers and sales reps at the bottom of the funnel, some of which we'll cover here.

02

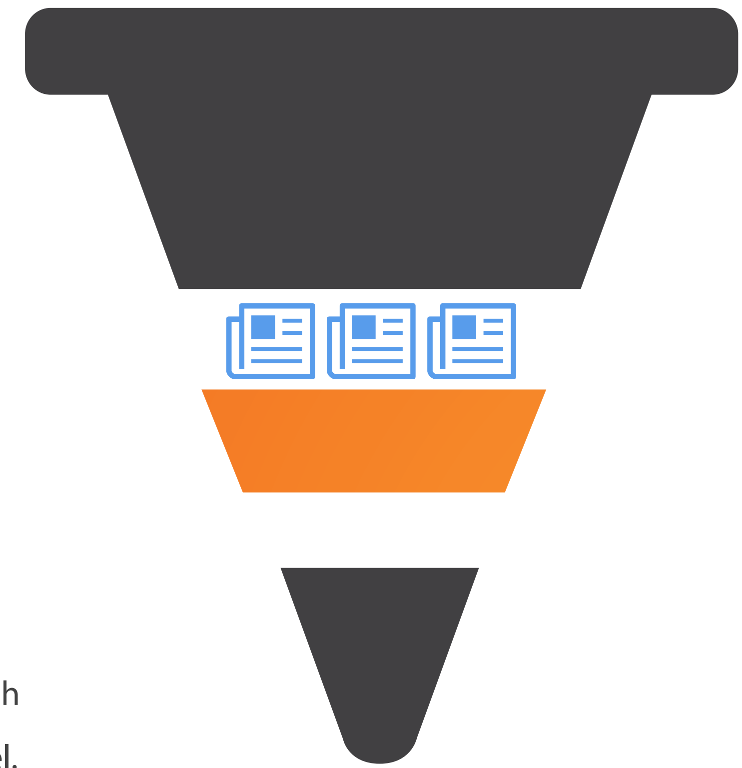
CHAPTER

CHOOSING THE RIGHT CONTENT.

Choosing Your Offer Content.

While it's enticing to want to immediately convert your website visitors into leads, think about your funnel as a step-by-step process. Ultimately, to turn leads into customers, you need "micro-conversions' which transition your prospects through your funnel one step at a time – from visitors to leads and from leads to customers.

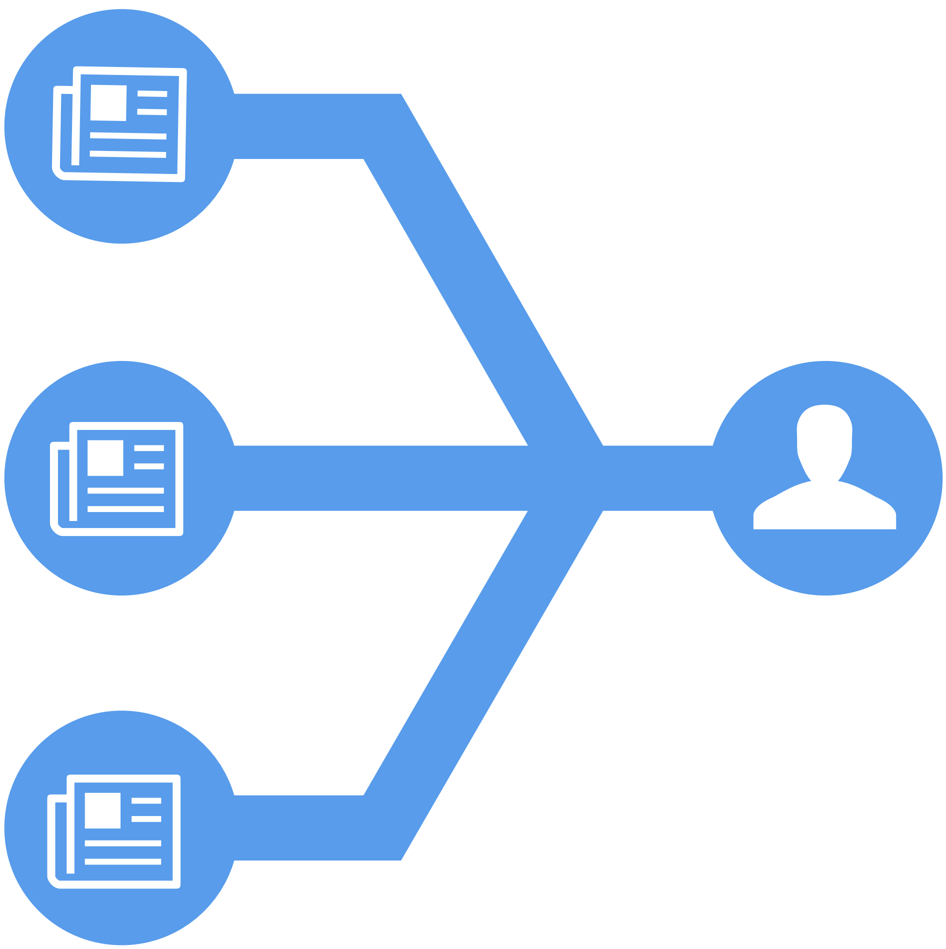
To accomplish this, you will need to develop a variety of lead nurturing content. People in different buying stages have different questions, which should be addressed in different ways.



Here are some key considerations when developing content for the middle of your funnel, and the different conversion opportunities you might use to draw leads through the middle of your marketing funnel.

What if I don't have a steady stream of new leads?

This ebook focuses on turning existing leads into customers through middle-of-funnel marketing. Without a steady stream of new leads coming in, all the emailing, marketing automation, and budget in the world won't help you generate new leads and customers from a stale database. If this is the situation your company is in, don't fret - the tactics described here are still important, but be sure to learn more about how inbound marketing can help you improve all of the stages of your marketing funnel, from top to bottom.



Two Primary Goals of Middle-of-the-Funnel Marketing

When choosing content to offer to your existing leads, it's important to consider the two primary goals of middle-of-funnel marketing.

1 Building a Relationship with Your Leads

The first goal is building a relationship and keeping your brand front of mind for your leads, regardless of whether or not they are ready to buy. This is best accomplished by sharing interesting, relevant content about your industry or space with your leads. It might come in the form of occasionally sharing a blog post, important industry news, or another piece of content that anyone who works in your industry would find interesting and useful.

2 Develop a Deeper Interest In Your Brand

The second goal is getting your leads to "raise their hand" and signal a deeper interest in your product. For example, by filling out a lead generation or contact sales form. Measure your leads interest by developing deeper-level content. Use you content to take your leads' temperature – do you have offers that, when downloaded by your leads, clearly signals that the lead has a deeper interest in your product, or might be researching a potential purchase?

For example, if someone downloads a buyer's guide, or a product spec sheet, you might reasonably infer that they are getting ready to make a purchase. When someone downloads one of these higher value pieces of content, you'll know that they are a worthy candidate for your sales team to follow up with – and want to pass them along pretty quickly.

In essence, you're trying to move your leads from the top of the funnel to the middle of the funnel, in order to get them closer to a sales conversation.

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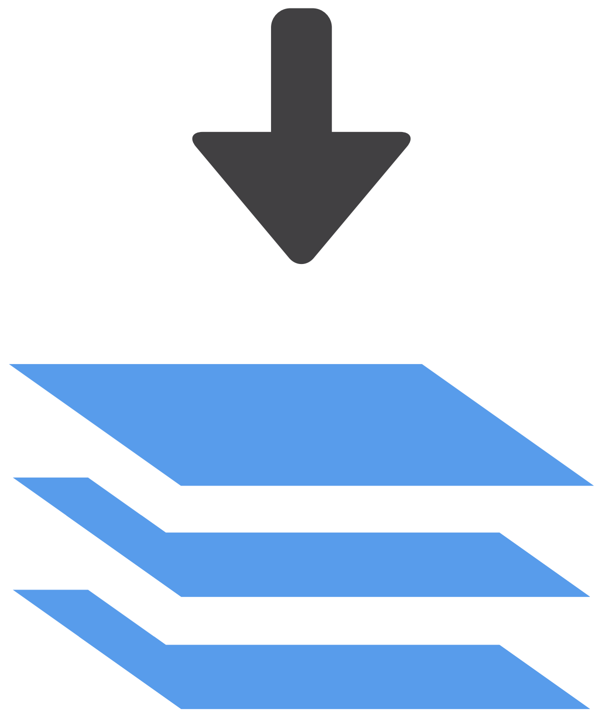
CHAPTER

NURTURING LEADS USING HUBSPOT SOFTWARE.

Nurturing Leads Using the HubSpot Software.

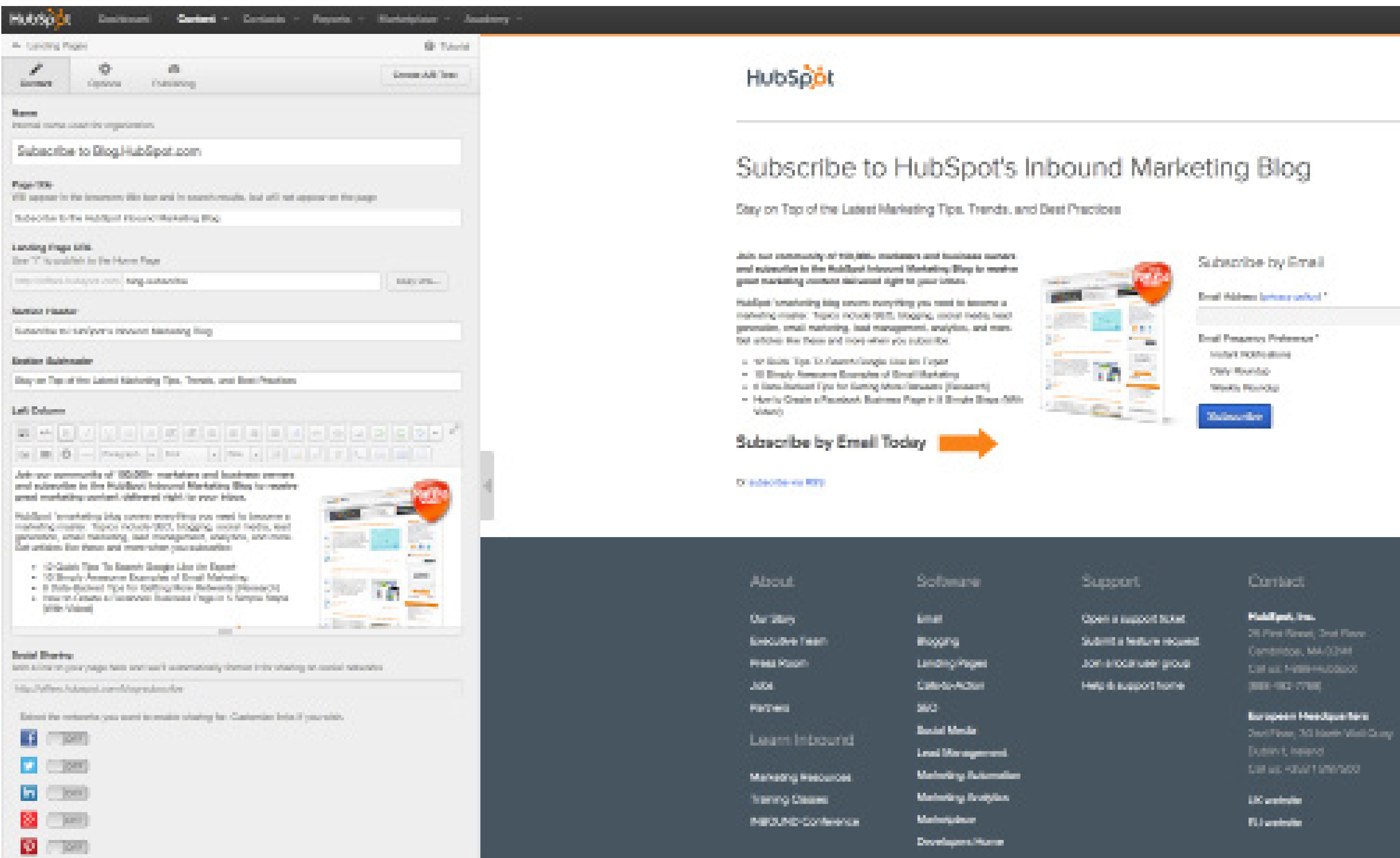
Now that we've looked at what types of content you can use to market to your existing leads, let's take a look at how all of these pieces fit together in HubSpot. We'll walk through each of the necessary components of a middle-funnel marketing campaign, and see how all of these pieces work together to help you drive leads closer to being ready for your sales team and closer to becoming customers.



Create Conversion Opportunities with Landing Pages.

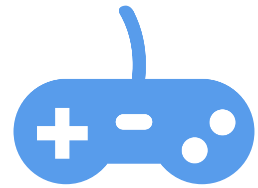
At the very center of middle-of-funnel marketing is the landing page. Regardless of how your leads get there (we'll cover that in a minute), your landing pages needs to convey the value of your content offer in order to succeed at enticing your leads. Landing pages typically include some short, concise copy that explains the value proposition of your piece of content, and a form that the contact uses to convert.

In HubSpot, building a landing page is easy. HubSpot comes with dozens of clean, beautiful landing page templates right out of the box. You can also easily build your own with our template builder tool, or have a designer or developer build one from scratch, or import an existing design.



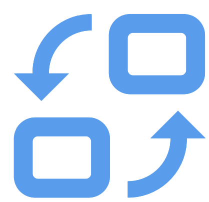
If you are considering a landing page tool, here are some important features to look for:

- Is the landing page tool flexible? Can someone with no technical knowledge create a new page quickly, from scratch? Can they control the design?



- Does the landing page tool adapt to who is viewing it? How do you know if your tool is adaptable? If you know the lead who arrives on the landing page fits a specific persona, or is interested in a specific aspect of your product, can the landing page adapt to show more relevant images to that lead?

- Is the landing page tool fully integrated with the rest of your marketing and sales systems? Can you quickly add forms, and do the leads from those forms go into your marketing database? Do your landing pages employ cookies to give you behavioral data on the leads that convert on them?



These are just a few of the many things you should think about when considering a platform for your landing pages. You can learn more about HubSpot's approach to landing pages here.

Progressive Profiling 101.

When you are marketing to leads who are already in your system, are you asking them the same questions you already know about them? Or are you gaining additional, valuable details about your leads for your sales team? HubSpot forms use progressive profiling technology - a feature that allows you to gain more insight into your leads each time they fill out a form by asking the right questions at the right time.

How does it work? When you build a form in HubSpot, you'll have the option to turn on progressive profiling for each field you include. If you turn it on, HubSpot software automatically identifies any questions on your form that the lead has already answered and shows your leads a different question in their place. That way, you learn more about your leads each time they fill out a form, instead of annoying them with the same questions they've answered before. You can even control the order of when different questions are asked. Start by asking for the most vital details from your leads, and work your way down to more interesting questions that are helpful to sales as leads become more comfortable with your brand.

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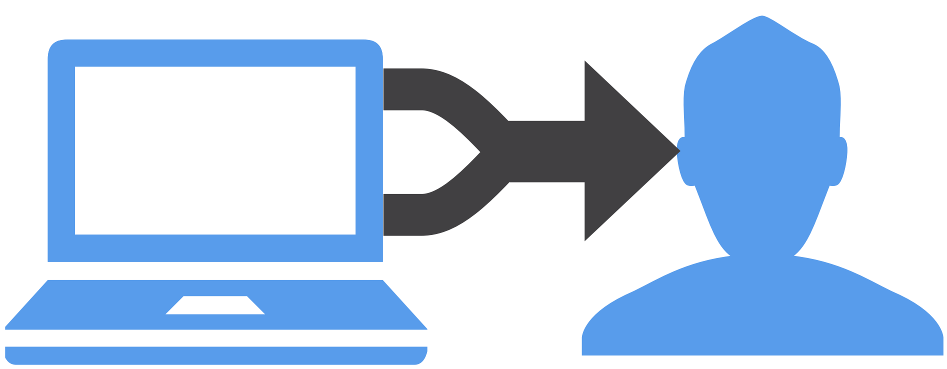
CHAPTER

CONVERTING WEBSITE VISITORS WITH SMART CTAS.

Converting Website Visitors with Smart CTAs.

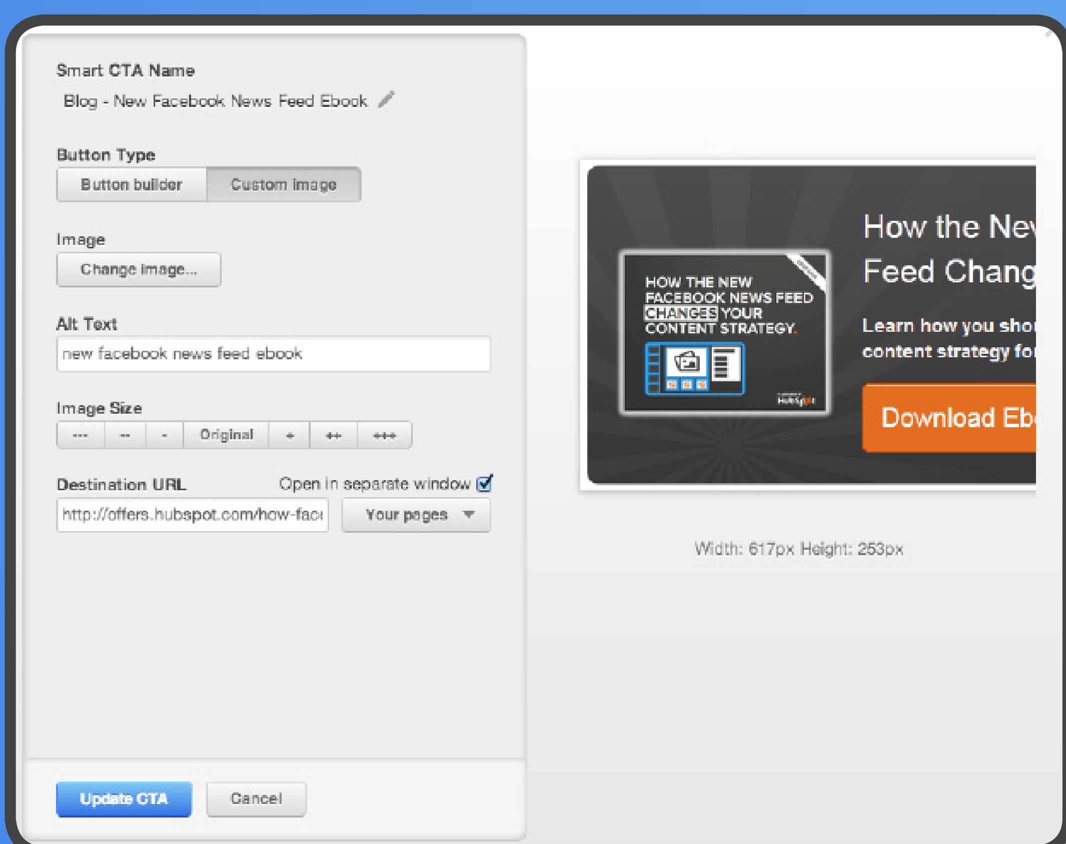
Once you create a landing page, you must address the next natural question towards converting leads to customers - how do we actually get our leads to our landing page?

First, consider the fact that your existing contacts who represent the warmest leads and opportunities are likely visiting your website to research your products on their own time, when they know they are nearing making a purchase decision. They definitely aren't waiting for your emails or a call from your sales rep.



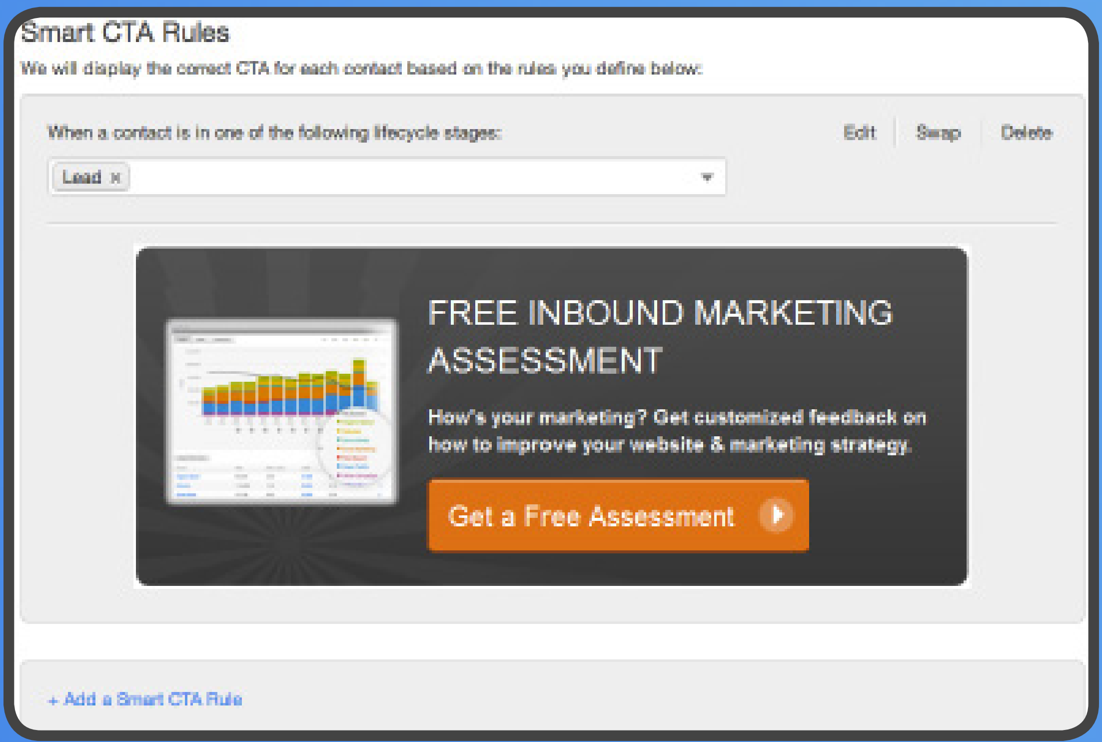
So how do you match the warm leads who are likely already visiting your website with the landing pages you've built to convert them? And how do you do this in such a way that you aren't showing those offers to top of funnel visitors who aren't as likely to convert on them? This is where Smart CTAs come into play.

In HubSpot, we link to landing pages using calls-to-action - high visibility buttons that we can build, A/B test, and use to target specific segments of leads right from inside of HubSpot. Creating new calls-to-action, something that used to require a designer, is a simple, intuitive process. If you can copy and paste a snippet of code, you can install calls-to-action anywhere on your website, or on any HubSpot page with just the press of a button.



Calls-to-action are a helpful tool to bridge the right visitors from your website to your landing pages. But in this example, we are building out marketing that appeals to existing leads who we want to push to the next step. Wouldn't it be great if our calls-to-action could adapt to the visitor, routing specific calls-to-action to new website visitors that are most likely to appeal to them? And routing highly customized, specific calls-to-action to existing leads encouraging them to take the next step?

Through the magic of dynamic content, we can easily place a single call-to-action module in multiple places on our website, then target which groups of visitors see which calls-to-action in those places. This allows me to target messages all over my website - even on old, deep pages that still get traffic but don't often get updated - to ensure that every visitor sees the best possible calls-to-action wherever they go on your website.



05

CHAPTER

KEEP IN TOUCH WITH YOUR LEADS VIA WORKFLOWS & LEAD NURTURING.

Keeping In Touch With Your Leads via Workflows & Lead Nurturing.

Calls-to-action help us target and convert leads who end up on any page of our website, regardless of how they got there. But what about keeping in touch with leads in our database over a long period of time, when they aren't necessarily coming back to our website themselves? Or when we've identified a warm lead and want to continue to push them further along through our funnel? This is where Workflows come in.

The Workflows tool is HubSpot's approach to marketing automation. You can use Workflows to automate many common marketing tasks, including the sharing of content that your sales team (or your team) currently curates manually. Because it's easy to set up multiple concurrent workflows, you can send a highly targeted mix of content to your existing leads, taking into account their interests, and where they are in the buying cycle. That way, your leads get a perfect combination of offers and content from you that they are likely to stay engaged with over the long term.

Beyond automating triggered emails, Workflows can help automate other marketing activities. For example, you can use the Workflows tool to add individual leads to lists for follow up when they take certain actions or meet certain thresholds, or send a notification to the sales rep owner when a lead takes a certain action.

06

CHAPTER

ACTIVELY TRACK YOUR LEADS.

Actively Track Your Leads.

In addition to the opportunities you actively present to your leads to "raise their hand" - the offers, landing pages, emails, and other types of content - there are likely other important actions leads take on your website that you may want to track.

When a lead visits a certain page (your pricing page, for example), that action could signal that the lead is more qualified, or even worthy of immediate follow-up from a sales representative.

If a lead visits a lot of pages on your website, that may be an indicator of new interest too.

Employ Lead Scoring.

How do you aggregate all of the many "signals" you might be tracking into an easily digestible format for your sales reps? One of the best ways to accomplish this kind of tracking is using lead scoring.

Lead scoring is the practice of assigning points to your leads based on their characteristics and activities. That score is then used by marketers and sales reps to rank leads based on their level of qualification, and for both sales and marketing to determine what action should be taken for an individual lead. In HubSpot, you can set your lead scoring criteria to take virtually any kind of interaction into account - you can add points when a lead visits a certain page on your website, clicks a certain object or link on your website, fills out a specific form, and other interactions too.

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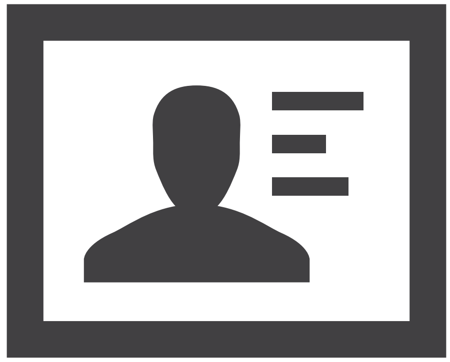
CHAPTER

SERVE YOUR LEAD INTELLIGENCE TO YOUR SALES TEAM.

Serve Your Lead Intelligence To Your Sales Team.

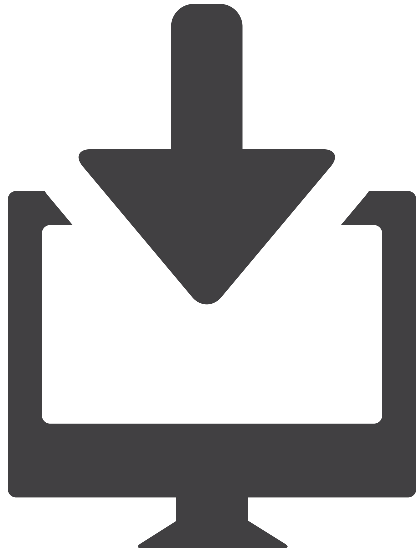
As you are marketing to these "middle-of-funnel" leads over time, you are likely collecting a lot of valuable information on them through the forms they fill out, the pages they view, and other details. But as important as collecting rich, useful data on your leads for your sales team is having an effective way to present the leads and the most important details on your leads to your sales reps.



Using a Contacts Database.

In HubSpot, every lead stored in the system gets what we call a contact record -- a rich profile that aggregates everything we know about the lead in one place. Every one of your lead's historical interactions with your brand are shown in chronological order on what we call the timeline. The timeline makes it easy for a sales rep to research the history of a lead, to understand their journey and their most recent interests or points of engagement with your brand.

When sharing lead intelligence with your sales team, you want to build as much transparency as possible into the process. HubSpot has a specific "sales rep" user role that allows them to view a lead's activity if you choose to give them access. Sales reps can access this view for any lead either by logging into HubSpot or by clicking through to a specific lead from an integrated CRM system.



Syncing to your CRM system.

When a lead is finally ready to be reviewed by your sales team, you'll want an easy and streamlined hand-off between marketing and sales. If your organization uses a CRM system, the transfer process may be as simple as pushing the lead from your marketing system to your CRM system – just make sure to include all of the lead intelligence you've collected along the way. In HubSpot, it's easy to set up rules that control when a lead gets pushed to your CRM system.

You can choose to make your sales hand-off thresholds as simple or as complex as you'd like. Many companies determine their sales-marketing lead responsibilities based on an aggregate metric such as lead score, while other identify one or more key actions, such as a lead downloading a pricing sheet, to control when they are channeled into your CRM system.

Notifying Your Sales Reps When their Leads Take Important Action.

Even after a lead has been handed off to your sales team, there are still things marketers do to increase the likelihood that your sales team will successfully close the lead.

For example, you may want to notify the lead owner whenever a lead takes a key action, like visiting your pricing page (which is often a key indicator of sales-readiness), or downloading a product-centric piece of content.

With HubSpot's Workflows tool, that's easy to do. You can easily set criteria used to notify the lead owner, or any individual in your organization, when a lead takes a key action. The notification email can also be customized from the ground up to look exactly how you want it, and to include any details about the lead stored in your database.

Conclusion.

For a lot of organizations, middle-of-the-funnel marketing is likely a new idea, and a big shift in the way they do things. While taking those first steps toward doing middle-of-the-funnel marketing might seem like a big task, don't underestimate the power this approach can have to transform your business.

As a marketer, middle-of-the-funnel marketing presents a huge opportunity. You'll be having a bigger impact on your company's bottom line, by generating and pushing more leads deeper into the sales process, and at the end of the day, helping to generate more business. Middle-of-the-funnel marketing presents a huge opportunity for your sales team, too – they can stop spending their time on mundane tasks and focus their valuable skills on working with a larger number of warmer leads that come out of your efforts. It's a true win win situation.

LEARN HOW TO EASILY CONVERT YOUR LEADS WITH HUBSPOT.

Talk to a HubSpot specialist to learn how you can easily target your emails to the right people, at the right time. Click here to contact an inbound marketing specialist today.

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