GOING BEYOND EMAIL:

HOW TO MASTER MARKETING AUTOMATION

The Advanced Guide to Optimizing Your Marketing Funnel with Lead Nurturing

A publication of HubSpot

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HOW TO USE WORKFLOWS FOR BETTER LEAD NURTURING

By Sarah Goliger

Sarah Goliger is an Inbound Marketing Manager at HubSpot, responsible for lead generation, email marketing, and lead management for the mid-sized business segment.

Previously, Sarah managed HubSpot's external content and worked on various optimization projects as part of the SEO team. Before that, Sarah was on HubSpot's content creation team, where she wrote for HubSpot's Inbound Marketing blog, created educational ebooks, and managed the company's landing page creation. Sarah has also been involved in organizing HubSpot's co-marketing efforts and running paid search campaigns.

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CONTENTS

"If you're not managing leads properly, you're wasting your time, marketing resources, and money."

As a marketer, your most valuable asset is your marketing database. But your database is only as powerful as you make it. You've put a lot of work into attracting leads. However, research from Gleanster suggests that, even when it comes to qualified leads, more than 50% of leads aren't ready to buy on the day they first convert on your site. If you call up these leads and push them into making a decision right away, you will likely lose them.

But these are valuable leads, and just because they're not ready to purchase now, doesn't mean they will never be ready. If you're not managing these leads properly, you're wasting your time, marketing resources, and money.

So, how do you help these leads become sales-ready? That's where lead nurturing comes in. Lead nurturing is a system that allows you to send an automated series of emails to an early-stage lead in order to pre-qualify them before handing them over to your sales team.

In other words, it's a way for you to follow up with your leads – to keep them engaged with educational and informative content that will help them learn more about your product, company, or industry. As they learn more and become ready to consider your product or service, you can qualify them and send them over to sales.

But this ebook is about going beyond lead nurturing. Let me introduce you to the next level of lead nurturing, a better way to manage your leads, and one of the most powerful tools available to marketers today: workflows.

In this ebook, we'll talk about what workflows are, why you should use them, when is the right time to start using workflows, what components make up a workflow, and recommendations for making your workflows effective. By the time we're done, you'll be ready to create and implement your own workflows to help you convert more of your leads to customers.

Ready to get this 'flow going?

CHAPTER 1

WHAT ARE WORKFLOWS & WHEN SHOULD YOU START THEM

"A workflow is a series of automated actions that you can trigger to occur based on a person's behaviors or contact information."

A workflow is a series of automated actions that you can trigger to occur based on a person's behaviors or contact information. Workflows go way beyond simple marketing automation, though. With workflows, you can send emails, update contact information, add or remove contacts from lists, and trigger email notifications.

So let's say an existing lead downloads a piece of content from your site and now you want to send this lead to your CRM system because it's sales-ready. Based on what you know about the lead's history, you want to increase their score because now they're more qualified. You can move them from a lead to an opportunity stage and you can deliver a personalized call-to-action.

Save Time with Automation

Our goal here is to waste less time, define the rules that we want, and be able to automate it. Workflows makes that possible, and – better yet – workflows makes that easy.

With workflows, you can trigger actions based on any information you have about your leads, allowing you to send the right message to the right person at the right time. For instance, you can send a series of emails to:

- Leads who have viewed a certain page on your website
- Leads from companies with more than XYZ employees
- Leads from companies in XYZ industry or XYZ location
- Leads with a specific website history like page views, clicks, downloads, etc.

How Workflows Help You Convert More Leads into Customers

Workflows give you the opportunity to do extremely powerful segmentation. Being able to group your leads based on different properties and behaviors means that you can very closely target your emails and your nurturing process to their specific interests and needs.

Gone are the days of sending one big email to all of your leads and hoping it's relevant enough for some of them to click through or engage with it. It's time to start using smarter tools to send your leads what they're looking for and make them sales-ready faster.

According to a report released by Lenskold Group and The Pedowitz Group, 60% of survey respondents who use marketing automation say it has increased the quality of the leads that get passed to sales. Market2Lead also found that leads that go through automated workflows have a 23% shorter sales cycle. Imagine what your sales team could do with 23% more time.

Customize The Timing of Your Workflows

Speaking of time, workflows also let you set custom timing for your campaigns, so you can decide when each email or action should be triggered, down to the minute after the lead is entered into the campaign.

For example, if you have a handful of leads that are much closer to being ready to buy than others, you can set up a workflow to send them three emails per week instead of one.

If your leads who own small businesses respond better to emails sent on the weekends, you can set your workflow for these leads to only trigger emails to send on Saturdays and Sundays, and maybe just in the mornings.

Workflows Are Smarter Than Standard Marketing Automation

Workflows give you the flexibility to define the actions you want to trigger, your own rules for triggering them, and the timing of each part of the process. In other words, they give you the tools to segment and nurture your leads better.

Not only will workflows help you do smarter marketing, they'll also help you save time. Just set up your campaigns, and once they're live, they'll simply keep running with no active work required on your part. No need to be constantly sending a new batch of emails every time you add more leads to your list: these leads will be added to your workflows and you won't have to do a thing.

When Is the Right Rime to Start Using Workflows?

More effective marketing? Saving time? Converting more of my leads to customers? Alright, you've got me hooked! But how do I know when it's the right time to start using workflows in my marketing?

There's no explicit answer for this, and it's really up to you when you want to start integrating workflows into your marketing strategy, but we will offer you some indications that it's time to think about getting started with workflows. If any of these are true of your marketing process, you should consider using workflows to improve your lead nurturing and make your marketing more effective.

Indications It's Time to Use Workflows

- You're generating leads but ignoring the ones that are not yet ready to buy.
- Your sales team is unhappy with the quality of the leads you're sending them.
- You're sending the same emails to your entire list.
- You're collecting valuable lead information, but not using it for segmentation.
- You're not targeting your offers & messaging based on your leads' needs.
- You're sending or following up to all of your emails manually.
- You're mass updating contact information manually.
- You want to convert more leads to customers with better lead nurturing.

> *What makes up an actual workflow? Let's dive in and take a look!*

CHAPTER 2

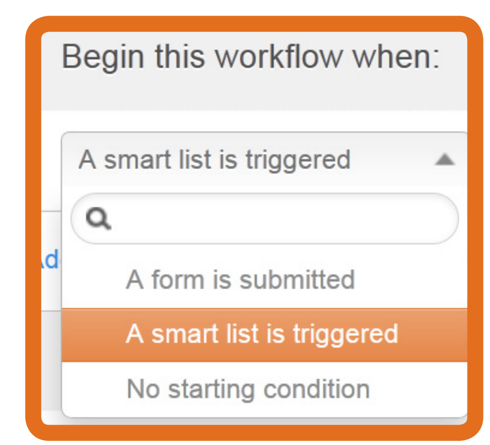
WORKFLOW COMPONENTS

Now that we've discussed what workflows are and how they can help you improve your lead-to-customer conversion rate, let's dive in and take a look at what makes up an actual workflow.

Starting Condition

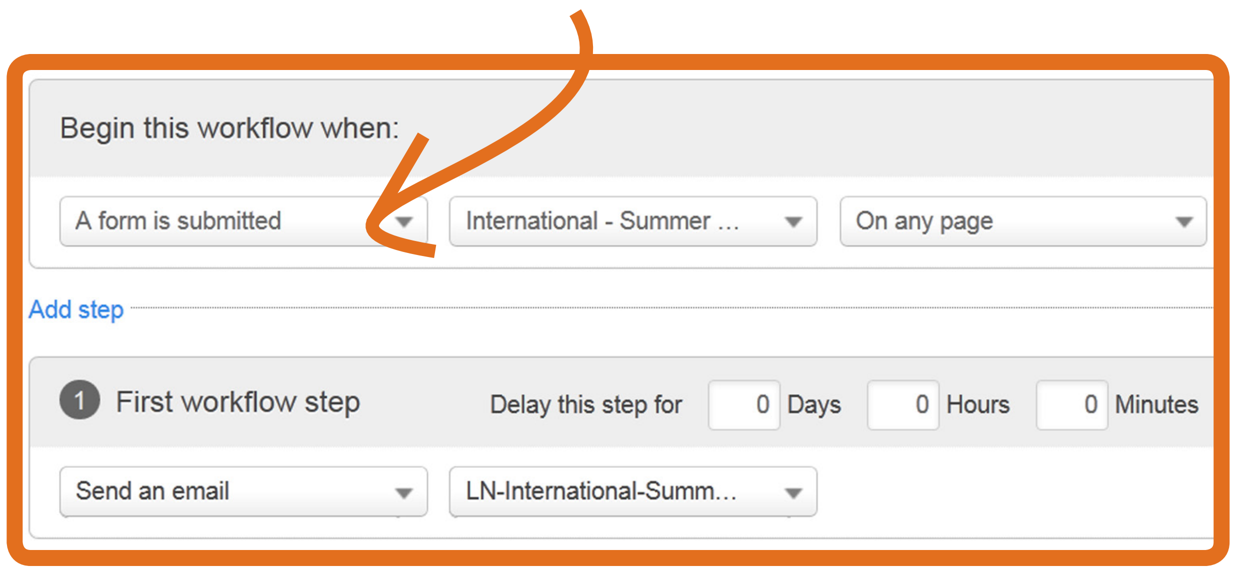
In order to create a workflow, you need to provide a starting condition, or criteria which, if met by a given lead, will trigger the workflow to begin for that lead. HubSpot's Workflows app, for instance, provides three options for a starting condition:

1. A form is submitted
2. A smart list is triggered
3. No starting condition



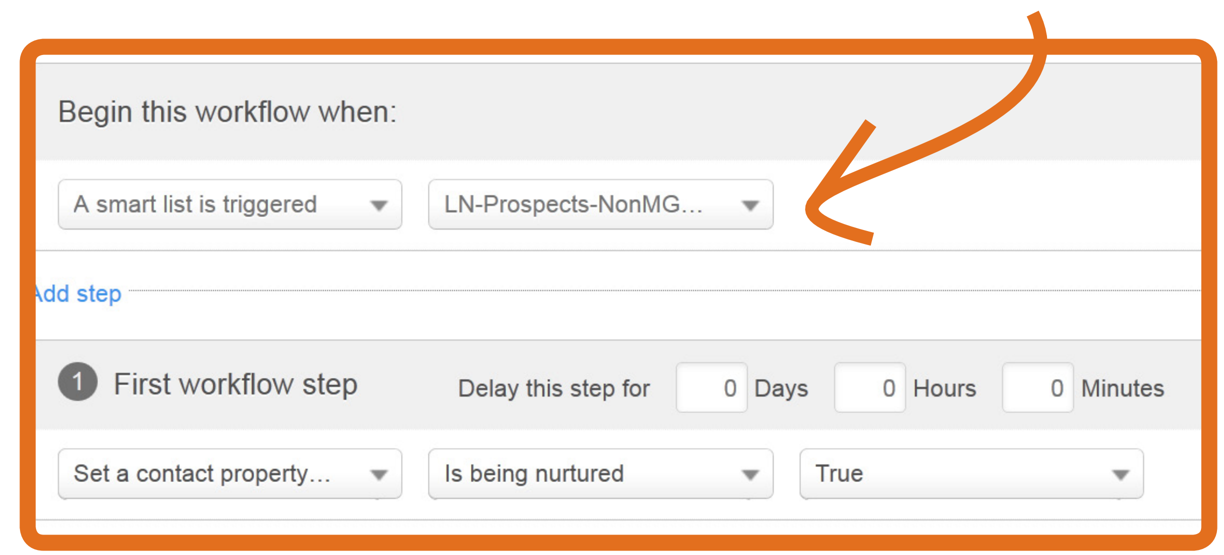
1 A Sample Workflow When a Form Is Submitted

The first option is to trigger a workflow when a given form is submitted. This is useful when you want to send emails to follow up to a specific download on your site. For example, let's say you have a landing page with a form to download a specific ebook. Maybe you want to set up a nurturing campaign to engage the people who download this ebook with more content about that specific topic. You can create a workflow with emails tailored to these topics and automatically enter any lead that downloads this ebook into that workflow. Here is an example of what that setup might look like:



2 A Sample Workflow Triggered by a Smart List

You can also trigger a workflow when a lead is added to a certain list. You can design these lists to include only leads that meet certain criteria for contact properties or behaviors. In HubSpot, you can create smart lists, or lists based on specific criteria that dynamically update to include any leads that come to meet that criteria:

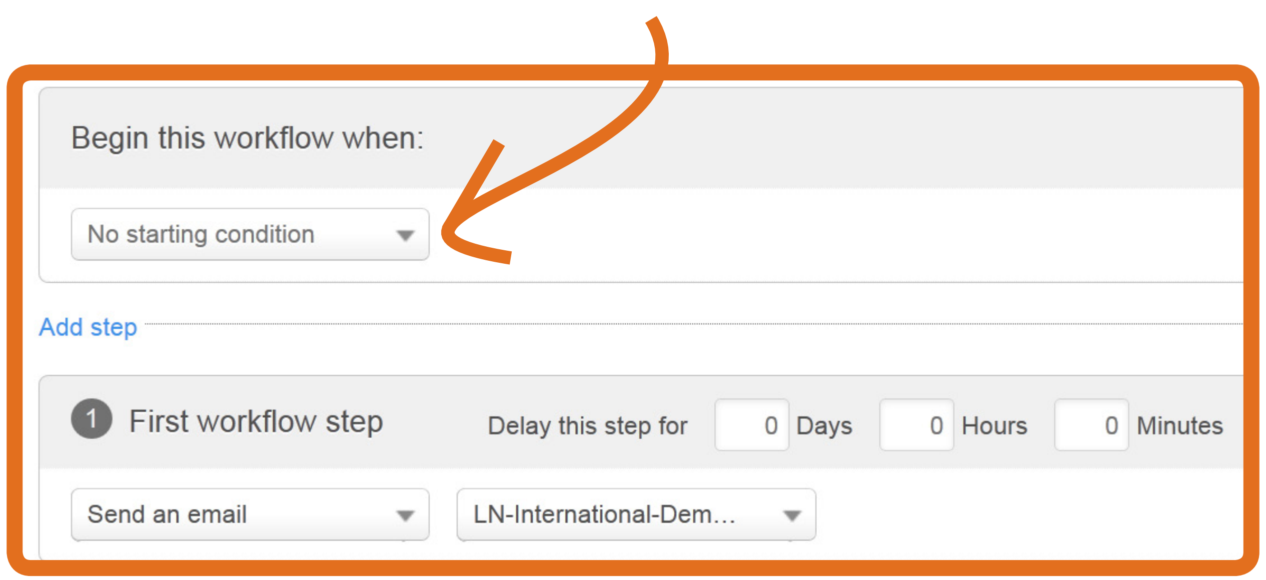


For example, you can create a smart list of leads who have visited your website a certain number of times, or a list of leads who have requested a free trial of your product, or a list of leads who live in Texas and have fewer than 50 employees, etc. You can use any information from your contact database to create these smart lists, and then trigger workflows based on those. This gives you a wide range of possibilities for the rules you can set up for each of your workflows.

3 A Workflow With No Starting Condition

Lastly, you should also be able to set up a workflow that doesn't have a starting condition. This simply means that you only want to add contacts to the workflow manually.

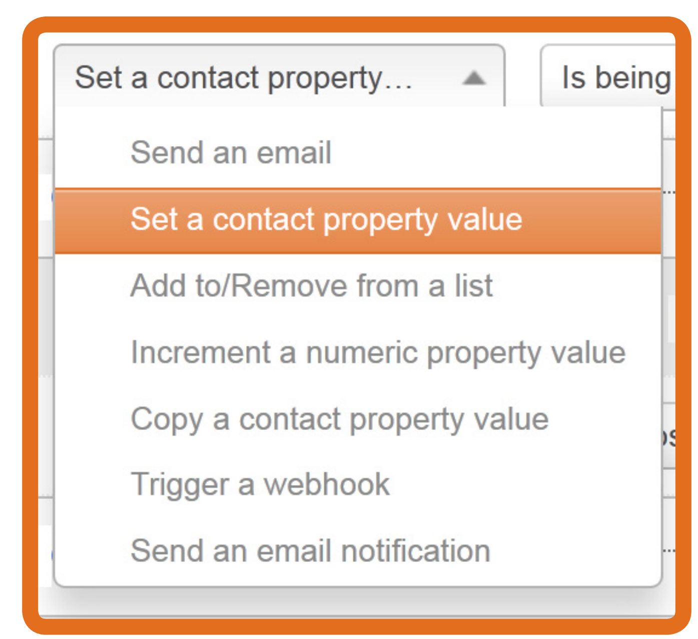
For instance, if you host a conference or another type of marketing event and want to create a workflow for the leads you drive from it, you might upload that list and add it to the workflow on its own. Or if you engage in a comarketing initiative, you can import a list of opt-ins and nurture them with a specific set of emails.



Actions

Now we get to the meat of the workflow – the sequence of actions that it triggers. Much like starting conditions, there are a few different types of actions that you can initiate with your workflows:

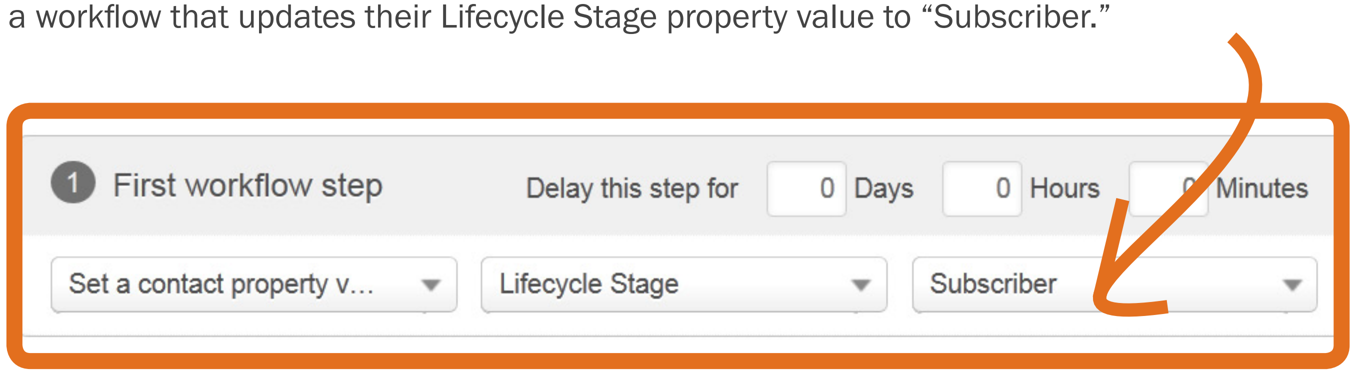
1. Setting a contact property value
2. Sending an email
3. Adding a contact to a list or removing them
4. Sending an email notification



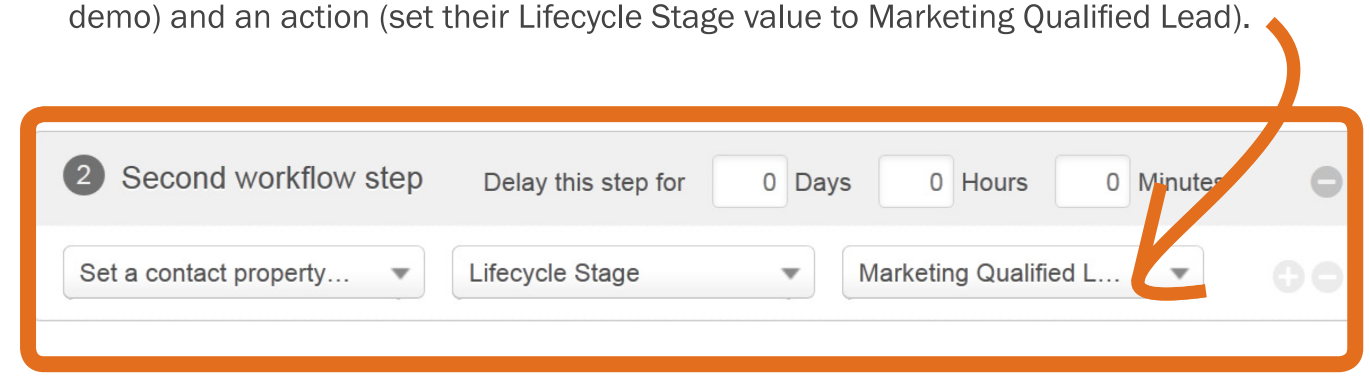
1 Setting Up a Contact Property Value

As we discussed earlier, workflows can be used to change or update information about your leads in their contact records. This gives you an extremely easy way to perform mass updates to your database, instead of going in and making changes to each lead record, one at a time.

Let's say you have a handful of new contacts that you want to mark as subscribers in your database. You can simply create a list of these new contacts and enter them into a workflow that updates their Lifecycle Stage property value to "Subscriber."



Maybe you have a contact field that indicates whether or not a lead has requested a demo of your product. You can immediately set these contacts apart in a way that demonstrates that they are high quality leads. For instance, you can create a workflow that says, "If a lead's Demo Requested property value is equal to True, change that lead's Lifecycle Stage to Marketing Qualified Lead." In this case, you have a starting condition of a smart list (as a member of a smart list requests a demo) and an action (set their Lifecycle Stage value to Marketing Qualified Lead).



Or maybe you want to create a workflow that changes specific contact information of your contacts. For instance, you can take a list of leads whose company name value is blank, and change them all to the value "unknown."

2 Sending Automated Emails

The second type of action that you can trigger in a workflow is sending an email. This is probably the most intuitive use case for workflows because it allows you to nurture your leads with a targeted series of emails.

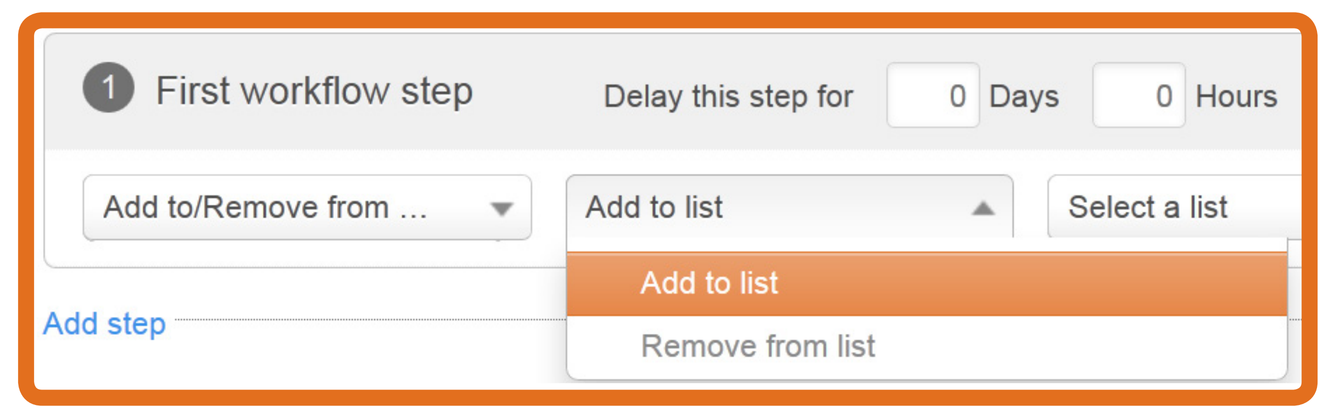
With HubSpot, you can take emails that you've created and save them specifically for automation, which then allows you to select those emails when you're setting up a workflow. So now, you can create each of your emails ahead of time, and build workflows to schedule these emails to be sent in the order you want with the timing of your choice.

You can include as many steps in a workflow as you'd like – you can build a nurturing campaign with two follow-up emails and another one with six follow-up emails. The campaigns can span five days, two weeks, or three months. No matter how you choose to set them up, your workflows will take the pain out of lead nurturing by simplifying and automating the entire process.

3 Add a Contact to a List or Remove Them

The third type of action that a workflow can perform is adding a contact to a list or removing a contact from a list. This is another great organizational tool to simplify the way you handle your lists of leads by automating the otherwise manual process.

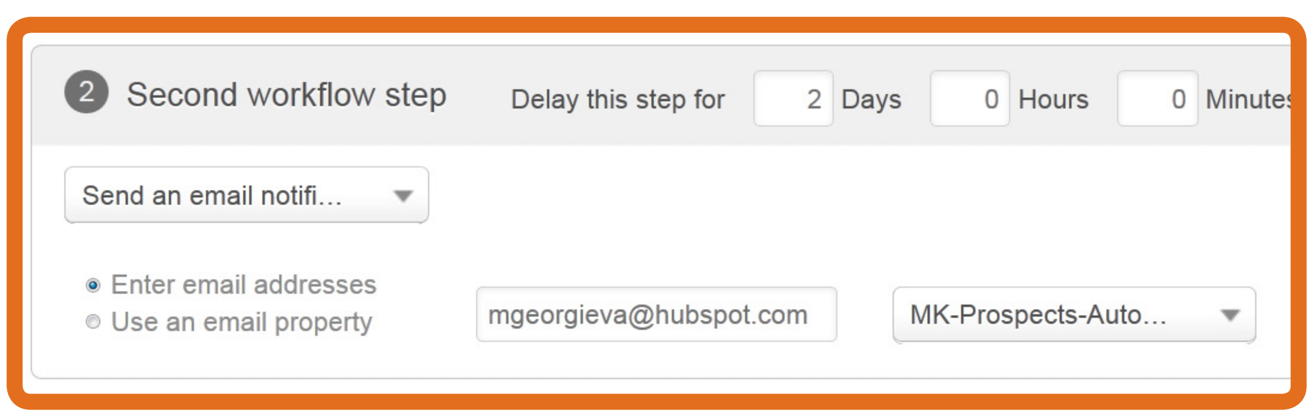
For example, you might be hosting a webinar and have a landing page with a form that lets people register for that webinar. You could set up a workflow that takes any leads who submit that form and adds them to a list of webinar registrants. Again, here you have a starting condition (submits webinar form) and an action (add to webinar registrants list). Couldn't get much simpler than that!



4 Send Email Notification

The last type of action you can add to a workflow is sending an email notification. This feature allows you to send a notification to a specific address the minute that something important happens to one of your contacts.

This has a vast number of possible uses. You can set up a notification email to alert a sales representative when someone submits a key form, like a pricing information download or a bottom-of-the-funnel offer. You can also use this feature to notify a sales rep when a lead becomes sales qualified, hits a specific lead score threshold, or when any other property on their contact record changes.



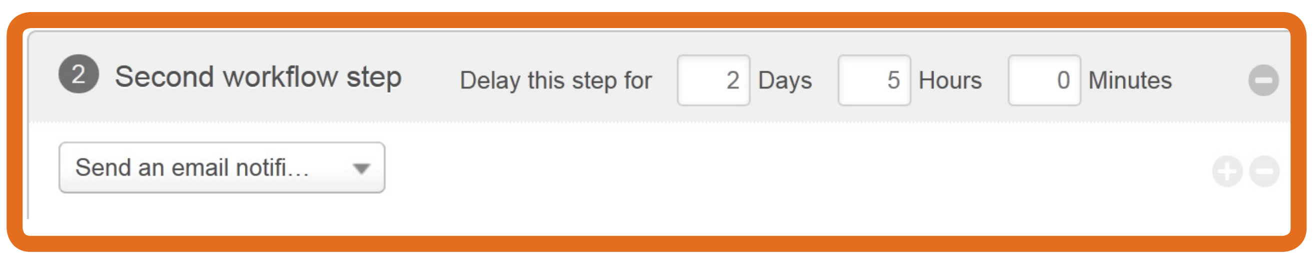
You could even set up a notification for your social media manager to trigger when a lead who is a “social media influencer” comes into the system, based, for instance, on their Twitter follower count. Workflows make it easy to keep track of these important changes, so you know which of your leads are warmest, and can act on that information immediately.

The great thing about workflows is that you can add multiple actions to a given workflow in whatever order you choose – and they don’t all have to be the same type of action!

You could create a workflow whose starting condition is “submits webinar form,” in which the first step is “add to webinar registrants list,” the second step is “update Lifecycle Stage to Lead,” and the third step is “send demo offer for webinar registrants email.” Now you’re all set to perform three distinct actions for every single lead that fills out that form, without having to do a thing once you’ve set up that simple workflow.

Time Delays

Workflows should allow you to select the timing of each action they trigger. For every step you add to a workflow, you can say "I want these leads to receive this email two days after they fill out this form, and the next email five days after that." You can update contact properties or add them to a list as soon as the leads are entered into the workflow by setting the time delay to zero. You can spread out the actions over as much time as you'd like, and specify timing down to the number of days, hours, or even minutes.



Time delays are unique to each individual lead. So when John Doe enters your workflow on a Monday, he'll get the email two days later on Wednesday, but Mary Jane, who entered the workflow on Tuesday, will get the email two days after her workflow began, on Thursday. You weren't really going to send John an email on Wednesday and send Mary a separate email on Thursday on your own, were you?

That would be a total pain. You probably would've just picked one of those days to send the email to the entire list of your leads, and sacrificed the effectiveness of aligning the timing of your marketing with your leads' needs.

ALIGNMENT

With workflows, you can just schedule everything to send automatically and you don't have to worry about keeping track of who needs to get what on which days. And more importantly, you can time your marketing based on what's best for your leads, not what's easiest for your busy schedule.

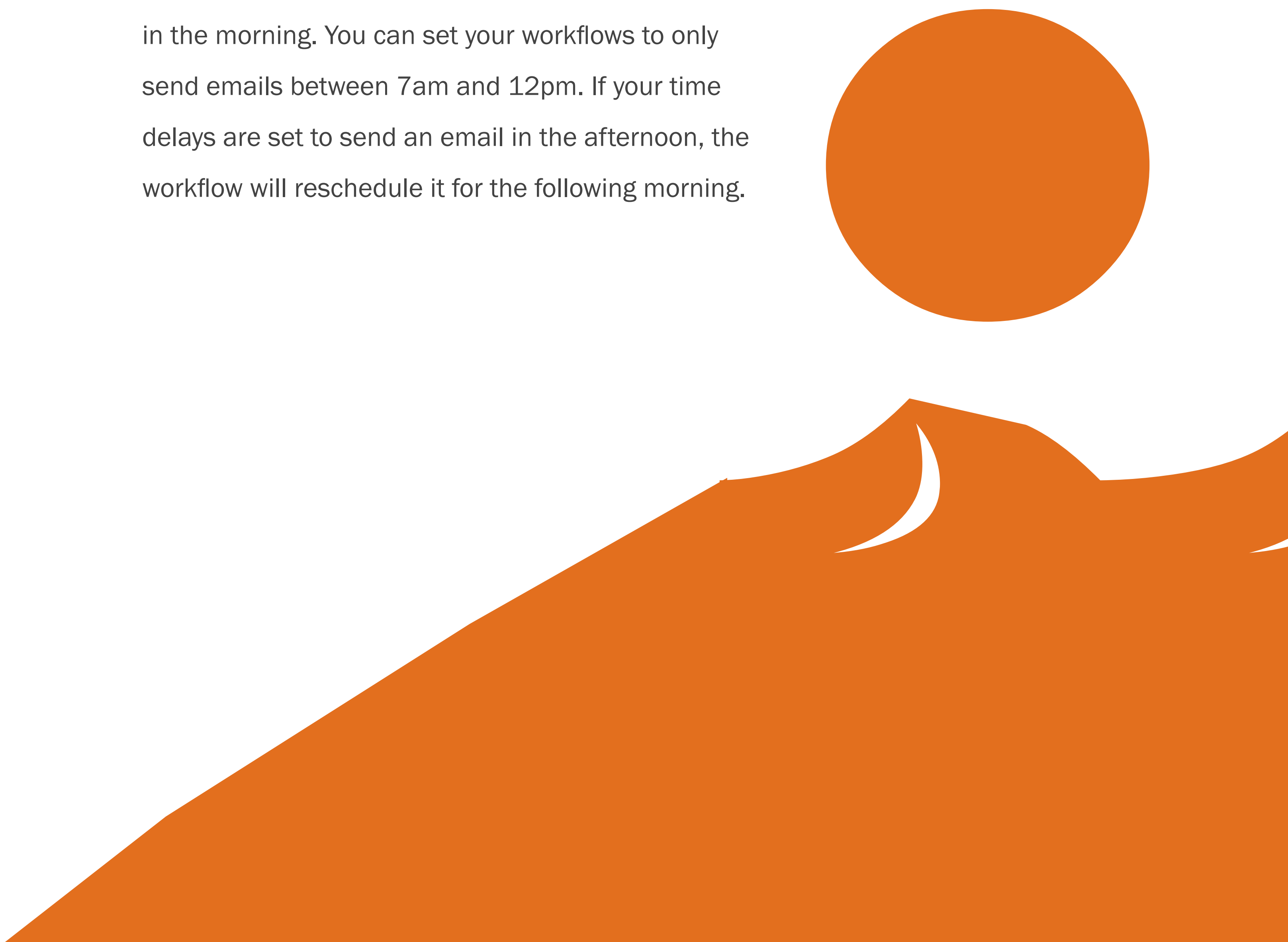
Settings

The last main component of a workflow is its settings. There are various settings that you can arrange to refine the way your workflows operate, and you can use these to your advantage to make your workflows more effective.

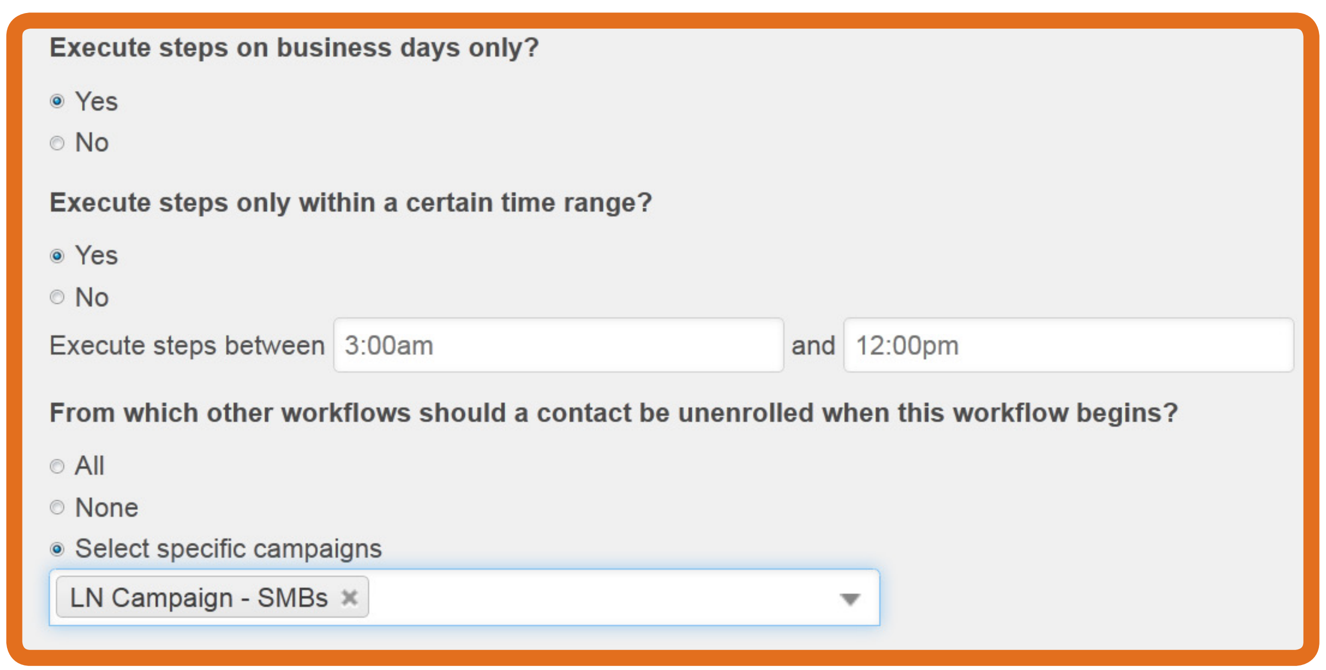
One option is to set your workflow to execute steps on business days only. If you don't want to be emailing your leads on the weekends, you can turn this setting on, and it will override the time delays that you've selected when necessary. In other words, any steps that are scheduled to occur on a Saturday or Sunday, (say, an action is set to trigger one day after the previous one, which occurred on a Friday) it will be rescheduled to occur on Monday.

There is also a setting to execute steps only within a certain time range. This setting also overrides the time delays you've selected when necessary.

Let's say you've done some research on the effectiveness of your email marketing, and you've found that your highest clickthrough rates occur in the morning. You can set your workflows to only send emails between 7am and 12pm. If your time delays are set to send an email in the afternoon, the workflow will reschedule it for the following morning.



Another useful feature is the setting that allows you to unenroll contacts from other workflows when a specific workflow begins. If you have multiple workflows set up (which presumably you do), you need to make sure that they all work together. In other words, if one workflow updates Lifecycle Stage to “Customer” for any leads who become customers, you probably want to remove them from your other lead nurturing workflows. This is easy to do – you simply adjust the setting on your *Customers* workflow to remove those contacts from all other workflows once that workflow begins. Here is a screenshot of HubSpot’s Worflow App Settings:



It’s also possible to select only certain workflows from which you’d like to unenroll contacts. This allows you to prioritize and move contacts through different nurturing workflows while leaving them in other “administrative” workflows, such as ones that are used to update contact properties.

In conclusion to this chapter, let’s recap the main points we have covered. To build a workflow, you must first select a starting condition, then choose the actions you’d like the workflow to trigger, determine the order and timing of those actions, and adjust the workflow settings as appropriate. Once you have these four main components covered, you’re ready to launch your workflow!

CHAPTER 3

WORKFLOW SEGMENTATION IDEAS

> *"If you're collecting all this data about your leads from your landing page forms and tracking their activity on your site, why not put this information to good use?"*

One of the beautiful things about workflows is that you can use them to target your nurturing emails and strategies much more precisely. If you're collecting all this data about your leads from your landing page forms and tracking their activity on your site, why not put this information to good use?

Figure out which properties and behaviors are strong indicators of the likelihood of a lead to download a certain offer or take a specific action, and match your calls-to-action to your email recipients.

Segment by Topic of Offers Downloaded

If you can group the offers you're sending to your leads by topic, seeing which topics interest each of your leads is valuable information. For example, if you run a company that sells home and garden appliances, you may find that your leads who are reading your ebooks about gardening would like to learn more about that topic, and aren't interested in receiving information about interior design.

If you're sending your leads content that actually interests them, and educating them on topics they're looking to learn more about, you'll have a better chance of improving your conversion rates.

Segment by Lifecycle Stage

> *"It's crucial to know how far along in your buying cycle a given lead is in order to target that lead effectively."*

You want to make sure you're sending your leads content that is appropriate for their Lifecycle Stage. If a lead is still in research mode, it may be too early to send her an offer to try out your product, and you might want to stick to educational resources. However, if a lead has already received a demo of your product, you should focus on getting her to speak with a sales rep, rather than sending her additional early-stage information.

Segment by Page Views or Lead Source

The pages of your website that a given lead has viewed and the source through which a lead found your site in the first place are both valuable pieces of information.

For instance, if you know that a lead has visited your pricing page, especially if she has visited that page multiple times, that's a great indication that she's pretty far along in your buying cycle and you should be sending her product-related content and sales-focused offers.

In terms of lead source, you may find that leads who find your site through organic search convert at higher rates than those who find you through your blog. Maybe you should target video content to your YouTube subscribers, or send more text-heavy offers to your blog readers. There are numerous possibilities for segmenting based on lead source.

Segment by Contact Properties

You can also use various other contact properties to create workflows that are appropriate for certain categories of leads. Perhaps you're hosting an event in Boston next month, and you want to create a workflow for your leads on the East Coast.

Or maybe you have a different workflow for your leads who are marketers than for your leads who are business owners. If you have a contact property that indicates whether or not a lead has spoken to a sales rep, you can segment based on that, or even create a different workflow for those who have spoken to a rep in the last three months, six months, year, or five years.

Once you determine which contact properties and behaviors have the greatest impact on conversion rates, test out segmentation based on that information, and see if more precise targeting will help the performance of your nurturing campaigns.

CHAPTER 4

RECOMMENDED STRATEGIES FOR YOUR WORKFLOWS

"You need to optimize your workflows to strengthen your lead-to-customer conversion rate and make your marketing more effective as a whole."

Okay, so now you know how to build a workflow. What's next?

As a marketer, you know that it's not enough to simply throw some parts together and see what happens. You need to optimize your workflows to strengthen your lead-to-customer conversion rate and make your marketing more effective as a whole.

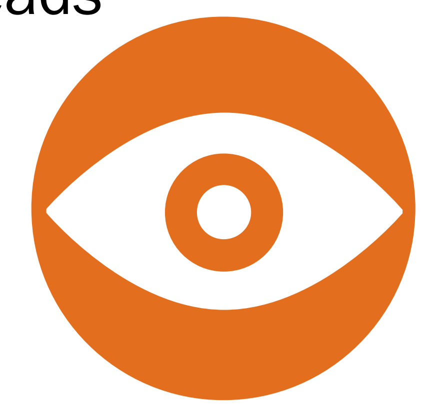
How do you do that? In this section, we'll cover some recommended strategies for your workflows, and suggest a few great ways to use this tool to improve your marketing.

Schedule Multiple Emails

While workflows are also great for scheduling follow-up emails to pair with form submissions, its real power lies in lead *nurturing*. To take full advantage of the tool, set up workflows that follow up with your leads over time and address their needs in stages, rather than only attempting to get them to take action once.

Keep Track of Nurtured Leads

Speaking of using workflows to nurture your leads, you'll want to keep track of which of your leads are enrolled in a nurturing workflow, so you don't send them additional marketing emails on top of the automated ones.



We'd recommend creating a contact property called "Is being nurtured." Then you can set this contact property to "True" as the first step of your workflow, and reset it to "False" as the last step. Bracketing your workflows with these property changes is a simple way to assign this data to each of your leads, and suppress the ones you're nurturing from your other email sends.

Use Workflows for Admin Tasks

Use workflows to do your administrative work. You really should stop doing mass updates to your contact information one record at a time.

Your time as a marketer is extremely valuable, and there's no longer a need to waste it on menial tasks like this. Simply create a workflow to update your contact records for you on a rolling basis, and start using your time more effectively.

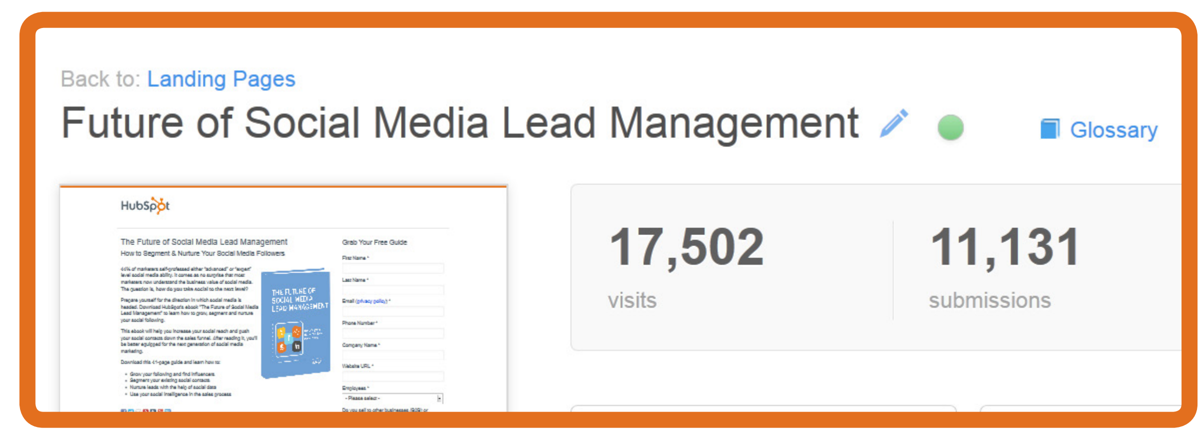
Monitor Timing

Because workflows let you automate multiple steps and emails over time, the timing that you choose is a very important factor in determining the effectiveness of your campaigns. See if you can dig up some data on the performance of your marketing emails based on timing – which days of the week yield the highest conversion rates? How many emails do you send per week? This data may help you get started with a good timing strategy.

You can also test the timing of your workflows by creating two versions of the same workflow with different time delays, and look at the results of your A/B test to determine if the difference has a significant effect.

Track Email & Landing Page Metrics

In order to tell how well your workflows are performing, you should keep track of your email engagement and landing page statistics. Are your clickthrough rates higher for some emails than others? Are your landing page conversion rates above average? Here is an example of HubSpot's landing page analytics:



Ensure Your Workflows Get Along

If you build out a large number of workflows, or even just a handful, make sure that they work together properly. Is one workflow accidentally removing leads from another workflow when it shouldn't be? Can a lead be enrolled in two, three, or four workflows at once, if necessary?

The flexible settings of the workflows tool are great for giving you more control over your workflows, but you need to make sure that there are no unwanted obstructions or interferences among them so that they all function properly.

CONCLUSION & ADDITIONAL NOTES

"Workflows empower you to do better marketing."

Workflows empower you to do better marketing. By setting up automated email campaigns, triggering immediate notifications, and performing contact property updates on a rolling basis, workflows equip you with the tools to be a smarter marketer.

With workflows you can build strong relationships with leads through more targeted nurturing, keep your sales team in the know about important changes to the leads they're working, and save more time to focus on other areas of your marketing.

And the best part is, you can adapt your use of workflows to your own needs, your own database, and your own strategy, so you can start converting more leads to customers for your business right now.

SET UP WORKFLOWS WITH HUBSPOT

Ready to create some workflows? Get a head start. Request a custom demo of HubSpot and learn about our Workflows app, Smart Lists and other marketing features.

http://bit.ly/Get-A-Demo-of-HS