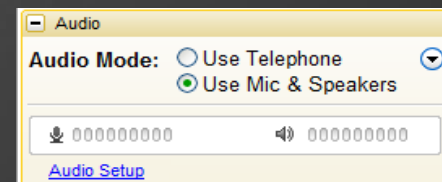


HOW TO CRAFT THE RIGHT INBOUND CAMPAIGN

ADVANCED



We will be starting at 2:00 pm ET.

Use the Question Pane in GoToWebinar to Ask Questions!

1

Use the hashtag #InboundLearning on Twitter

2

Question of the day

#INBOUNDLEARNING



Mark Kilens

@MarkKilens



Jon Gettle

@jongettle



Hadar Duek

@hduek

AGENDA

- 1 What is an inbound campaign
- 2 Why use the inbound campaign approach
- 3 Inbound campaign examples & best practices

1 WHAT IS AN INBOUND CAMPAIGN.

What is an
inbound
campaign?



A photograph of a railway yard with multiple tracks and a concrete structure on the right. The tracks are made of steel rails on wooden sleepers, set on a bed of gravel. A concrete structure with several vertical pillars runs along the right side of the tracks. In the background, there are buildings and a tunnel entrance. The text "Unified cross-channel messaging in support of a goal." is overlaid on the bottom half of the image.

Unified cross-channel messaging in
support of a goal.

Inbound Methodology



HubSpot Campaigns Tool

The screenshot displays the HubSpot dashboard interface. At the top, a dark navigation bar contains the following menu items: Dashboard, Content (with a dropdown arrow), Social (with a dropdown arrow), Contacts (with a dropdown arrow), and Reports (with a dropdown arrow). A search icon is visible on the far right of this bar. The 'Content' dropdown menu is open, listing the following options: Content Home, Design Manager, Landing Pages, Blog, Email, Calls-to-Action, Campaigns (highlighted with an orange border), Calendar, Template Marketplace, and Content Settings.







Below the navigation bar, the main content area features a performance overview section. It includes a header with 'All time' and an 'Add persona' button. A table displays the following metrics:

Metric	Value
Leads	656
Marketing Qualified Contacts	0
Customers	9

Below the table, there is a blue banner with the text: 'Segment your contacts for better targeting — Create a persona'. At the bottom of the overview section, there is a comparison selector showing 'Previous Month' and a 'Set Goals' link.

The bottom of the dashboard shows the start of a 'Marketing Performance' section for the month of October, with a settings gear icon on the right.

What is an inbound campaign?

	4 Keywords	0 Visits	0 Contacts	0 Customers
	3 Landing pages	193 Visits	84 Contacts	0 Customers
	9 Emails	4,255 Sent	974 Opened	145 Visits
	3 Calls-to-action	1,094 CTA views	40 CTA clicks	27 Submissions
	5 Blog posts	204 Views	3 CTA Clicks	1% CTA conversions
	29 Social messages	0 Facebook clicks	8 Twitter clicks	0 LinkedIn clicks

A Note on Inbound Campaigns

Historically people have run ad campaigns or email campaigns, an inbound marketing campaign takes into account the varied way that people learn online and encompasses many channels.

Inbound campaigns are typically content driven, so even if you're ultimately driving someone to a demo of your new product, you want to create content relevant to that product to pull people in.

- Campaign-in-a box Customer Guide

What does unified cross-channel messaging entail?



UNIFIED CROSS-CHANNEL MESSAGING

1. Assets & activities
2. Efforts
3. Behaviors

NOTE: Those entering the campaign via one channel should up at the same place

ASSETS & ACTIVITIES

- Ebooks
- Landing Pages
- Tradeshows
- Webinars

EFFORTS

- Campaign planning meetings
- Mapping out campaign deadlines in calendar

BEHAVIORS

- Networking
- Promoting

2 WHY USE THE INBOUND CAMPAIGN APPROACH?

WHY USE THE INBOUND CAMPAIGN APPROACH?

- 1 Consistent messaging across channels
- 2 Saves you time
- 3 Increase effectiveness & ROI
- 4 Improve your analysis of what worked & why



CONSISTENT MESSAGING ACROSS CHANNELS

SOLUTION AWARENESS







UNVECTORED THRUST

If your goal is to generate leads...

You should not be:

- Blogging about your company's news
- Putting self-promotional videos behind landing pages
- Using press releases to source content offers



2

SAVES YOU TIME



A HubSpot campaign
has a clear process.

HubSpot Campaign Guidance

Define Campaign Details

Define your campaign's goals, target audience, time frame, and add any additional details.



Goals and timeline

Define the goal this campaign is trying to achieve over a specific time frame.



Personas, budget, and notes

Define who this campaign is targeting and add any other details, like budget and internal notes.



Convert Contacts

Create the marketing assets that will help you convert prospects into contacts or contacts into qualified leads.



Target keywords

Target specific keywords with your campaign, so you can get found organically.



Create landing and thank-you pages

In this step you can create the landing and thank you pages that will present a platform for your offer.



Promote Campaign

Drive traffic to your campaign through social media messages, emails, and blog posts.



Create email

Build a marketing email aligned with your landing page so you can promote the offer to your existing contacts.



3

INCREASE EFFECTIVENESS & ROI

**Increase the
surface area of
your message.**



4

ANALYZE WHAT WORKED & WHY



4

Keywords

0

Visits

0

Contacts

0

Customers

0

Customers



3

Landing pages

193

Visits

84

Contacts

0

Customers



9

Emails

4,255

Sent

974

Opened

145

Visits



3

Calls-to-action

1,094

CTA views

40

CTA clicks

27

Submissions



5

Blog posts

204

Views

3

CTA Clicks

1%

CTA conversions



29

Social messages

0

Facebook clicks

8

Twitter clicks

0

LinkedIn clicks

Visits

Contacts

Customers

121

79

0

48

5

0



Last 3 months



50

46

25

0

Aug

82

Sep
paid 34

Sep

16

Oct

■ All Sources

■ Organic Search

■ Referrals

■ Social Media

■ Email Marketing

■ Paid Search

■ Direct Traffic

■ Other Campaigns

■ Offline Sources

A photograph of a small-scale rocket launch experiment. A clear plastic bottle is partially filled with white foam and sits on a concrete surface. A black paper cone is attached to the top of the bottle, secured with a black rubber band. A long, dark shadow is cast from the bottle and cone onto the concrete to the right, indicating a low sun position. A dark semi-transparent banner is overlaid at the bottom of the image, containing white text.

How will you know what worked for a persona, if you don't experiment with everything?

3 INBOUND CAMPAIGN EXAMPLES & BEST PRACTICES.



INBOUND CAMPAIGN EXAMPLE: TRADESHOW CAMPAIGN



Training, Development and Coaching for Healthcare Interpreters

Providers of training, development, and coaching for
healthcare interpreters.

www.interpreterdevelopment.com

The goals:

- Lead generation
- Brand trust
- Networking

CAMPAIGN OVERVIEW

- ✓ Newsletter and educational material sign-up at conference booth
- ✓ Hands-on trial event at conference with “join from home” opportunity
- ✓ Pre-conference emails to drive attendance
- ✓ Post- conference emails to nurture booth visitors and event participants
- ✓ Promotion via site, blog and social

ASSETS & ACTIVITIES



Training, Development and Coaching for Healthcare Interpreters

Come Grow with Us!



Subscribe to Newsletter, Receive E-Handouts & Enter to WIN!

First Name *

Last Name *

Email Address *

[Email Me!](#)

ASSETS & ACTIVITIES



Training, Development and Coaching for Healthcare Interpreters

Skeptical about online classes?

Fear not!

We don't want you to wonder what it's like to be a student in our continuing education courses. We want to show you!

Join us on **March 21, 2014 at 7:30 PM (Central)** for this **hands-on session** and experience an **easy, fun, and interactive** online learning trial the Connecting Cultures way!

This is a **no-cost, risk-free opportunity** to participate in something great! Come on, check out our classroom and Try It Out!

- See what it's like to be a Connecting Cultures student
- Get your hands dirty with fun, interactive tools and features
- Meet our amazing instructors and see them in action
- Most importantly, discover how online learning can help you be a better interpreter.



How will you join the demo? *

- I'll be at the 2014 CHIA Conference. Can't wait to meet you and "Try It Out!"
- I'll be joining you from my couch!
- Sorry I can't make it. Please contact me so I can "Try It Out" a different day.

[Register me!](#)

TAGGING LANDING PAGES

Content Options Style Publishing

Campaign

CHIA 2014 Conference x Add new...

meta description

Head Section HTML


Add raw HTML snippets, embed codes, or tracking javascripts, that will be added within the <head> tag on the page.

Footer Section HTML

Add raw HTML snippets, embed codes, or tracking javascripts, that will be added right before the </body> tag on the page.

Password Protect Page


Specify a password customers will need to view your page



CONNECTING CULTURES

Training, Development and Coaching for Healthcare Interpreters

Come Grow with Us!



Subscribe to Newsletter, Receive E-Handouts & Enter to WIN!

First Name *

Last Name *

Email Address *

Email Me!

THE EFFORTS



HUBSPOT CALENDAR TOOL

The screenshot shows the HubSpot dashboard interface. At the top, there is a navigation bar with tabs for 'Dashboard', 'Content', 'Social', 'Contacts', and 'Reports'. A search bar is located on the right side of the navigation bar. The 'Content' menu is open, showing a list of options: 'Content Home', 'Design Manager', 'Landing Pages', 'Blog', 'Email', 'Calls-to-Action', 'Campaigns', 'Calendar' (highlighted with a red box), 'Template Marketplace', and 'Content Settings'. The main content area displays a table with columns for 'Leads', 'Marketing Qualified Contacts', and 'Customers'. The values are 659, 0, and 9 respectively. A blue banner below the table reads 'Segment your contacts for better targeting — Create a persona'. The sidebar on the right lists various resources: 'Resources', 'Academy Home', 'Training', 'Certifications', 'Marketing Library', 'Forums', 'Ideas', 'HubSpot Partner Directory', and 'Support'.

Leads	Marketing Qualified Contacts	Customers
659	0	9

HUBSPOT CALENDAR TOOL

The screenshot displays the HubSpot Calendar Tool interface. At the top left, there is a calendar for July 2014. Below the calendar is a 'Filter By' section with several checked options: Content, Blog, Email, Recurring Email, Landing Page, Social, and Task. A 'Campaign' dropdown menu is highlighted with an orange border, showing options: 'No Campaign Associated', 'CHIA 2014 Conference', 'Course: Fighting Mental Decay', and 'Course: How May I Help You?'. The main area shows a 'Create a custom task' modal form with fields for Title, Select a date, Select a time, Select an Assignee, and Select a Campaign (highlighted with an orange border). Below these fields is a 'Notes' text area. At the bottom of the modal, there is a 'Create Task' button and a message: 'No worries, we'll notify the assignee for you'.

July < >

Su Mo Tu We Th Fr Sa

29 30 1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28 29 30 31 1 2

3 4 5 6 7 8 9

Filter By

Content

- Blog
- Email
- Recurring Email
- Landing Page
- Social
- Task

Campaign [edit](#)

- No Campaign Associated ✕
- CHIA 2014 Conference ✕
- Course: Fighting Mental Decay
- Course: How May I Help You? ✕

Today < > July 2014 Day Week Month List

Create a custom task ✕

Title

Select a date Select a time

Select an Assignee

Select a Campaign

Notes

Create Task No worries, we'll notify the assignee for you

BEHAVIORS - NETWORKING





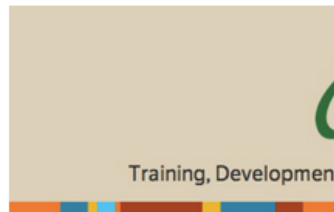
PRO TIPS.

When networking, identify other members of your industry that have shared interests.

They'll have similar incentives to your own

Attract a similar audience and achieve the same goals.

BEHAVIORS – EMAIL PROMOTION



Hello, CONTACT.FIRSTNAME!

Do any of these statements sound familiar?

"I've never taken an online class."

"I've participated in webinars. I don't want to talk about the topic. Some of my colleagues are afraid to."

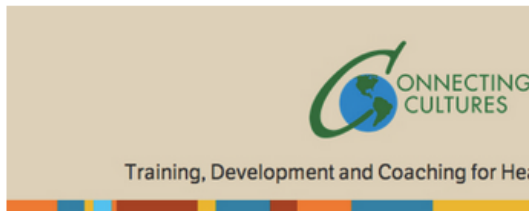
"Online classes intimidate me."

"I don't know anything about continuing education."

"I doubt online classes will help me."

Fear not! None of these have to be true. You can experience an easy, fun, interactive way of learning the Connecting Cultures way.

We invite you to join us on March 21, 2014. We will give you a live tour of our online classes.



Final Call for *Try It Out!* live from CHIA 2014

We don't want you to wonder what it's like to be a student in our continuing education courses. We want to show you!

Join us on **March 21, 2014 at 7:30 PM (CDT)** for a hands-on session and experience an easy, fun, and interactive online learning the Connecting Cultures way! This is a no-cost, risk-free opportunity to participate in something great! Come, check out our classroom, and

Hi CONTACT.FIRSTNAME!

Have you heard? The **California Association's 14th Annual Conference** will take place this week March 21-22, 2014.

We are excited to highlight the new edition of our newsletter!

This edition features an article by a healthcare interpreter who will be sharing their experience at the conference. If you will be attending, we welcome you to enjoy a wonderful session available in your plane, train or automobile. There are many opportunities that await you!

Can't make it to CHIA 2014? Don't miss out completely. Enjoy the conference through our contributors, and [discover how you can attend the](#)



Hello, CONTACT.FIRSTNAME!

Thank you for registering to attend *Try It Out!* on March 21, 2014.

Here's a bit of information to help you get set for the interactive session:

Before the session –

Please verify your browser's compatibility by joining a "test session" anytime before the scheduled session.

To do so, access <http://www.webex.com/test-meeting.html>. Provide the requested information (name and email) and click JOIN. The system will run the necessary functions. This will also prepare your computer and save time when joining the scheduled session.

To join the session –

Check your email inbox for an email from messenger@webex.com with subject line "You are registered for the training session: Try It Out! - Live from CHIA 2014." This email has all the information you need to connect to the session.

TAGGING EMAILS

← Email Tutorial Need Help

Content **Options** **Sending** Create A/B Test

Basic Information

Name
Internal name used for organization

TEST

From Name Personalize Sender
The name recipients will see.

Select an Option Add new... Manage...

From Email Address
The address recipients will see and reply to.

Select an Option Add new... Manage...

Campaign
Used to group multiple pieces of content for analysis across a single marketing effort.

Select a Campaign Add new...

Email Type
Select the type of email you want to send.
Your contacts will only receive the email types they've subscribed to. [Help](#)


Select an Option Manage...

Email Footer
Choose the office location information that will appear in the footer of this email.

Default Manage...

BEHAVIORS- PROMOTION (BANNER)

Register Now



DON'T MISS THIS OPPORTUNITY!



Join this **RISK-FREE, NO OBLIGATION, LIVE DEMO** of Connecting Cultures continuing education courses for medical interpreters.

- Experience our engaging, interactive and fun courses!
- Discover how online learning can help you be a better interpreter!

SPACE IS LIMITED, REGISTER NOW!

DON'T MISS THIS OPPORTUNITY!



Join this **RISK-FREE, NO OBLIGATION, LIVE DEMO** of Connecting Cultures continuing education courses for medical interpreters.

- Experience our engaging, interactive and fun courses!
- Discover how online learning can help you be a better interpreter!

SPACE IS LIMITED, REGISTER NOW!

TAGGING CTAs

Edit CTA: New Call-to-Action

Information Design

Name ⓘ
New Call-to-Action

Campaign
CHIA 2014 Conference x Add new...

Link to
Web Address ▾

Link URL
<http://info.interpreterdevelopment.com/free-online-learning>

Open in new window

DON'T MISS THIS OPPORTUNITY!

Try It Out!
"live"

Join this **RISK-FREE, NO OBLIGATION, LIVE DEMO** of Connecting Cultures continuing education courses for medical interpreters.

- Experience our engaging, **W** interactive and fun courses!

96px

Update CTA

BEHAVIORS - SOCIAL PROMOTION



Connecting Cultures

Published by Erin Rosales at 10:01 AM CDT, Mar 6 2014 via the HubSpot Chrome extension.

Going to @CHIAinterpreter conf? Catch live presentation on interpreting in ER w @robersoncyacom! #1nt sneak peak: <http://hub.am/1cyKrqd>



Connecting Cultures

Published by Erin Rosales at 3:53 PM CDT, Mar 13 2014 via HubSpot Web.

Medical interpreters, skeptical of online classes? Fear not! Demo our online classroom. Limited spots, must register! <http://hub.am/1cVY99c>



Connecting Cultures Inc.

Published by Erin Rosales at 3:55 PM CDT, Mar 17 2014.

Going to CHIA's 14th Annual Education Conference in Sacramento, CA March 21-22? Don't miss the "Interpreting for Children and Parents" workshop with Juan Gutiérrez Sanín and Alvaro Vergara Mery!

Here's a sneak peak: <http://hub.am/1g3pIT0>



Connecting Cultures

Published by Erin Rosales at 8:03 PM CDT, Mar 22 2014 via HubSpot Web.

Thanks to all attendees who stopped by our booth at the California Healthcare Interpreting Association's 2014 conference! Safe travels home!

TAGGING SOCIAL MEDIA MESSAGES

The image shows a social media scheduling interface. At the top, there are navigation icons for Twitter, Facebook, LinkedIn, Google+, and X. A "User Guide" link is visible in the top right. The main content area displays a tweet by Hadar Duek (@hduek) with the text "What do you want to say to your beloved followers?". Below the tweet, there are options to schedule it for "Tomorrow at 11:07 AM EDT", attach files, and delete. There are also buttons for "Schedule another tweet" and social sharing icons for Facebook, LinkedIn, Google+, and X. At the bottom, a "Select campa..." dropdown menu and a "New" button are highlighted with an orange border. A "Schedule" button is located in the bottom right corner.

Twitter f in g+ X User Guide

Hadar Duek @hduek

What do you want to say to your beloved followers?

Edit

Tomorrow at 11:07 AM EDT Attach 140


Schedule another tweet or f in g+ X

Select campa... New Schedule

A close-up, low-angle shot of a desk in a dimly lit room. In the foreground, a calendar is spread out, showing dates like 24, 25, 26, 31, and 1. A dark-colored pen lies diagonally across the calendar. To the right, a clear glass filled with water sits on the desk. In the background, a laptop is open, its screen displaying some text. The lighting is warm and soft, creating a focused and quiet atmosphere.



“He who fails to plan is planning to fail”
- Winston Churchill

RESULTS - OVERVIEW OF TAGGED ITEMS

	4 Keywords	0 Visits	0 Contacts	0 Customers
---	----------------------	--------------------	----------------------	-----------------------

542 / 250
Visits

89 / 75
Contacts

	3 Calls-to-action	1,094 CTA views	40 CTA clicks	27 Submissions
	5 Blog posts	204 Views	3 CTA Clicks	1% CTA conversions
	29 Social messages	0 Facebook clicks	8 Twitter clicks	0 LinkedIn clicks



Flickr User: Tom Hart

“What advice would you give other marketers to conduct a successful multi-channel campaign?”

2

**INBOUND CAMPAIGN EXAMPLE:
INDUSTRY SURVEY**



Providers of digital marketing solutions for the
non-profit industry.

www.productionsolutions.com

The goals:

- Lead generation
- Thought-leadership
- Customer delight

CAMPAIGN OVERVIEW

- ✓ Create a survey that will provide insight into your industry
- ✓ Communicate with your contacts about your survey
- ✓ Coordinate with other industry members to encourage submissions
- ✓ Create press releases and blog posts about your survey results to promote a content offer
- ✓ Promotion via site, blog and social, aim for distribution by other authorities in your industry

ASSETS & ACTIVITIES

*1. Please tell us a bit about you and your organisation

Name:

Organisation

*2. What is your job title?



3. What is your role?

- Elected representative
- Appointed representative
- CEO/Director Level
- Middle Management
- Front Line Service Delivery
- Back Office Support Services

Other (please specify)

ASSETS & ACTIVITIES

Infographic: 2013 State of Employment for Nonprofit Organizations

A new survey of more than 250 nonprofit executives reveals employment trends and challenges in the fundraising and nonprofit marketing arenas. The first annual 2013 **The State of Employment for Nonprofit Organizations** survey was conducted by Production Solutions and PS Digital, in partnership with *FundRaising Success* magazine. The results have been summarized in a simple infographic that appears in the October issue of the *FundRaising Success* magazine and on a special website: [Click here to download the infographic.](#)

While nonprofit executives cite budget constraints and an inability to find qualified candidates as the biggest challenges in hiring team members, other responses reflect that 66.5% of respondents work for organizations that do not offer a formal training program for new hires once they are on board.



[CLICK TO DOWNLOAD](#)

BEHAVIORS – OUTREACH & PROMOTION



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FundRaising Success

@FRSuccess



[+ Follow](#)

#Fundraisers, take this
@FRSuccess/@ProdSolutions survey:
State of Employment in the **#Nonprofit**
Sector surveymonkey.com/s/NonprofitEmp

... ..

[Reply](#) [Retweet](#) [Favorite](#) [More](#)

BEHAVIORS



[Do you have a S.W.A.T. Team Behind You?](#)

George pays tribute to the best "secret operatives" that have your back in the workplace.

[Find out who, or what Greg has "hooked" in his blog this week...](#)



[See What Everyone Is Talking About: The 2013 State of Employment for Nonprofit Organizations Survey Results](#)

"Production Solutions and *FundRaising Success* magazine released their 2013 State of Employment for Nonprofit Organizations. The study's findings should be taken both as an alarm and as a call to action." - Roger Craver, *The Agitator**

Did you miss the [2013 State of Employment for Nonprofit Organizations](#) survey results infographic?

Click here to [download it now.](#)

*from *The Fundraising Talent Puddle*, 10/18/2013



[CLICK TO DOWNLOAD](#)

BEHAVIORS



Outrageous Hope

By Margaret Battistelli

About Margaret

*Margaret's life in six words:
Bountiful blessings, glorious
chaos ... glitter included.*

Margaret has been with *FundRaising Success* since its inception in 2003. Before joining the magazine as its founding editor, she was an editor and writer for America Online; published *PhillyFeast*, a monthly magazine about food in and around Philadelphia; and held chief editor positions at a variety of newspapers and magazines in the Philadelphia area. She is a graduate of Temple University in

2013 State of Employment for Nonprofit Organizations Report

By Margaret Battistelli Gardner | Posted on October 23, 2013



Leave a comment



0



0

Text Size - + | Print

It probably wouldn't come as a shock for any of you to hear that nonprofits are strapped for cash, and that everyone is struggling to one extent or another.

FundRaising Success recently partnered with [Production Solutions](#) and [PS Digital](#) to survey the sector in an effort to shed light on employment trends and challenges in the fundraising and nonprofit marketing arenas. The result was the first annual [2013 State of Employment for Nonprofit Organizations Report](#). (You can download the results and an infographic [here](#).)

BEHAVIORS

This week Production Solutions and *Fundraising Success Magazine* released their [2013 State of Employment for Nonprofit Organizations](#).

The study's findings should be taken both as an alarm and as a call to action. Of the 250 organizations surveyed:

- 79.9 % face budget constraints that prevent them from hiring the experienced talent needed to complete their fundraising team;
- 54% simply can't find qualified candidates;
- 47.9% can't offer competitive salaries.

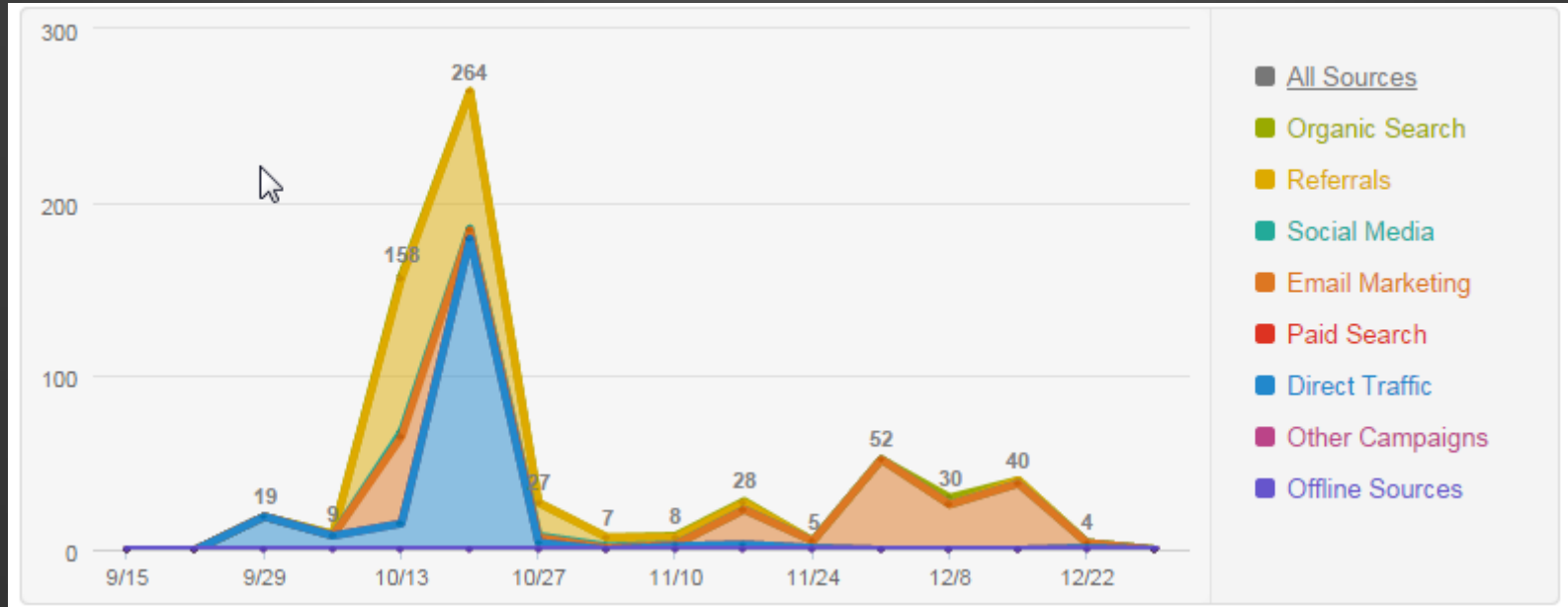
Most shocking of all — 66.5% offer no formal fundraising training programs.

Fortunately, 40% of the respondents have begun thinking outside the box — breaking down silos, restructuring, outsourcing — in an effort to solve their staffing problems. [[Download the Infographic here.](#)]

- 62.6% are now outsourcing work to outside contractors;
- 70% offer flexible time solutions;
- 50% offer telecommuting opportunities.

At best these are temporary, band-aid 'fixes', not solutions.

RESULTS



697

views

291

submissions

196

new contacts

13

customers



PRO TIPS.

To track the performance of a landing page from an outside source such as a billboard, QR Code, or tradeshow:

Use a tracking URL with your campaign to separate out the visits and leads coming from that source.



INBOUND CAMPAIGN EXAMPLE: WEBINAR CAMPAIGN



Providers of a bank product platform built for tax preparers.

www.refundo.com

The goals:

- Lead generation
- Lead nurturing
- Education

CAMPAIGN OVERVIEW

- ☑ Plan a webinar meant to educate prospects, leads, or customers
- ☑ Promote your webinar using all digital channels
- ☑ Coordinate a presenter, and the presentation slides
- ☑ Continue to market the results and key takeaways from the webinar

ASSETS & ACTIVITIES



FREE WEBINAR:

5 Ways to Keep Your Clients Engaged After Tax Season

Duration: 20 minutes

Date and Time: Wednesday April 9th, 2014 at 1pm ET / 10am PST



REGISTER HERE:

First Name *

Last Name *

Email *

Company Name *

Phone Number *

Subscribe to the Refundo Blog

Automatically Subscribe to the Refundo Webinar Series

SAVE MY SEAT

ASSETS & ACTIVITIES

REFUNDO NOW

The Consumer-Friendly Refund Anticipation Loan Alternative

Watch our 30 minute interactive webinar where we introduce our latest product, Refundo NOW.

After watching this webinar you will understand:

- Who is eligible to offer this new product
- How to present this product to your clients
- Program rules and timeline

We were able to answer as many questions as possible during our live Q&A session right after the presentation. If you have any additional questions or comments contact us via email at sales@refundo.com or join the conversation on Twitter at [#taxprotalk](https://twitter.com/taxprotalk).

Complete form to access recording.

REGISTER HERE:

First name *

Last name *

Email address *

(Privacy Policy)

ASSETS & ACTIVITIES

DON'T JUST BE AN ERO...
BE A **HERO**

JOIN OUR WEEKLY WEBINAR TO FIND OUT!



**6 TECH TOOLS EVERY
TAX PROFESSIONAL
SHOULD HAVE**



Download Now

FREE WEBINAR:
*5 Ways to Keep Your
Clients Engaged After
Tax Season*

>> REGISTER <<



**5 WAYS TO KEEP YOUR CLIENTS ENGAGED
AFTER TAX SEASON**

Tax industry experts best practices, ways to expand your revenue and more!

WATCH FREE WEBINAR NOW

BEHAVIORS – EMAIL PROMOTION



Dear Customer,

We're excited to continue the 2014 Refundo Webinar Series.

There's still time to register to join today's free webinar, "**Benefits and Steps to Offering Tax Education**", where we will discuss on how to grow your business by offering tax education. The guest speaker will be Carlos Lopez of [Latino Tax Professionals Association](#), an industry expert in Tax Education with over 30 years of experience.

Our experts will hold a live Q&A session at the end of the webinar, a conversation and ask questions on Twitter using [#taxprotalk](#).

Webinar Details:

- Time: Wednesday, April 23rd @ 1:00 pm EDT/ 1:00 am PDT
- Registration: Limited and on a first come, first served basis. Register now!

[REGISTER](#)

Did you miss our first webinar? No worries! We recorded it. Watch [here!](#)

See you there!



Hi Customer,

Thank you for attending our webinar - **5 Mistakes Tax Pros Make**.

I hope you enjoyed chatting with Roger and me, as we discussed best practices on how to improve your tax preparation to avoid common mistakes.

Check-out the slides and resources from the webinar:

- [Webinar Slides](#)
- [Free checklist: Tech Tools for Tax Pros](#)

If you were unable to ask questions during the live webinar, you can ask questions on Twitter using our hashtag: [#taxprotalk](#).

Talk soon,

Sharon Bennett

Training & Development, Refundo

[@SharonPBennett](#)



Dear Customer,

On April 9th, Refundo will be launching its 2014 Webinar Series for Tax Professionals ("2014 Webinar Series"). These webinars offer useful and actionable advice on how to engage clients, build relationships and loyalty, gain a winning edge over the competition, and sustain a healthy, profitable, and growing tax business.

We invite you to join our first open webinar, "**Top 5 Ways to Keep Clients Engaged After Tax Season**", where we will share and discuss best practices that can help tax offices maintain active relationships with clients even after the tax season is over. This will include a live Q&A with our experts.

Webinar Details:

- Time: Wednesday, April 9th @ 1:00 pm EDT/ 10:00 am PDT
- Registration: Limited to 10 participants on a first come, first served basis. Click below to register now.

[REGISTER](#)

Join the conversation and ask questions at [#taxprotalk](#). See you there!

Sharon Bennett

Training & Development, Refundo

[@SharonPBennett](#)

BEHAVIORS - BLOGGING

REFUNDO NOW OFFERS LENDUP LOANS IN MISSISSIPPI

Posted by [Michael De Senna](#)

Do you live in Mississippi? Are your customers stuck in a never-ending payday loan cycle?

If so, we have good news for you!

Starting this week, you can offer responsible loans to clients who are residents of Mississippi. It takes just 5 minutes to fill out an application in Refundo Dashboard, and your clients can receive their funds in as little as 15 minutes. [Click here to learn how to offer a loan with Refundo.](#)

Also, in case you haven't heard, we're offering a special promotion to eligible tax preparers. If your client is approved and proceeds with the loan, you'll get paid \$10 AND a \$5 charitable donation will be made in your name to the 1:1 Fund, a non-profit organization that supports the college dreams of low-income children.

For more information about our promotion, e-mail us at loans@refundo.com. And to learn more about the 1:1 Fund, [click here](#). Thanks and enjoy the rest of your week!


5 WAYS TO KEEP YOUR CLIENTS ENGAGED

SUBSCRIBE TO EMAIL UPDATES

First Name *

Email *

Subscribe



DON'T JUST BE AN ERO...
BE A HERO
JOIN OUR WEEKLY WEBINAR TO FIND OUT!

Creating blog content that appeals to the persona you are targeting for the webinar...



Leads to high CTA conversions from those blog posts.



Blog Post Name	Views	CTA Clicks	CTA conversions
Advent ERO's can now become HERO's	170	50	14%
It's Trade show time at Refundo!	114	39	15%
Introducing the 2014 Webinar Series for Tax Professionals	91	30	13%
Refundo Now Offers LendUp Loans in Mississippi	87	20	11%
What are Tax Refund Bank Products?	97	19	10%
Top 10 Questions to Ask When Choosing a Bank Product Provider	107	19	9%



PRO TIPS.

Repurpose content wherever you can.


A content piece can be leveraged as webinar material, broken down into blog posts, or could be used in social media messages.

BEHAVIORS- PROMOTION (SOCIAL)

 **refundo**
@refundo Follow


Don't miss our CEO Roger Chinchilla introduce our ex
NOW. Register
[#taxprotalk](#) [#tax](#)

Reply Retweet Favorite


 **refundo**
@refundo Follow

"Advent ERO's
Learn more here
[#taxprotalk](#) [#erc](#)

Reply Retweet Favorite

 **Refundo**
April 17 · Like Page

Check out our latest blog post on our Apr 23rd free webinar: "Why Offer Tax Training?" <http://hub.am/1itpCPB>
[#taxprotalk](#)

 **THE REFUNDO WEBINAR SERIES CONTINUES**
Learn why you should be offering tax training in your practice, and tips to help you get started
[HTTP://BLOG.REFUNDO.COM/THE-REFUNDO-WEBINAR-S...](http://blog.refundo.com/the-refundo-webinar-s...)

Like · Comment · Share

RESULTS

2,067
Visits

51
Contacts

9
Customers



3
Keywords

0
Visits

0
Contacts

0
Customers



20
Landing pages

977
Visits

44
Contacts

9
Customers



12
Emails

4,049
Sent

1,200
Opened

98
Visits



22
Calls-to-action

11,995
CTA views

1,028
CTA clicks

290
Submissions



24
Blog posts

991
Views

198
CTA Clicks

10%
CTA conversions

INBOUND CAMPAIGN BEST PRACTICES

- Assign a campaign Directly Responsible Individual (DRI)
- Identify the campaign's success metrics and goals
- Set aside time in your HubSpot Calendar to work on campaign-related action items
- Send calendar invites to project participants to remind them of deadlines & tasks

INBOUND CAMPAIGN BEST PRACTICES

- Be clear on assignments, deadlines and consequences
- Repurpose existing content to save time, if possible
- Prepare a management brief to gain buy-in early and to avoid late-stage shifts in execution or goals
- Identify approval process & timelines in advance to allow for a proper execution timetable

NEXT STEPS

1. Create an inbound campaign centered around a content offer.
2. Map out your campaign using the Campaign app
3. Assign campaign tasks using the Calendar app.
4. Identify an industry partner to collaborate with on your next inbound campaign.

RESOURCES

- [How to run an inbound campaign](#)
- [How to create a campaign](#)
- [What Is Multi-Channel Marketing? \[FAQs\]](#)

QUESTIONS?



THANK YOU.