

WHY USE
WORKFLOWS FOR
LEAD NURTURING?

First, what is a Workflow?

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

The screenshot shows the HubSpot interface for a 'Subscriber Nurturing Workflow'. The top navigation bar includes the HubSpot logo and links to Dashboard, Content, Social, Contacts, Reports, and Resources. The user profile for Christopher LoDolce is visible in the top right.

Subscriber Nurturing Workflow

[View all Workflows](#)

Workflow Details

- Edit workflow
- Performance
- History

[Browse Recipes](#)
Explore commonly used lists, emails, and workflows to generate ideas.

Subscriber Nurturing Recipe
Mike Volpe, CMO, HubSpot
This recipe is designed to convert Subscribers into Leads. It gathers all contacts at the Subscriber lifecycle stage and sends them automated emails in an attempt to turn them into Leads.

When activated, this workflow will enroll... Workflow is Live

New contacts in list: All Subscribers ☒ Enroll the list's existing contacts
297351 contacts

Unenroll contacts when they join a goal list (optional)

All Leads

Add step

1 First workflow step Delay for 2 Days 0 Hours 0 Minutes

Send an email: Subscriber Main Nurturing Email [Create Email](#)

Add step

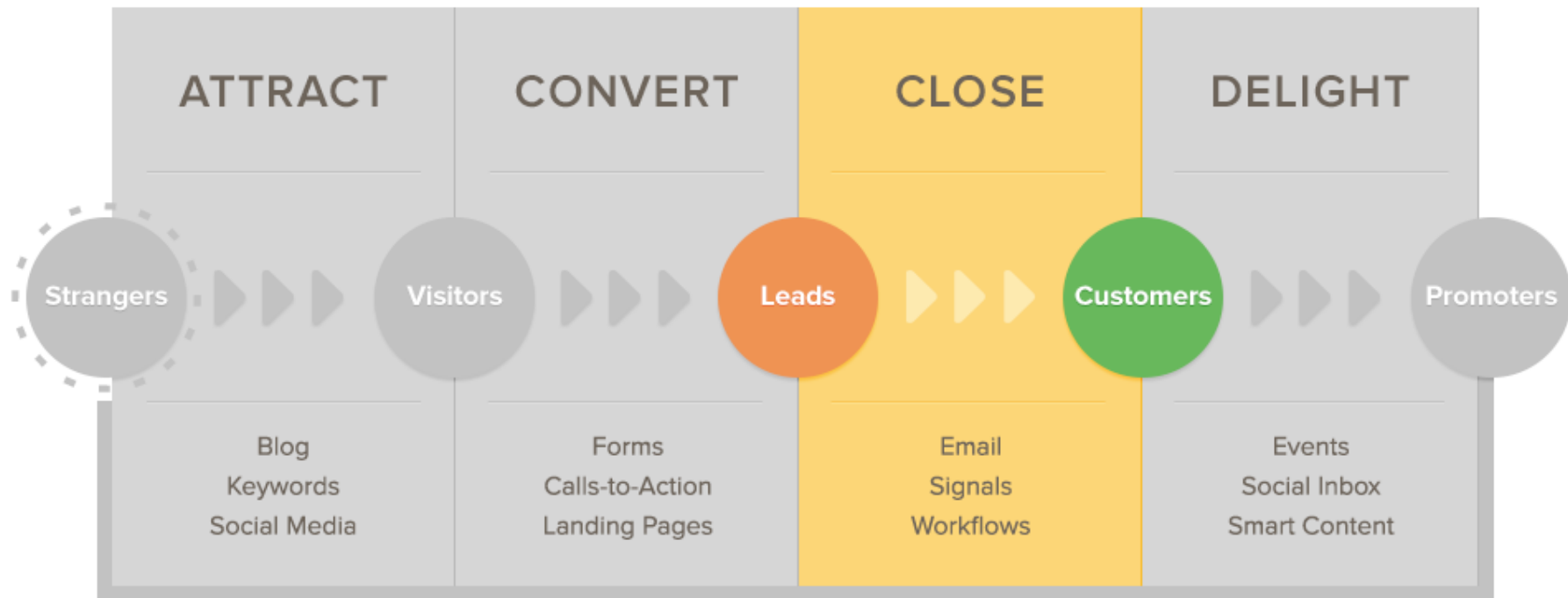
2 Second workflow step Delay for 5 Days 0 Hours 0 Minutes

Second, what is
lead nurturing?

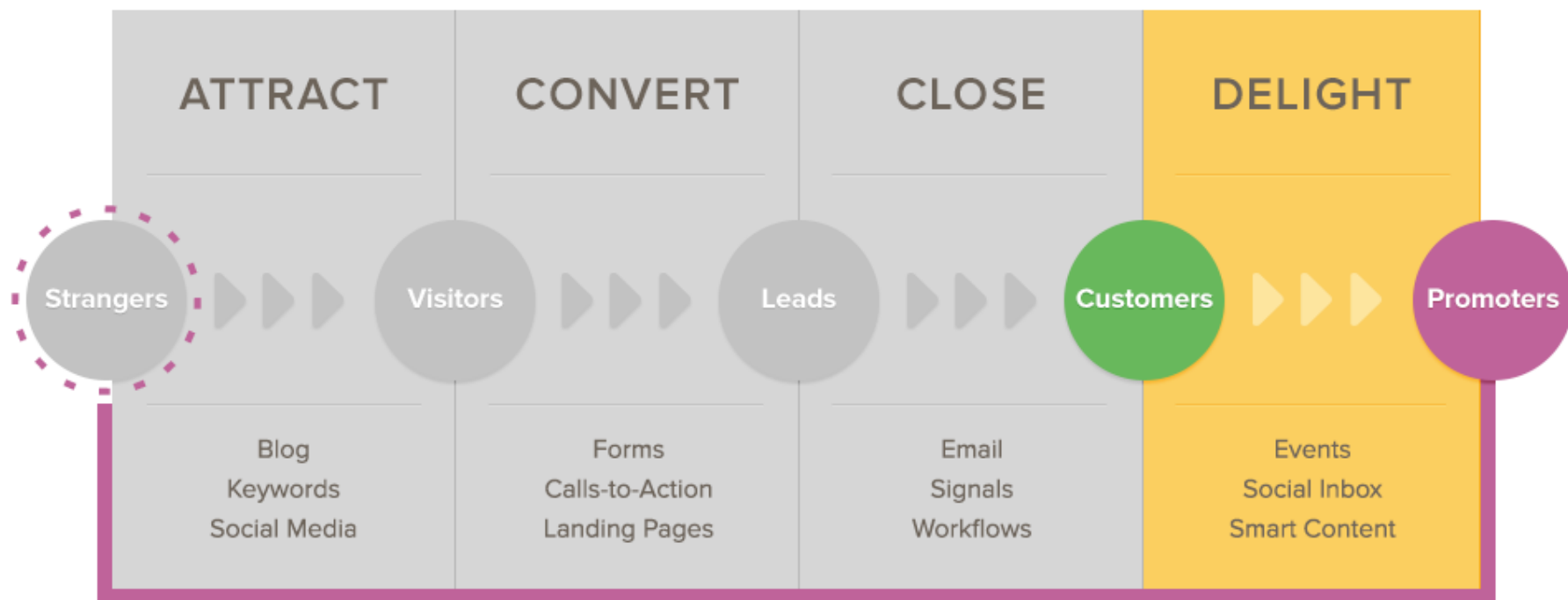


Lead nurturing is the practice of engaging with contacts via automated touches to build a relationship; with the end goal of closing more educated and qualified customers faster.

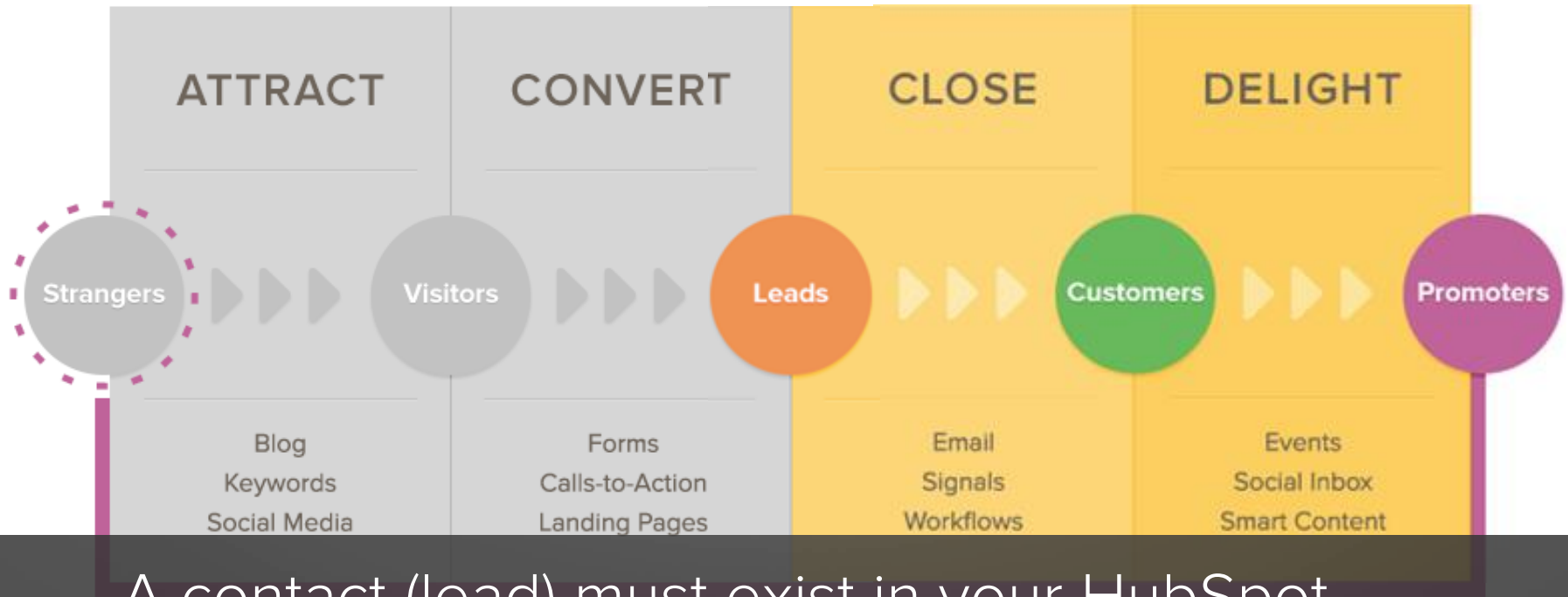
Inbound Methodology



Inbound Methodology



Inbound Methodology











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

BUYER PERSONAS

A wide-angle photograph of a beach at sunset. The sky is filled with dark, heavy clouds, with a bright orange and yellow glow from the setting sun breaking through near the horizon. The sun's light reflects on the water's surface. In the middle ground, a small, dark silhouette of a person stands in the shallow water, facing away from the camera towards the horizon. The waves are gentle, with white foam visible as they wash onto the sandy beach in the foreground.

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

THE BUYER'S JOURNEY

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

3 PILLARS TO LEAD NURTURING WORKFLOWS.



Grow and Nurture Relationships

A stack of several books is shown, with a semi-transparent dark grey banner overlaid at the bottom. The banner contains the text "Educational Content" in white. The books in the stack have various colored spines (red, black, yellow, orange, green) and some have white labels with text like "Ref", "DA", "480", "482", "2001", "1987", "1988", "1989", "1990", "1991", "1992", "1993", "1994", "1995", "1996", "1997", "1998", "1999", "2000", "2001", "2002", "2003", "2004", "2005", "2006", "2007", "2008", "2009", "2010", "2011", "2012", "2013", "2014", "2015", "2016", "2017", "2018", "2019", "2020", "2021", "2022", "2023", "2024", "2025". The background is a warm, yellowish light.

Educational Content



Hyper Personalization

LEAD NURTURING WORKFLOW LOGIC BEST PRACTICES.

CREATE THE LOGIC OF YOUR WORKFLOW

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

LEAD NURTURING WORKFLOW LOGIC BEST PRACTICES



Identify the goal of the workflow



Identify which contacts should be enrolled in your workflow



Select appropriate number and type of emails to send



Choose time delay between emails sent



Identify contacts to suppress from your workflow

LEAD NURTURING WORKFLOW LOGIC BEST PRACTICES



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

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



IDENTIFY THE GOAL FOR THE WORKFLOW

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

LEAD NURTURING WORKFLOW GOAL

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

SET WORKFLOWS GOALS SPECIFIC TO LIFECYCLE STAGES

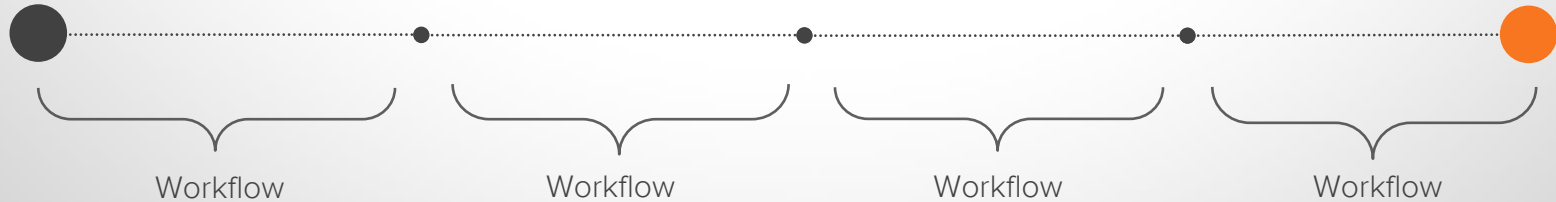
SUBSCRIBER

LEAD

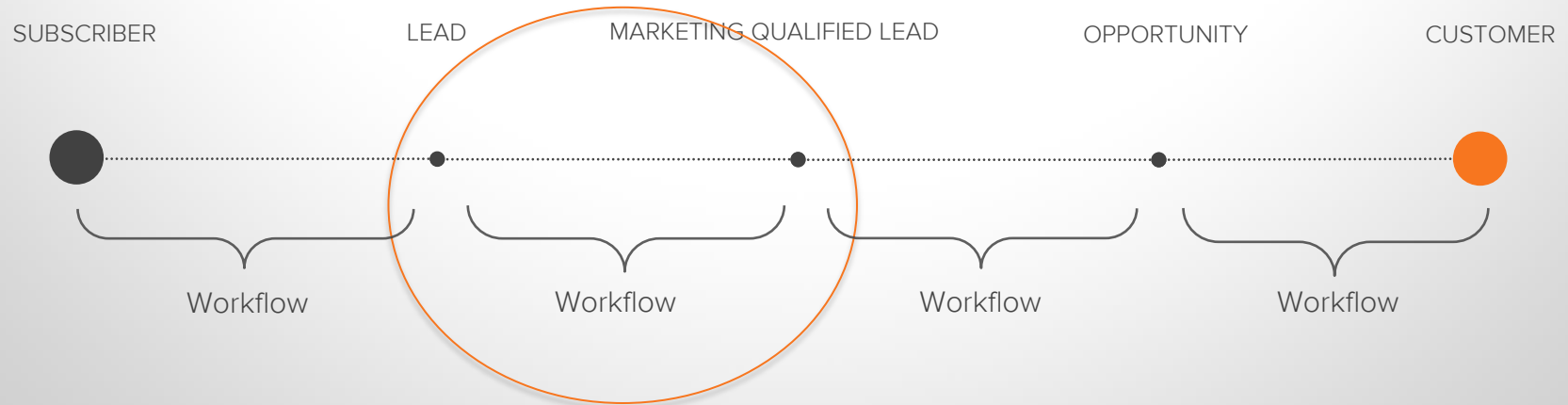
MARKETING QUALIFIED LEAD

OPPORTUNITY

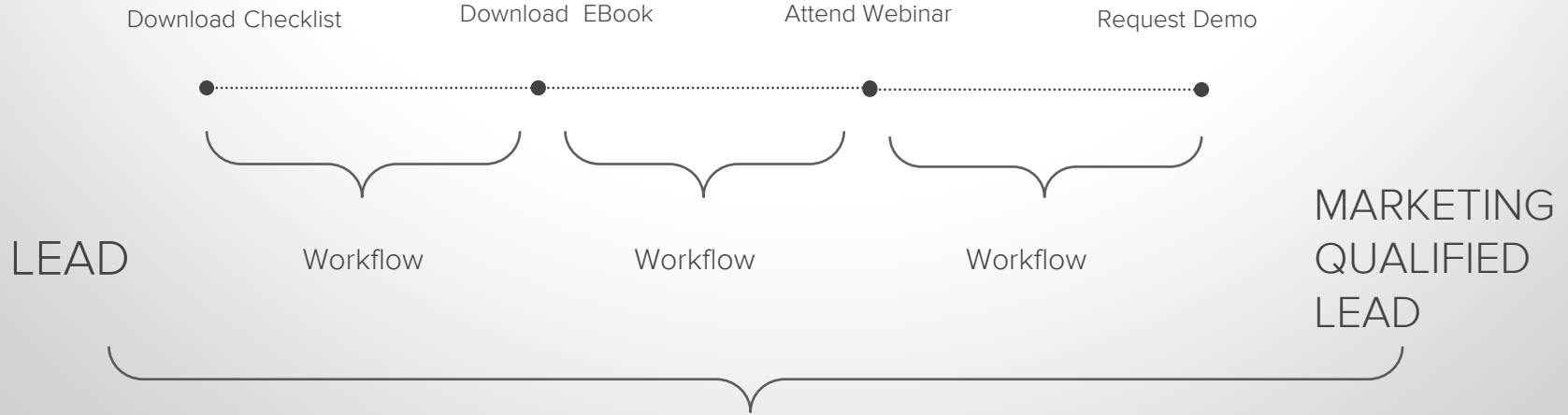
CUSTOMER



SET WORKFLOWS GOALS SPECIFIC TO LIFECYCLE STAGES



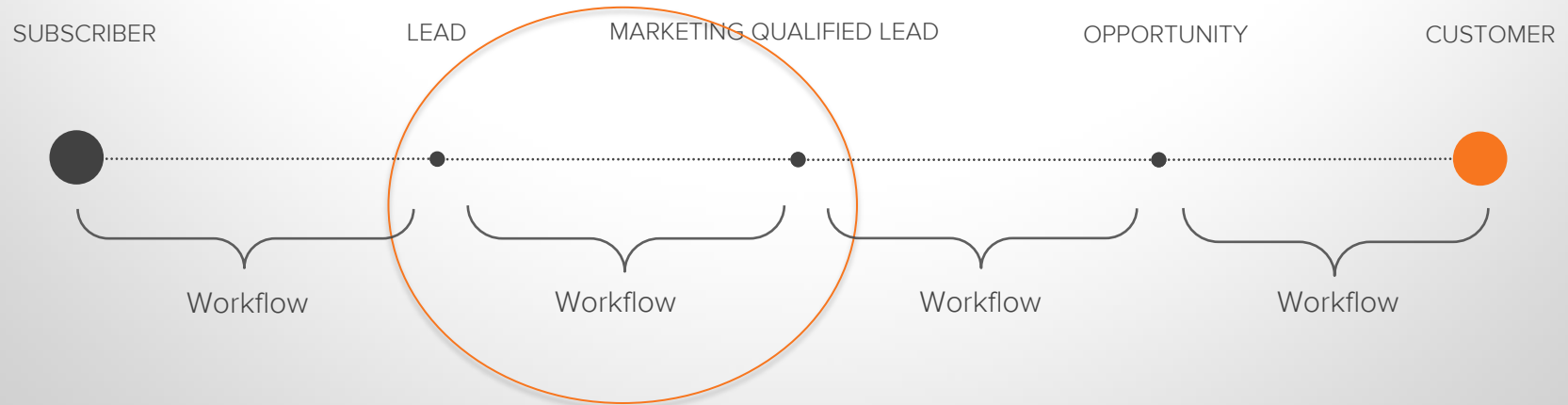
CREATE WORKFLOWS WITH GOALS WITHIN A LIFECYCLE STAGE FOR LONGER SALES CYCLES



EXAMPLE GOALS FOR INDIVIDUAL WORKFLOWS WITHIN A LIFECYCLE STAGE

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

SET WORKFLOWS GOALS SPECIFIC TO LIFECYCLE STAGES



MAPPING OUT WORKFLOW LOGIC VISUALLY

GOAL

Submitted
Form: Request
Demo

LEAD NURTURING WORKFLOW LOGIC BEST PRACTICES



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Choose time delay between emails sent



Identify contacts to suppress from your workflow



IDENTIFY WHICH CONTACTS SHOULD BE ENROLLED IN YOUR WORKFLOW

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

IDENTIFY WHICH CONTACTS SHOULD BE ENROLLED INTO YOUR WORKFLOW

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

MAPPING OUT WORKFLOW LOGIC VISUALLY

Enrollment Criteria

Submitted Form:
Whitepaper XYZ

Goal

Submitted
Form: Request
Demo

LEAD NURTURING WORKFLOW LOGIC BEST PRACTICES



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SELECT APPROPRIATE NUMBER OF EMAILS TO SEND

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

LEAD NURTURING SPECIFIC EMAIL BEST PRACTICES

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

SELECT APPROPRIATE NUMBER OF EMAILS TO SEND

To identify the appropriate number of emails you should send, breakdown the types of emails

- Email Type 1: Goal = Build trust/Conditioning
- Email Type 2: Goal = Additional Downloads
- Email Type 3: Goal = Goal Action
- Email Type 4: Goal = Breakup/Goal Action



Email Type 1: Goal = Build Trust/Conditioning

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



Email Type 2: Goal = Additional Downloads

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



Email Type 3: Goal = Goal Action

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



Email Type 4: Goal = Breakup/Goal Action

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

MAPPING OUT WORKFLOW LOGIC VISUALLY

Enrollment Criteria

Submitted Form:
Whitepaper XYZ

Build Trust

Send
Email

Build Trust

Send
Email

Additional Download

Send
Email

Soft Goal Action

Send
Email

Hard Goal Action

Send
Email

Breakup Goal Action

Send
Email

Goal

Submitted
Form: Request
Demo

LEAD NURTURING WORKFLOW LOGIC BEST PRACTICES



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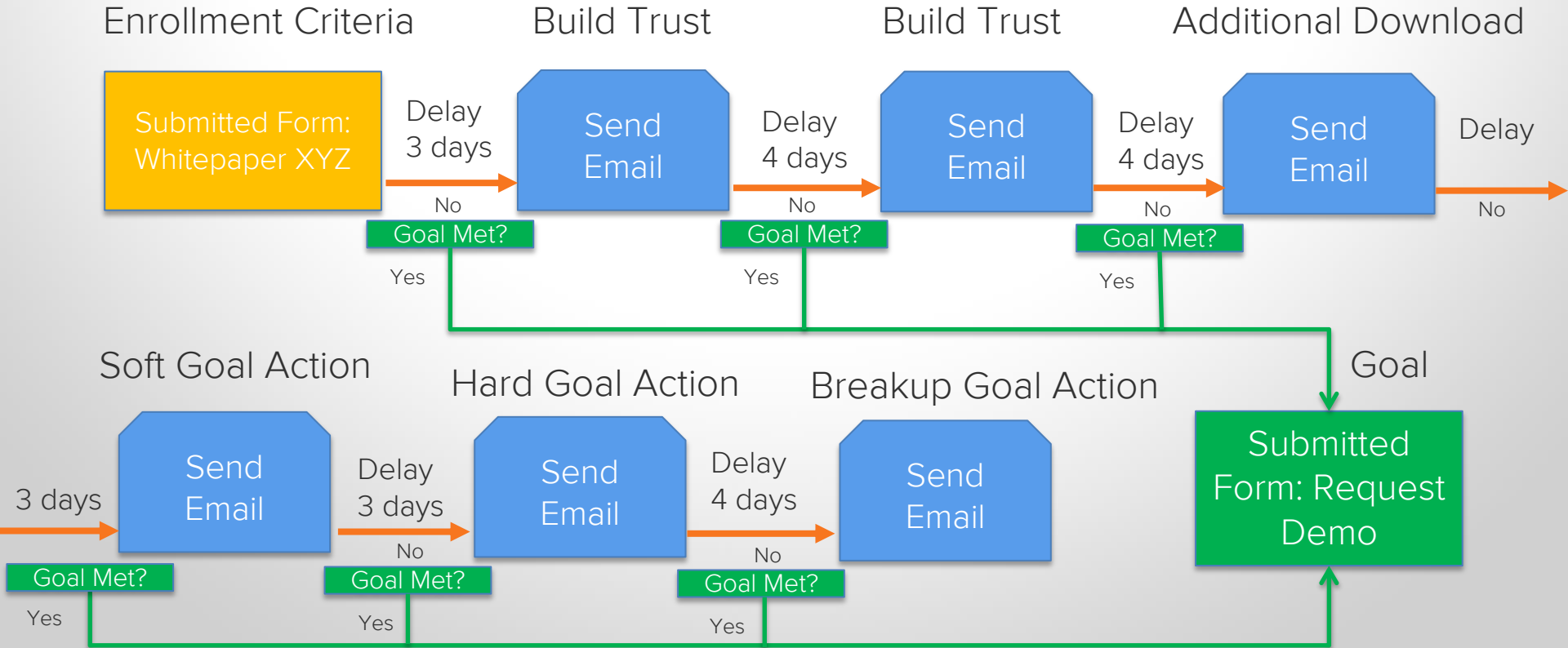
CHOOSE TIME DELAY BETWEEN EMAILS

- Timing is always important when nurturing your leads. You can easily upset people by emailing them too much or too little.
- There is a delicate balance when playing with the timing of your emails, and your best bet is to experiment to figure out what works best.

CHOOSE TIME DELAY BETWEEN EMAILS

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

MAPPING OUT WORKFLOW LOGIC VISUALLY



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IDENTIFY CONTACTS TO SUPPRESS FROM YOUR WORKFLOW

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

IDENTIFY CONTACTS TO SUPPRESS FROM YOUR WORKFLOW

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

LEAD NURTURING WORKFLOW LOGIC BEST PRACTICES



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