How to Create Qualified Leads with Lead Nurturing

INTERMEDIATE

#InboundLearning

Audio

Audio Mode: ○ Use Telephone
● Use Mic & Speakers

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Audio Setup

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

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@ChrisLoDolce

AGENDA

1 Building your campaign framework

2 Choose target persona & campaign goal

3 Map your campaign & build a Smart List

4 Setting email goals, writing & saving emails

5 Webinar tasks & resources

1

BUILDING YOUR CAMPAIGN FRAMEWORK

Create a generic **set of rules** to determine each **stage of the buying process**

SET RULES FOR EACH STAGE OF THE PROCESS:

What behavior changes the lead's status?

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								

SET RULES FOR EACH STAGE OF THE PROCESS:

Perform Research

Lead downloaded:

ANY OF THESE
Free whitepaper
Free guides & tip-sheets
Free eBooks
Free checklists
Free videos
Free kits (combo of above)

What behavior changes the lead's status?

SET RULES FOR EACH STAGE OF THE PROCESS:

Establish Buying Criteria

Lead downloaded:

3 whitepapers
OR ANY OF THESE:
Free webinars
Case Studies
Free Sample
Product spec sheets
Catalogs

SET RULES FOR EACH STAGE OF THE PROCESS:

Evaluate Vendors

Lead downloaded:

What behavior changes the lead's status?

2 WEBINARS AND A CASE STUDY
OR ANY OF THESE:
Free trials
Demos
Free Consultations
Estimates or quotes
Coupons

Buying Process Rules (example)

1. **Perform Research:** Any lead that has filled out 1 or 2 of the following forms is considered a "perform research" stage lead. Offers: **Ultimate guide, industry trends whitepaper, etc.**

2. **Establish Buying Criteria:** Any lead that has filled out 3+ "perform research" stage offers or has completed 1 or 2 of the following "establish buying criteria." Offers: **Webinar, Purchasing checklist, workbook, feature comparison guide, case study**

3. **Evaluate Vendor:** Any lead that has filled out 2 webinar forms and downloaded a case study or has completed one of the following "evaluate vendor." Offers: **Free demo, free consultation, free trail, free estimate**

Setup Buying Process Rules List

Describe the contacts who should be in this list

	Lead	has filled out ▾	Webinar 1 ▾	➕➖

Refine by: time period

AND

	Lead	has filled out ▾	Webinar 2 ▾	➕➖

Refine by: time period

AND

	Lead	has filled out ▾	Case Study ▾	➕➖

Refine by: time period

OR

	Lead	has filled out ▾	Request a demo ▾	➕

Refine by: time period

Setup Buying Process Rules Workflow

Begin this workflow when:

| A smart list is triggered ▼ | BP Stage - Evaluate Vendor ▼ | ⊕ |

Add step

1 First workflow step   Delay this step for [0] Days [0] Hours [0] Minutes   ⊖

| Set a contact property v... ▼ | Buying Process Stage ▼ | Evaluate Vendor ▼ | ⊕ ⊖ |

2 CHOOSE TARGET PERSONA & CAMPAIGN GOAL

Choose your target persona

Persona Name

GOALS OF THE CAMPAIGN:

- Persona's primary goal
- Persona's secondary goal

CHALLENGES OUR CAMPAIGN SOLVES:

- Primary challenge to persona's success
- Secondary challenge to persona's success

HOW OUR CAMPAIGN SOLVES OUR PERSONAS' CHALLENGES:

- Offer that solves your persona's challenges
- Offer that helps your persona achieve goals

Conduct interviews with your target audience to learn about their goals and challenges in more detail.

Set a SMART goal for the campaign

S.M.A.R.T. Goal Setting

1 **Specific:** Significant, Simple

2 **Measurable:** Meaningful, Manageable

3 **Attainable:** Appropriate, Achievable

4 **Relevant:** Results-oriented, Realistic

5 **Timely:** Time-oriented, Time-based

Define a SMART Campaign goal:

Move 5% of new director level "perform research" stages leads through to the "evaluating vendor" stage within a month of becoming a new lead.

Assumptions:
- "Perform research" stage leads are categorized as eBook downloads, whitepaper downloads, checklists and guides
  - ✓ Exclusions: Purchasing checklist & feature comparison guide
- "Evaluate vendor" offers include; free demo, free trial, free consultation & free quote.
  - ✓ "Evaluate vendor" to customer conversion rate should not drop below 10%

3 MAP YOUR CAMPAIGN & BUILD A SMART LIST

Start with the buying process worksheet & structure the campaign using the worksheet

LEAD NURTUING 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.patientadvoc	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						

Create a segment of 1 by segmenting your database into Smart Lists

Build a Smart List based on your target persona

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.

4

SETTING EMAIL GOALS, WRITING & SAVING EMAILS

SET A
GOAL FOR
EACH
EMAIL

Determine a goal for each email:

Email 1: Build trust and relevancy of content with the lead to increase the chance of future emails being opened

Email 2: Provide an offer that moves the lead into the "establish buying criteria" phase of the buying process if completed

Email 3: First of two emails with the goal of getting the lead to submit an "evaluate vendor" offer. Specifically Request a 30 minute consultation

Determine a goal for each email:

Email 4: Second of two emails with the goal of getting the lead to submit an "evaluate vendor" offer if they have not already. Specifically for 30 day free trail

Email 5: Breakup email: Make it clear this is the last email and try to get the lead to subscribe to the blog to stay engaged

Create a story with your campaign

Suggested Timing: Day 1

Purpose of Email 1: To show value in the establish buying criteria stage of the buying process and get them to read your blog article on understanding product/service specific benefits and features

Overall Email 1 Notes:
- Try to have two similar length short paragraphs with a hyper link with different anchor text, 1 in each paragraph.
- You will know if they are ready for this stage if you see a 15%-25% click through rate. This could vary, if you consistently see higher or lower click through rates use your own data to benchmark future lead nurturing email success.
- Make sure the blog you are using has a CTA at the bottom for either (or both) an establishing buying criteria content offer and/or Evaluate vendors content offer

Suggest Timing: Day 2-4:

Purpose of Email 2: Provide a useful content offer to help move a lead into establishing buying criteria stage of the buying process and get them to begin seriously thinking about benefits & features. Should be an offer behind a landing page

Overall Email 2 Notes:
- Try to have two similar length short paragraphs with a hyperlink with different anchor text. 1 hyperlink in each paragraph to the same landing page.
- A click through rate of 10%-20% can be expected. This could vary, if you consistently see higher or lower click through rates use your own data to benchmark future lead nurturing Workflow email success.
- Make sure the landing page is closely connected to what you promised/proposed in the email

Suggested Timing: Day 5-7

Purpose of Email 3: Have leads download a feature selection worksheet or similar content offer to solidify their move from the research stage to the establishing buying criteria stage

Overall Email 3 Notes:
- Try to have two similar length short paragraphs with a hyperlink with different anchor text. 1 hyperlink in each paragraph to the same landing page.
- A click through rate of 7%-14% should be expected. This could vary, if you consistently see higher or lower click through rates use your own data to benchmark future lead nurturing Workflow email success.
- Make sure the landing page is closely connected to what you promised/proposed in the email. Have the Thank You page propose an evaluate vendor content offer

Suggested Timing: Day 8-10

Purpose of Email 4: Recap resources, provide blog link to keep them engaged even if they may have not chosen to do business with you

Overall Email 4 Notes:
- Try to make it feel like this is the last email, maybe even explicitly say it
- A click through rate of 3%-8% can be expected. This could vary, if you consistently see higher or lower click through rates use your own data to benchmark future lead nurturing Workflow email success.
- Use a simple bulleted list to recap resources

Write emails & save them for Automation

EMAIL TIPS

Send emails others would like to receive.

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... |

LEAD NURTURING EXAMPLE 1

SMART Goal: Create 20 Marketing Qualified Leads (MQLs) per month

Name

Used for organizing your emails and won't be seen by your recipients

Directors LN Workflow – Email 1

Copy & Paste

Main Content

Message Subject

Inbound Marketing Success Starts with you…ready?

Main Body Text

Hi [FirstName],

We hope you found the "Ultimate guide to Inbound Marketing" helpful in your quest to understand when your company is ready for the new age of marketing.

As a director, you know all too well the importance of keeping ahead of the competition when it comes to innovative marketing techniques. Here are a few additional articles you may find helpful for making a smart strategic decision

- Inbound Marketing - A quantitative marketers dream
- Personalize while automating your marketing
- 5 fail proof ways to increase qualified, sales ready leads

Cheers,
[Signature]

⊙ Send email with automated workflows

Name
Used for organizing your emails and won't be seen by your recipients

Directors LN Workflow – Email 2

Main Content

Message Subject

Pitfalls of Inbound Marketing Agency's – Avoid them!

Main Body Text

Hi again [FirstName],

By now it is most likely clear how and why so many companies are benefiting from Inbound Marketing. Educational content is key for winning the right to communicate with leads as they search for the right solution to meet their needs.

We put together this "5 mistakes to avoid when hiring an online/Inbound Marketing agency" ebook to help you avoid the common pitfalls when selecting the right agency for your Inbound Marketing initiative.

Click here to download the eBook

Cheers,
[Signature]

Copy & Paste

⦿ Send email with automated workflows

Name
Used for organizing your emails and won't be seen by your recipients

Directors LN Workflow – Email 3

Main Content

Message Subject

Your Inbound Marketing Success plan – On Us!

Main Body Text

Hi [First Name]

It's natural to have some questions or concerns when thinking through a decision such as implementing Inbound Marketing. We here at [company name] work with and have provided unbiased recommendations for correctly implementing Inbound Marketing to over 1,000 companies/organizations.

Schedule 30 minutes to discuss with one of our Inbound Marketing experts how you can be most successful leveraging Inbound Marketing.

Request your complementary "Inbound Marketing Success plan" today and spend 30 minutes with one of our Inbound Marketing experts!

Cheers,
[Signature]

Copy and Paste

○ Send email with automated workflows

Name
Used for organizing your emails and won't be seen by your recipients

Directors LN Workflow – Email 4

Main Content

Message Subject

Test Drive Inbound Marketing – Get peace of mind

Main Body Text

Hi [First Name],

Still not sure if Inbound Marketing is right for your company? Why not take a free test drive!

Work with one of our Inbound Marketing experts to discuss how you would leverage Inbound Marketing. Our expert will work with you to execute on your plan for 30 days and review your results for free. A fool proof way to be sure now is the time to impalement Inbound Marketing for [Company Name]

Cheers,
[Signature]

Copy & Paste

◉ Send email with automated workflows

Name
Used for organizing your emails and won't be seen by your recipients

Directors LN Workflow – Email 5

Main Content

Message Subject

Best of luck with your Inbound Marketing!

Main Body Text

Hi [First Name],

Hopefully your quest for understanding if your company is ready for the new age of Inbound Marketing is drawing to a close. We hope you have found the information we provided over the past week helpful and you are well on your way to making a decision as to the best solution for you.

As you are well aware by now, marketing is changing and evolving at a rate never seen before. Signup for our blog to stay up to date on industry trends, new techniques, the weekly info all marketers must stay up to date with.

Signup for the blog here.

Cheers,
[Signature]

p.s. If you have any questions, feel free to setup a time to chat with one of our Inbound Marketing Specialist

Copy & Paste

Send email with automated workflows

LEAD NURTURING EXAMPLE 2

SMART Goal: Generate 15 Free Consultation Leads after Whitepaper download per month

Name
Used for organizing your emails and won't be seen by your recipients

Patient Advocate LN Workflow – Email 1

Copy & Paste

Main Content

Message Subject

Main Body Text

Hi [First Name]

Congrats on being one step closer and a lot more knowledgeable regarding how a Patient Advocate can make your life much more manageable during a healthcare emergency. If you have not yet had a chance or would like to read the 6 signs again, here it is 6 signs you need a Patient Advocate today.

Remember knowing you need a Patient Advocate is just the first step. Now it's time to find a patient advocate that is going to meet your exact needs.

Start your search with private patient advocates as they will have your best interests always in hand, other patient advocates may have ties with healthcare or medical providers and may not be able to stand up for you 100%

Stay tuned for my email tomorrow, I will provide you with a few more tips and things you should make sure the private Patient Advocate provides. Oh and a link to download "The Ultimate guide for interviewing potential patient advocates." as well!

Best,
Signature

Send email with automated workflows

Name

Used for organizing your emails and won't be seen by your recipients

Patient Advocate LN Workflow – Email 2

Main Content

Message Subject

Main Body Text

Hi again [First Name],

As promised here are a few more tips on things you should require from your private patient advocate:
- Are they empathic and caring?
- Are they good negotiators and persistent?
- Is it easy to communicate with them?

Remember the expert tip in the checklist! Communication is the key for success, if they can't communicate well with you, ask yourself how are they going to do when it comes time to negotiate with healthcare and insurance providers?

Download "The Ultimate guide for interviewing potential patient advocates." and feel confident in the patient advocate you choose.

Best,
Signature

Copy & Paste

⦿ Send email with automated workflows

Name
Used for organizing your emails and won't be seen by your recipients

Patient Advocate LN Workflow – Email 3

Main Content

Message Subject

Main Body Text

Hi [First Name],

Have you figured out what exactly you need for your unique healthcare situation?

Spend 30 minutes with an expert in the patient advocate industry to gain a better understanding on must haves, nice to haves and wants based on your budget, time, etc.

Request your free 30 minute consultation today!

Regards,
Signature

Copy & Paste

◉ Send email with automated workflows

Name

Used for organizing your emails and won't be seen by your recipients

Patient Advocate LN Workflow – Email 4

Main Content

Message Subject

Main Body Text

Hi [First Name], (email 4)

By now your paperwork should be dwindling and you should have a good understand of your medical situation, what will be covered by insurance and next steps. If this sounds familiar, congrats on selecting the perfect patient advocate!

Best,
Signature

P.S. If you are still trying to decide, it's probably time you make a decision before the paperwork and bills pile up more. Schedule your free 30 minute consultation today and take the final step towards a peaceful recovery!

Copy & Paste

◉ Send email with automated workflows

5

WEBINAR TASKS & RESOURCES

Webinar Tasks

1 Create the rules for each stage in the buying process

2 Map one lead nurturing campaign using the buying process worksheet

3 Choose the buyer persona to target & set a SMART goal for your campaign

4 Create a Smart List & write the emails

Webinar Resources

1 Lead Nurturing Workbook

2 How to build a smart list [tutorial]

3 How to create an email [tutorial]

4 Intro to 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.