HOW TO RUN AN INBOUND MARKETING CAMPAIGN

HubSpot

CHAPTER ONE

ESTABLISH YOUR CAMPAIGN AND OFFER

As inbound marketers, we're constantly creating and promoting content to attract prospective customers. In the midst of that ongoing work however, sometimes it also makes sense to run a concentrated inbound marketing campaign.

What is an inbound marketing campaign?

A campaign is a special kind of marketing push. It aligns every one of your marketing channels and all of your content around a single goal and message. Typically campaigns run for a shorter, concentrated period of time like 4-6 weeks and have a clear end goal.

When would you run a concentrated campaign?

You'll want to run a campaign on a specific topic and for a specific reason. The idea here is that you're shining a spotlight on one aspect of what you do, so it should be specific, time-boxed and measurable. Here are a few good reasons to run a campaign:

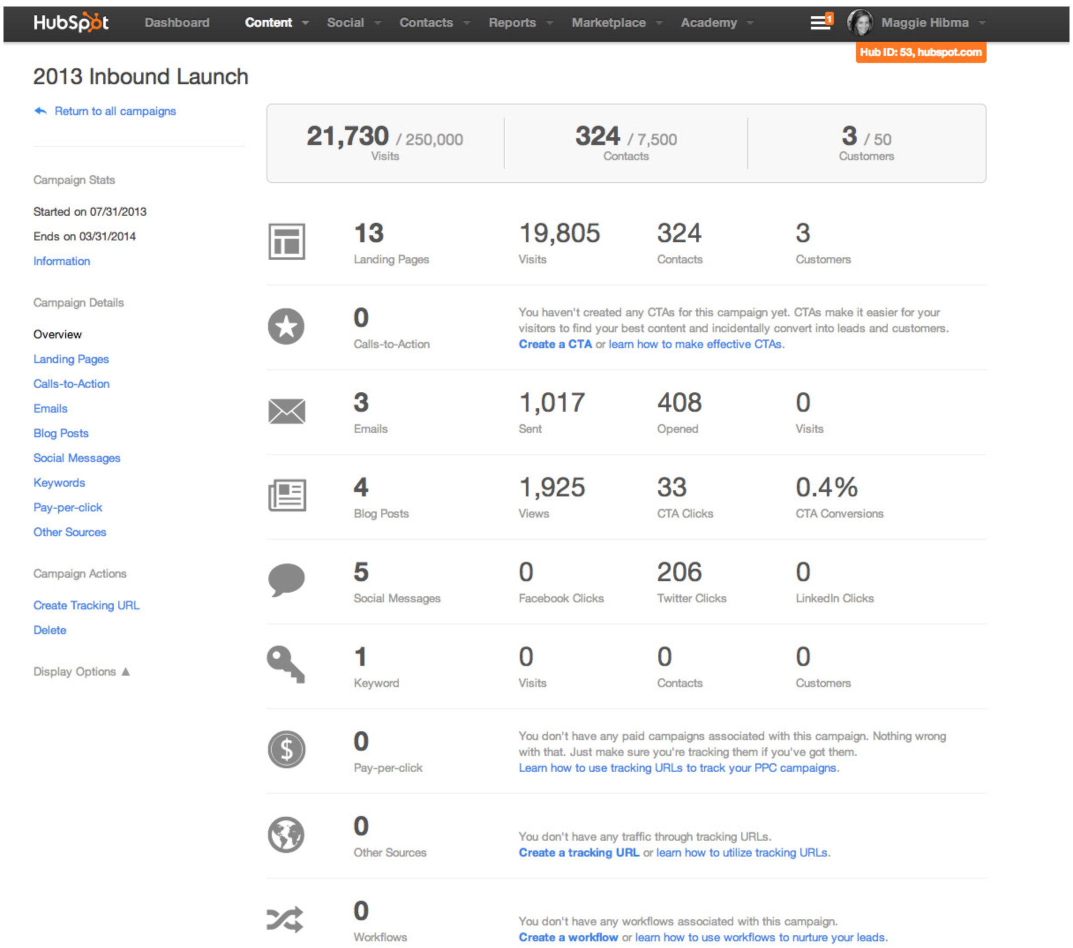
- You are launching a new product or message platform
- You want to establish expertise on a particular subject (and rank well for it in search).
- You are trying to persuade or change public opinion.

Why is an inbound marketing campaign different?

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

First - Get to Know the HubSpot Campaigns App

Throughout this guide, we'll be walking you through how to build a campaign in HubSpot using various tools in HubSpot. An easy way to organize your work in the tool is to start in the new HubSpot Campaigns app, a tool that helps you organize the many pieces of your campaign, and track the results of your efforts. Here is what it looks like:



VISIT THE CAMPAIGNS APP

Before you start creating an inbound marketing campaign, there are a few preliminary steps you must take. In addition to the idea that you have, you need to consider your audience, your goals, and the channels you are going to use.

Let's walk through how to plan, execute and measure your next inbound marketing campaign in one place using your HubSpot platform.

Task 1: Decide on your campaign goals, focus and audience.

Set Benchmarks/Goals

First, document the goal for your campaign. What are you trying to achieve? Because this is a concentrated campaign it should pair your typical goals of leads, followers or traffic to the topic you're looking to influence people on. Goals should also be specific, measurable, attainable, relevant and time bound. For example:

Generate [number] leads focused on [topic/product] by [date]

Here's are a few examples of HubSpot's goals from a recent product launch. The product we were launching was Social Inbox, a social monitoring and publishing tool. So we wanted to generate a ton of activity around the topic of social media to establish our expertise and pull in a specific type of lead.

- "Generate 5000 leads who are interested in social media marketing by June 30, 2013."
- "Improve rank for the keyword "social monitoring" from 5th to 2nd on Google by June 30, 2013."

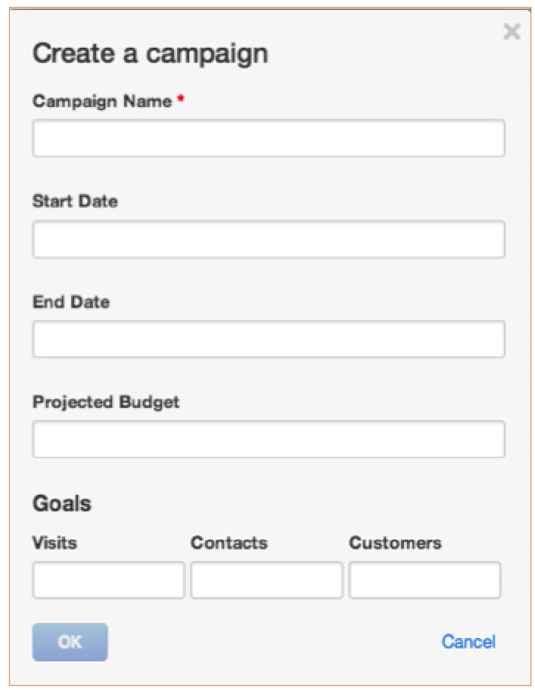
You'll note that the goals for our concentrated campaign are specifically tied to in social media - the topic that relates to our product launch.

RESOURCE

Here's a worksheet for determining your own goals in HubSpot.

Hooray! Let's do this now

Once you have your goals, go to the Campaigns report in HubSpot to start your campaign. Create a new campaign. Give it a name. Then choose your campaign timeline and goals. The next page will allow you to pick the channels you want to include in the campaign.



Identify your Campaign Audience

Before you choose your channels, take a step back and think of your audience. Your campaign audience may be your main company persona or be a subset of your audience. Don't have a buyer persona created for your company? There's a guide below to creating them.

Buyer personas are semi-fictional representations of your ideal customer based on real data and some select educated speculation about customer demographics, behavior patterns, motivations, and goals. By understanding this information about your audience, you can create better campaigns that are targeted toward them.

Sample Buyer Persona:

By creating campaign personas, you will have a better understanding of your audience. Personas allow you to put yourself in your audience's shoes to really have a better idea of how they think and make decisions.

If you have more than one buyer persona, consider who you want to target and how you want to target them. Based on the information you gathered as you created your buyer personas, think about what channels will really grab their attention. Are they always on their laptops, phones, and tablets checking email? Or do they check their social streams religiously throughout the day? Finding out this information will be important later on while you are deciding what channels to focus heavily on. Note that you should still have a fully integrated campaign using multiple channels, but it is important to focus more on the channels you know your buyer personas are using.

Task 2: Create an Inbound Campaign Offer and Landing Page

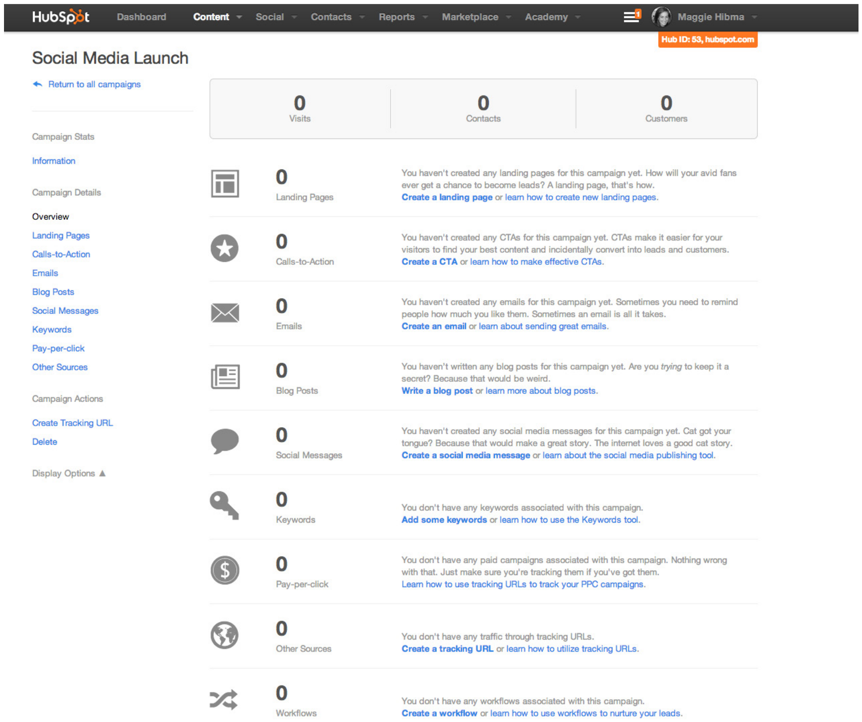
At the center of your whole campaign is an "offer" or series or related offers. Despite how it sounds, an offer isn't actually a discount or sale price, it's a piece of content that educates your audience about a given topic. It is the first conversion point in your campaign and the entry point to becoming a lead. Your offer could be an ebook, webinar, white paper, templates, or even a visual presentation. The offer will live on a landing page which you can build in HubSpot.

After you select a topic for your offer, outline the content. Think about the most important points you want to hit upon in the offer. These points will make up the chapters or sections of your offer. If you've got multiple offers, think about using similar messaging in them to make them a cohesive collection. Additionally, since this is a content offer, you'll want to include some CTAs to drive readers to a deeper conversion with your company, like a demo or call with your sales team.

Creating a landing page for your offer is so important, we decided to dedicate the entire next section of this guide to explaining how to create one.

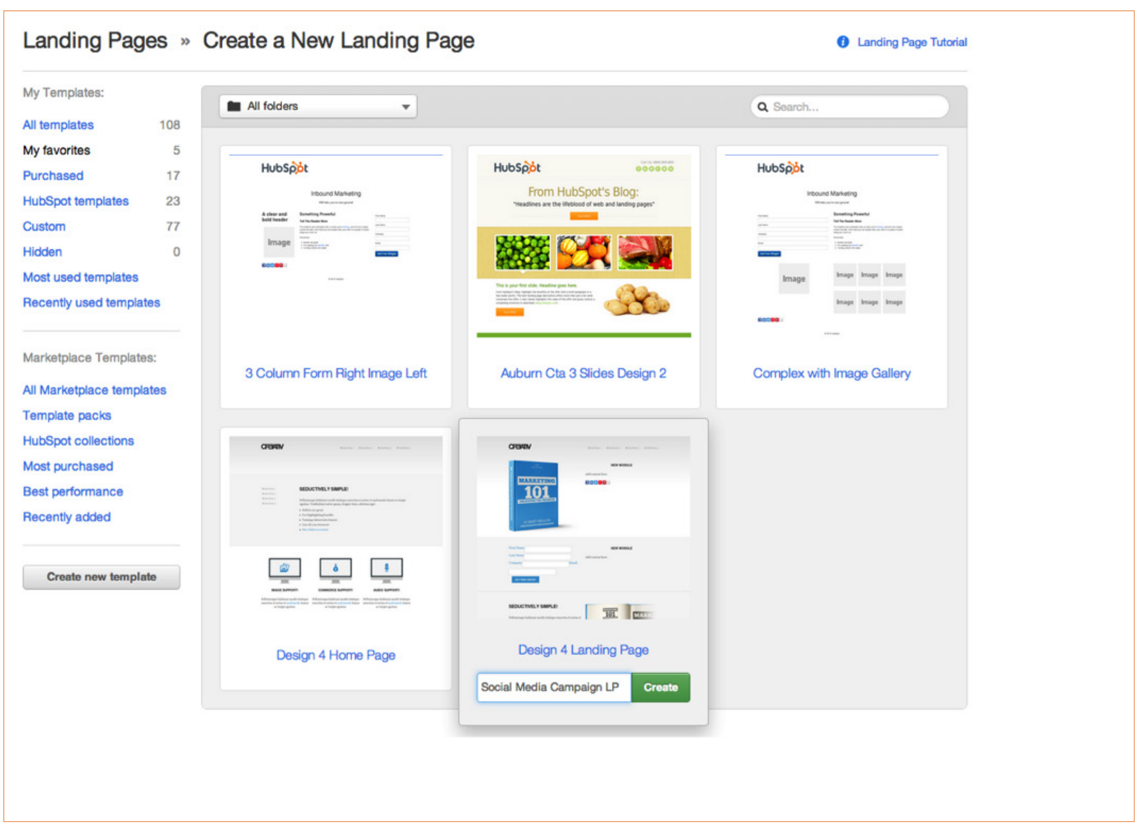
Create a landing page

Now that you have created your offer, it's time to set up your landing page and thank you page. The landing page and offer will be the centerpiece of your campaign. It's what you'll drive all the traffic to. You can do this from right within the campaigns app, in fact, it's the first item on the campaign list.

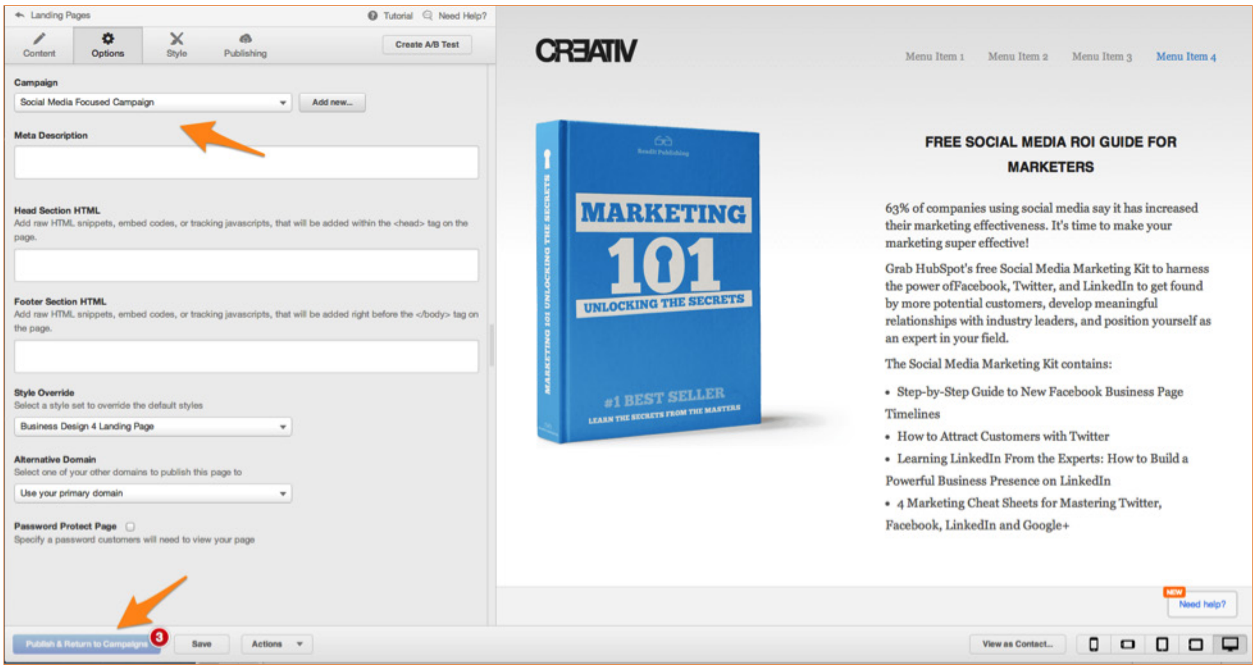


[DO IT IN HUBSPOT]

Click create a landing page and you'll be dropped in the landing page tool. First, pick a template for your landing page, then create the page.



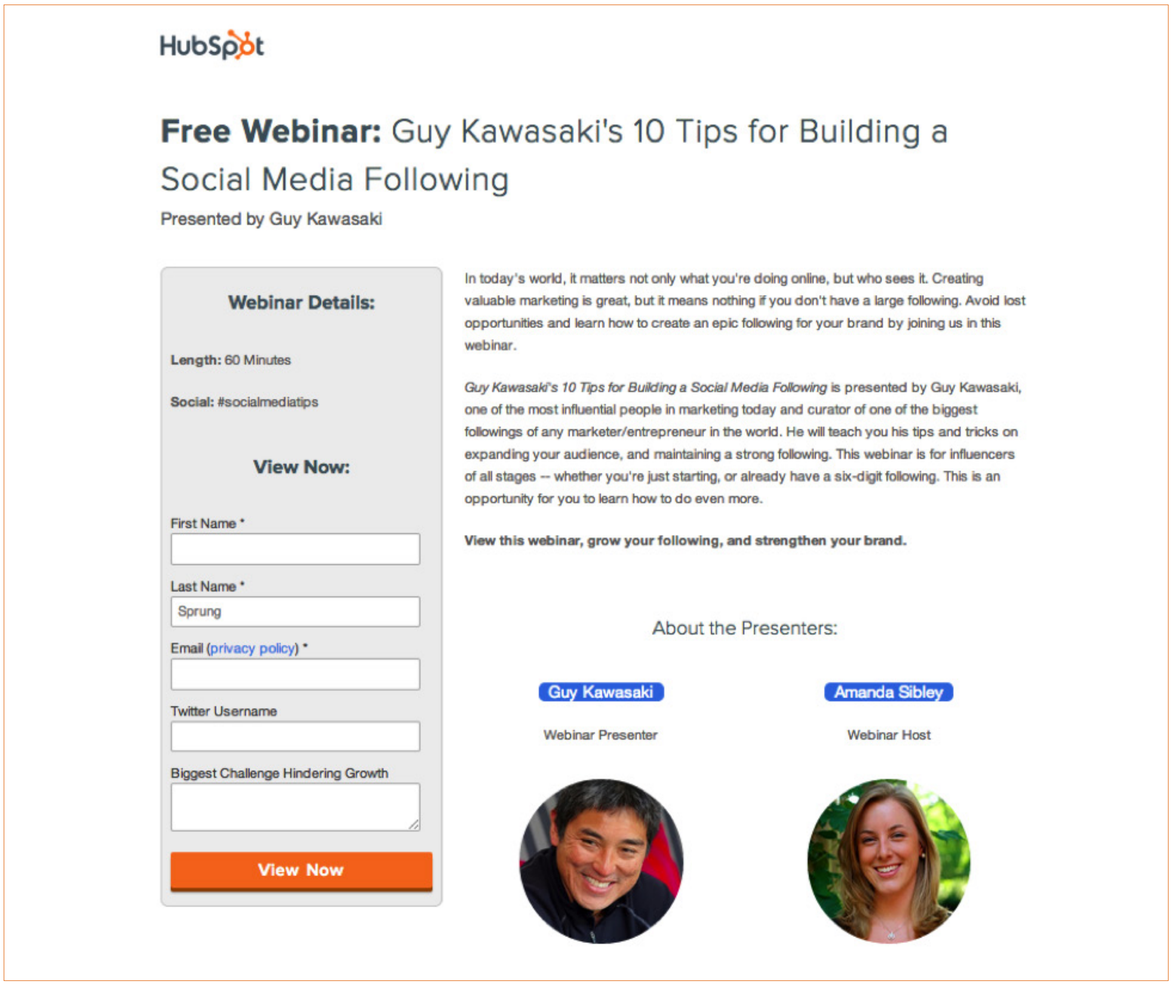
Because you started in the campaigns app, the page will automatically be tracked as part of that campaign. If you didn't, just choose the campaign title from the drop-down on the options tab.



In your landing page, choose a page title that will appear in the browser title's search results. Even though this title will not actually appear on your webpage, it will be important for your page's SEO.

Next think about the header of your landing page. The header should include the title of your offer and what the visitor will receive. For example, if you are giving your audience a free eb-ook about mobile marketing, your header should read "Free Ebook: Mobile Marketing." When someone comes to your page, they immediately want to know what they are going to get. If it takes them too long to find the information, they may look elsewhere for similar content. Help the viewer by telling them as soon as they get to the page what you are going to give them. If you want, you can also include a subheader that will give your visitor more information about the offer. The subheader should really explain the value of the offer and what the reader will gain by reading the offer.

Here is what a live landing page looks like. Using HubSpot you can preview the landing page by clicking on the Actions tab on the bottom left and selecting Show live preview. You can also view how your page will look on different devices: mobile devices or tablets. All pages created in HubSpot are automatically responsive to whatever device you are viewing them.



By now your visitor should be intrigued by what they are going to get, but they want some more information. The next section of your landing page is the place they should get that. Explain the value of your offer in 1-3 short paragraphs that will include the benefit the visitor will receive from downloading the offer. If you can, include bullet points that highlight some of the benefits of the offer. Most people like to scan webpages, and bullet points will make it easier to do that while still understanding the information you are providing.

Next to that text include an image you want to showcase your offer. That could be the cover of an ebook, a quote and headshot of the author or speaker if it's a webinar, or other visuals that you think give the visitor a better idea about the offer.

Include social sharing buttons on your landing page. This will help spread your content to a visitor's audience. For example, if someone likes the content, they may tweet out your link on social media. Make it easier for them to do so by having social sharing buttons on your landing page so that in one click a visitor can post the landing page to their social networks.

Your final step in optimizing your offer is including a meta description about your offer. Meta Descriptions are shown in search engines as text to support a result. They can assist in clicks and relevance by helping visitors understand what your webpage is about before even viewing it. In HubSpot you can also connect your landing page to a campaign you are running that has other components. As you are creating your inbound marketing campaign, this will help you keep track of all the different pieces.

Now that the content on your landing page is done, you need to create a form to gather information from your visitors. After all, if you are giving them content you created, you want to know a little bit about them. Your form should be between 3-7 fields and should ask questions that can help your sales team qualify these leads. Consider carefully what questions you want to ask. If your form is too long, that may discourage visitors from filling out the form.

In HubSpot there are form templates that you can use to get started, and there is also an option to build your forms from scratch. You can also choose to make your fields required and/or smart. If a form field is smart, that means that after someone fills it out once, they never have to fill it out again. This allows you to ask your prospects and leads new questions when they come to your pages to help you get to know them better. Instead of asking the same questions over and over, you can ask new questions that give you more information about them.

After someone fills out your form, they should get a follow-up email with information about their downloaded offer or a link to the thank you page. Finally, you must create the thank you page. The thank you page is the page that your visitors should be redirected to as soon as they submit your form. On the thank you page, you must include the offer the landing page references. Additionally, you can include social sharing buttons to encourage promotion of your landing page, links to free trials or demos of your product to further qualify your leads, or even additional content they may be interested in. Don't overcrowd your thank you page, but including relevant information can only help your leads and give you more information about them.

In HubSpot, we recommend that you use the landing pages tool to create your thank you page. That way you can include an additional form that your visitors can fill out to further qualify them. Building this page in landing pages will make it easier for you to add that form. Don't forget to add it to the original campaign using the campaign drop-down in the options tab.

Woowhoo! You've got your offer built. The centerpiece of your campaign. Let's pause for coffee and to admire your landing page and offer. Then return to the campaigns app to choose your channels.

RESOURCE

Did you get stuck anywhere? Visit the Landing Page User Guide for step-by-step instructions on creating landing pages in HubSpot.

CHAPTER TWO

GET PEOPLE TO YOUR OFFER

Now that you have your offer and landing page built, let's get some traffic to it. Start by choosing the channels that make the most sense for promoting your offer. The campaigns report will give you a full list of the channels you have available to promote your offer. Below we'll breakdown the best practices for each.

Emails

If you've got an existing list of contacts who might be interested in your offer, start there. Or you can create a list from your contact database by setting some targeting criteria and creating a smart list in the Lists tool. (Help doc: How to create a smart list). When you're ready to create your email, here are a few things to keep in mind.

Subject line: When you craft your email think most heavily about your subject line, that's the first decision point for your recipients. Avoid statements like "Free ebook!" or "Download this whitepaper." Instead, focus on what your ebook solves for them, for example: "[Topic] Tips for 2014" or "Learn how to [topic] in 3 steps"

Personalization: Keep the message inside your email short and action-oriented. Use personalization tokens to personalize your email to each recipient.

Social: Make sure you add social sharing buttons to your emails. If you've chosen a template with social sharing you can easily toggle on the social networks you want to include and link back to your campaign landing page.

Finally, add a CTA in your email that will drive people to your campaign landing page.

[DO IT IN HUBSPOT]:

Go create your email!

(Don't forget to use the dropdown under options to add it to your campaign!)

Blog Posts

Email is good for alerting your existing contacts about your offer, but what about attracting new ones? To do that click on the blog post link within the campaign report and start your blog. The goal of the blog is to attract people interested in the subject matter of your offer, so you'll want it to be on a similar topic and then link to your landing page for a deeper dive.

Any subsequent blog post you write that is associated with the campaign you can add to the campaigns app by selecting the campaign drop-down on the options tab. Finally, add a CTA to your blog post at the end that will drive people to your campaign landing page.

Go create your blog!

Before you publish, make sure to attach the blog to your campaign in the options tab.

Social Messages

Once you publish your blog, head on over to your social media publishing tools. You can promote the blog or the landing page itself. Just be clever with the content and don't repeat the same post again and again. Instead, tailor messages for each channel.

RESOURCE

You can use this worksheet to plan out a week's worth of tweets and upload them directly into HubSpot. (Make sure each social share is tied to your campaign!)

[DO IT IN HUBSPOT]:

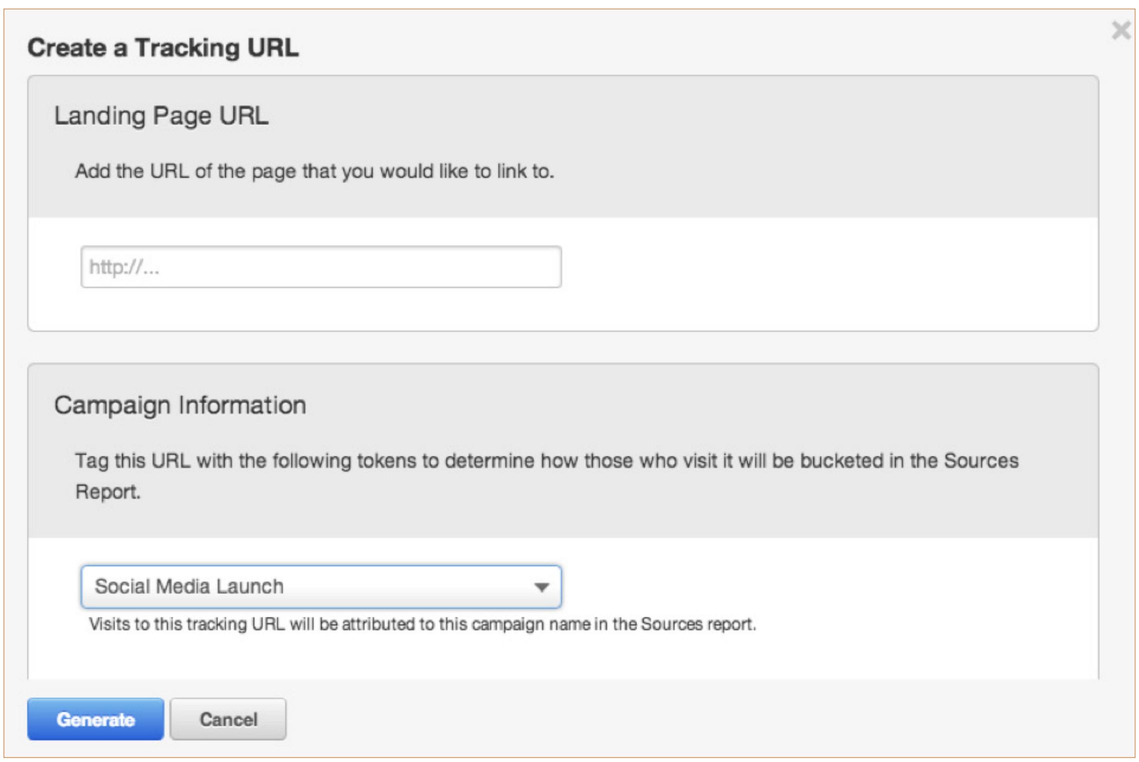
Go create your social shares!

Pay-per-Click

While paid advertising isn't necessary for a good campaign. If you have the budget, you can certainly support your campaign with pay-per-click ads. To track your ads as part of your campaign, just be sure to create a tracking URL. A tracking URL is a normal URL with a "token" attached to the end of it.

- Normal URL: http://www.hubspot.com/inbound-marketing-assessment-product/
- Tracking URL (token is bolded): http://www.hubspot.com/inbound-marketing-assessment-product/**?utm_campaign=winter-lead-campaign**

If that looks complicated, don't worry. There's a simple tool within the left column of the campaigns app that will help you create one quickly.



[DO IT IN HUBSPOT]:

Go create your tracking URL for PPC!

A note on Keywords, Workflows and Other Sources

Just like the above promotion channels, Keywords, workflows and other sources can be tracked within the campaigns app as part of your campaign. It's up to you whether you want to incorporate them.

CHAPTER THREE

NURTURE PEOPLE WHO CONVERT TO YOUR CAMPAIGN OFFER

You've got everything in place to convert your visitors into leads. A solid offer, a well honed landing page, and you are starting toll promote it. But it doesn't end there. Crafting an effective campaign means thinking beyond conversion, and considering what happens after someone clicks submit on your landing page.

That's where marketing automation comes in. Marketing automation will help you qualify and develop the leads your campaign generates, nurturing them from early stage leads to interested prospects who are a good fit for your product or service.

Marketing automation: what it is, what it isn't

What is marketing automation, exactly? It can be confusing, because "marketing automation" is a term that is sometimes used to refer to marketing software in general. In reality, marketing automation refers to a set of tools and processes that can be used to communicate with existing leads at scale, bringing them closer to the point of buying.

While marketing automation is an important part of our campaign, it's important to remember that marketing automation is only one piece of the larger puzzle required to run a successful campaign, and that marketing automation has limitations. Specifically -

- Marketing automation isn't a silver bullet. In addition to marketing automation, you need a steady stream of new leads (discussed in the first chapter of this campaign guide.) Marketing automation can help get your campaign achieve results, but it won't take you there by itself.

- Marketing automation won't turn coal into diamonds. Some marketing automation providers and "experts" emphasize setting up complex campaigns and scenarios as a means to sell you more tools. At the end of the day, it's important to remember that no marketing automation tool will turn junk (purchased lists, constantly recycled email addresses, etc.) into valuable leads.

- Powerful tools come with great responsibility. Nurturing & marketing automation tools allow you to communicate at tremendous scale, amplifying your messages across a huge number of people over time. For this reason, it's important to get it right from the start, and build your campaigns out with a larger strategy in mind. We'll start developing that strategy below.

(Pre)segmenting the leads you'll generate

Before you start writing emails and setting up your nurturing flows, first think about who the leads are you are likely to generate, and how you should follow up with them. It's possible that one nurturing track and one set of messages will work for all of the leads your campaign generates, but it's more likely that you can segment those leads and nurture them in more targeted ways. For example, if your business caters primarily to two specific industries, you may want to segment nurture leads in each of those industries in different ways, with different content.

To figure out what those segments may be, ask yourself a couple of questions -

- What are the similarities and differences between the leads who will likely convert on my offer? Can I divide those leads into different buckets? How would I treat leads differently from one another?
- What are the important characteristics that make these leads different from one another, and how can I segment in my marketing automation system based on those characteristics? In HubSpot, for example, you can segment based on explicit details about a lead (things we already know about them from past form submissions, our CRM system, etc.) - and implicit details (behaviors like pages they've viewed on our website, activity scores, and more.)

Once you've thought about who those segments are and how many nurturing flows you'll ultimately build out, you are ready to start drafting your email content.

[DO IT IN HUBSPOT]:

Get started by creating your own lists and segments right now.

Defining your goals and creating email content

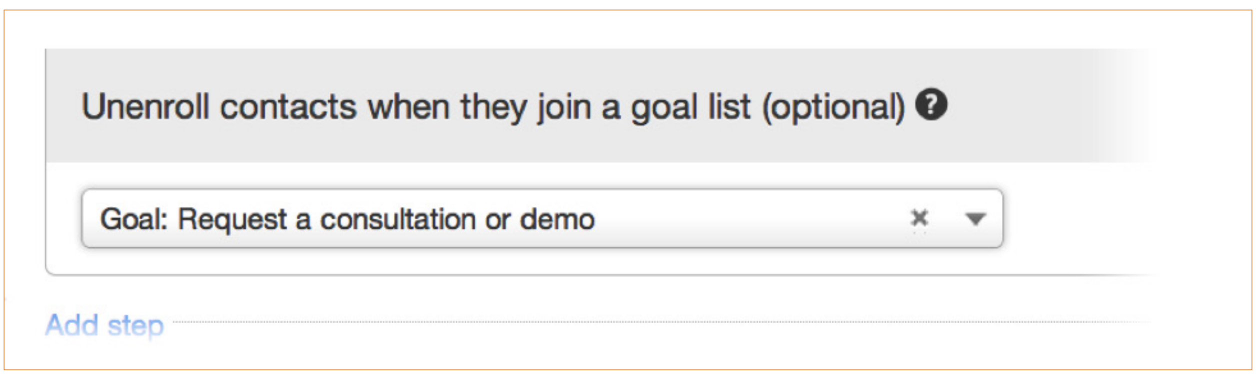
You have your segments in mind, and you are ready to start writing the email content for your nurturing flows.

When deciding what kind of content you'll use, it's helpful to ask yourself what your ultimate goal is for each segment you plan to nurture. If your high level goal is to turn early leads into sales ready leads, what does that mean in practical terms? Do you have different goals for different segments?

Here are some examples of goals HubSpot customers typically define for their nurturing flows -

- Get leads to request a demo or free trial of our product
- Raise a lead's lead score above 80
- Get leads to visit our product or pricing page

In HubSpot, you can actually tell the system what your goal actually is by creating a list of people who have met the goal, and associating it with your workflow. Setting a goal will help you report on the effectiveness of your workflow, and can help you manage how leads move between workflows in more complex nurturing scenarios.

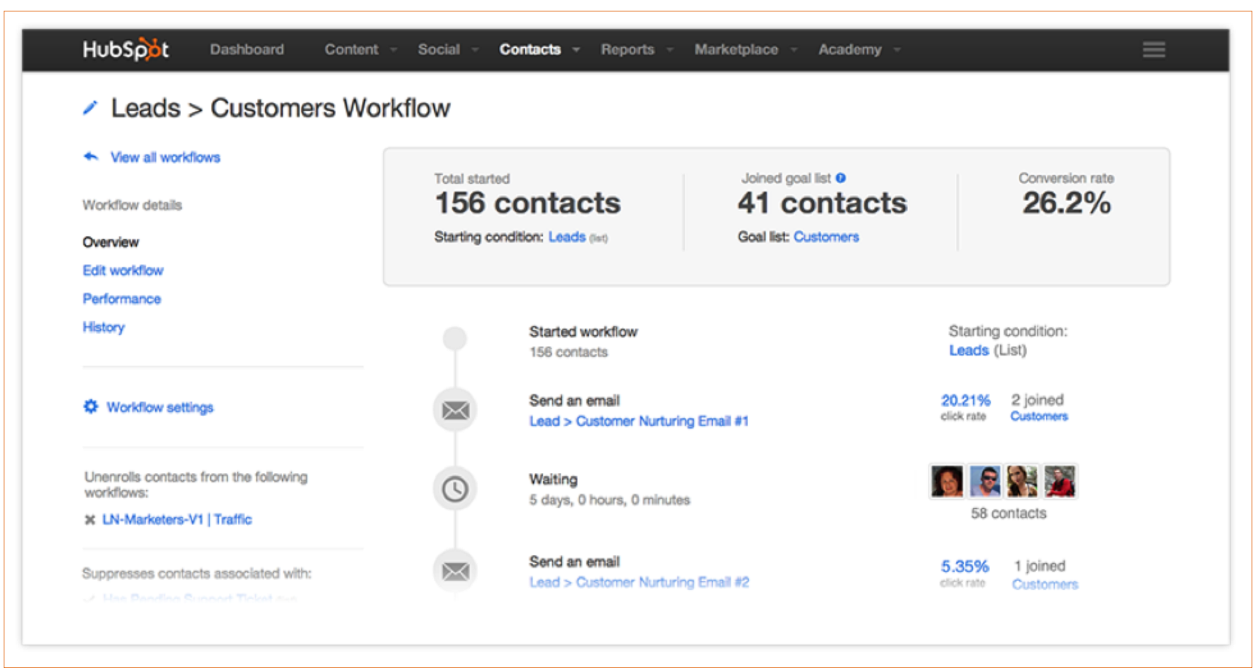


Once you've determined the goal for each nurturing flow, start mapping out your emails and your content. Here are a few tips:

- Above all else, ask yourself how each email is connected to your goal. How does it push your leads closer to being ready for your sales team? What are the opportunities in your email for them to meet the goals you've set?
- Most or all of your emails should be educational or useful in some way. The most effective workflows include a mix of useful, interesting content like relevant blog posts and calls-to-action that are well aligned with the overall goal.

[DO IT IN HUBSPOT]:
Get started by [writing your email content](), then [tying it all together in a workflow.]()

Now that you've mapped out your segments, your goals, and the steps (emails) you'll use to move leads closer to those goals, you can connect it all together in your automation tool. Here is what a completed automation flow looks like in HubSpot:

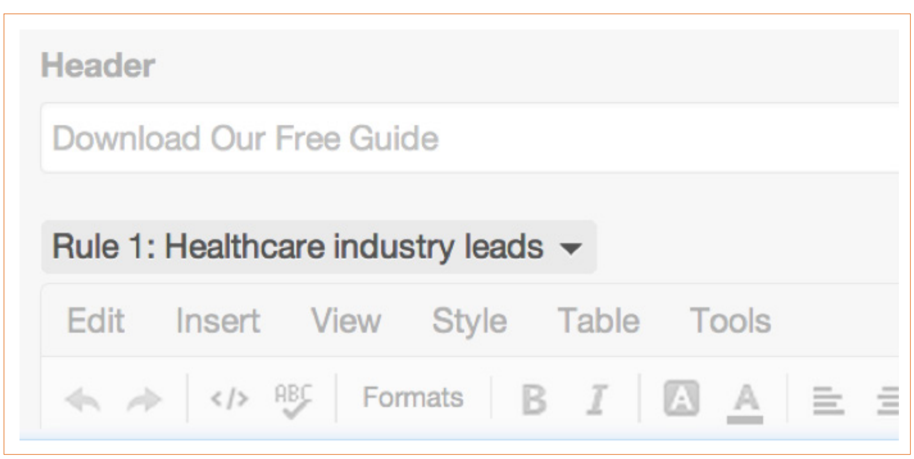


Nurturing through your website

You've got your emails written and your automation flows in place. That's great! But nurturing your leads shouldn't stop at the inbox. Your leads are likely coming and going from many different parts of your website all the time. Maybe they directly type in your web address to get to your homepage, or click a link on social media and end up back on your blog. Depending on the tools you use, you may be able to deliver targeted messages to these leads, too.

In HubSpot, you can use the same segments you built earlier on to "nurture" leads when they visit your website, too. You can change the contents of entire blocks of content on key pages like your homepage or blog, controlling what specific segments of leads see when they visit those pages. Consider using personalized content to:

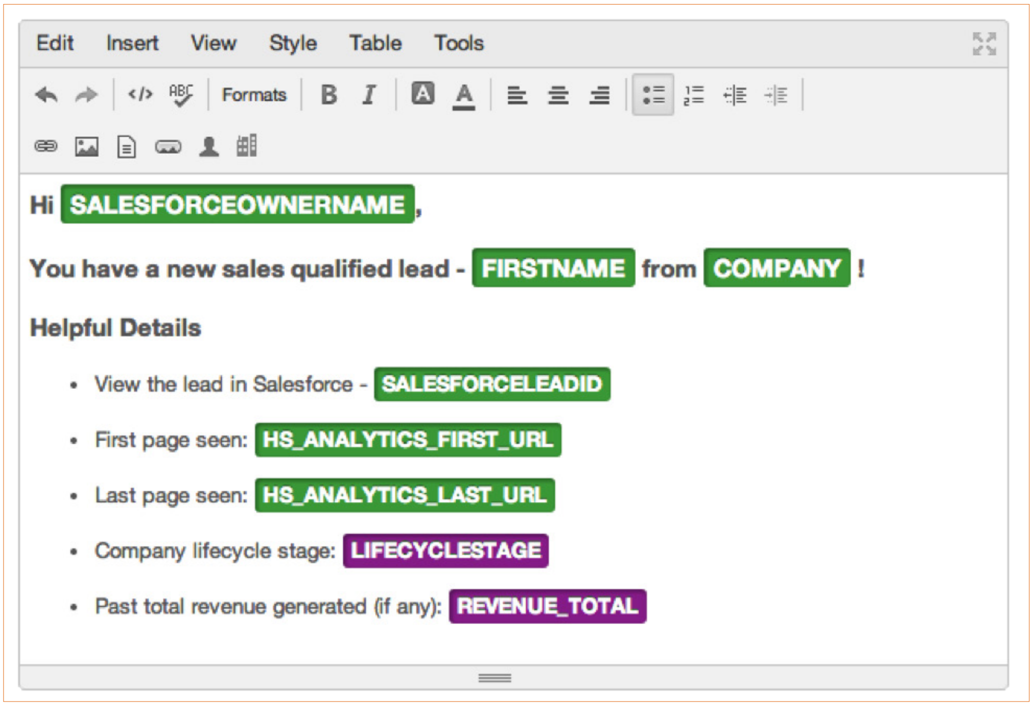
- Deliver more targeted, relevant messages on your website. Following our example from above, if you primarily cater to two different industries, why not show the leads your campaign generated content based on their industry when they visit your website?
- Show different calls to action to different groups of leads across your website. As we mentioned above, you may have different goals for different types of leads. With smart content, you can encourage each lead to take the next step that is targeted toward them using smart content rather than a generic call to action.



When leads are ready for your sales team

The machinery of your campaign is almost fully set up! To take things the final mile, give some thought to when and how you'll pass leads to your sales team. How this process takes place varies widely from company to company, and it's possible you have a system in place already. Here are some tips on setting one up if you don't already have such a system:

- **Come to an agreement with your sales team about when leads are considered to be "sales ready".** Again, chances are that a lead who just converted on your landing page isn't yet ready to talk to a salesperson. Is it a lead score, or activity threshold that determines when a lead is ready for your sales team? Maybe a specific action, like a lead requesting a demo or to talk to sales?
- **Determine the mechanics of the hand-off**. How important this is will depend on your overall lead volume. If you get a few leads, you may walk over to your sales folks and have a face to face discussion about each lead that comes in. If you get a large volume, it's helpful to have an ongoing process in place. In HubSpot, you can control when leads sync to your CRM system based on certain criteria, notify your sales reps on their desktop of a new lead, send an email notification to the rep with important details about the lead, or use a combination of methods.
- **Empower your sales team with data**. As a marketer, you have access to a huge amount of data about the leads you generate. This data can help your sales team follow up in the most effective way, so give thought to how you can share it with them. In HubSpot, important details like lead score, recent pages visited, and behavioral data is sent along with each lead to an integrated CRM system, and can be included in notification emails that automatically get sent to the lead owner (see the example, sent from HubSpot, below.) Individual interactions like a prospect opening an email from a rep can be surfaced on the rep's desktop through our free tool called Signals. There are many tools out there both free and paid that can help keep your sales team informed.



Final testing and taking your campaign live

Now that the mechanics of your campaign are in place, it's time to take things live and do some final testing. Before you start pushing traffic to your campaign, it's always a good idea to go through the process yourself to make sure that everything is working the way it should be. A campaign has a lot of moving pieces, and it's easy to forget or overlook the small details. You may even want to have a few other folks in your company convert on your landing page and kick the tires of your campaign too as an added assurance that everything is working properly.

Once you've completed your testing, pick a go-live date, and kick things off! Congratulations - you've just launched your campaign.

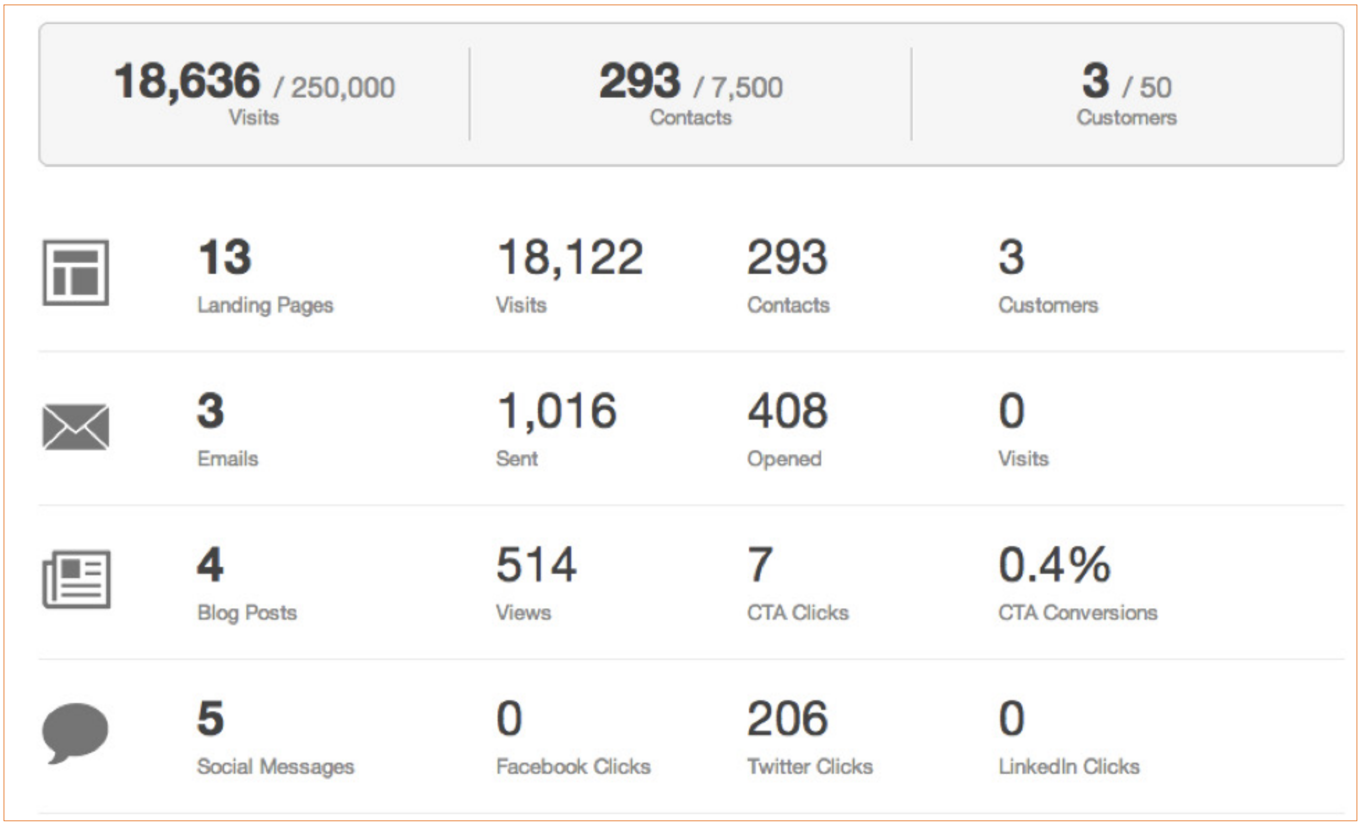
RESOURCE

You've seen the process, now plan it yourself! Download this helpful worksheet that you can use to map out your automation flows, emails, and personalized website content.

CHAPTER FOUR

MEASURE AND REPORT ON IT ALL

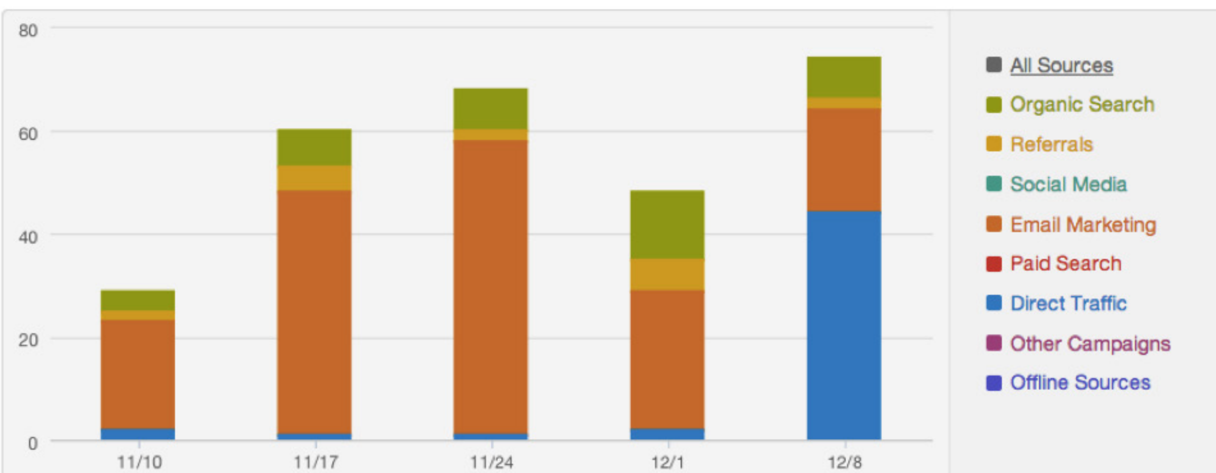
Measuring your campaign is important. You can do this at any given point throughout the campaign or at its conclusion. To do this, go back to the Campaigns report in HubSpot. Here you can see the full spectrum of your campaign, all of the landing pages, emails, blog posts, social messages, keywords, PPC campaigns and other sources that are contributing traffic to your campaign.



If you're not happy with the campaign performance so far, use the analytics to find weak spots. Take a look at your landing pages first. Clicking on landing pages will show you all of the landing pages that are tagged as part of your campaign.

Landing Page	Visits	Contacts	Customers
The Social Part of Social Media: A Love Story (EMEA)	4,852	135	0
The Future of Social Media: Personalizing Business By Focusing on Peo...	4,350	0	0
How Twitter Can Solve Challenges for Marketing, Support, and Sales (V...	4,145	165	1
Customers - Social Inbox Early Access	2,997	191	14
How Twitter Can Solve Challenges For Marketing, Support, and Sales | ...	2,285	0	0
Social Inbox | Early Demo (Variation)	1,510	21	1
The Social Part of Social Media: A Love Story (Infographic Variation)	1,500	30	0

It looks like we have a couple of landing pages here that aren't converting as well as we'd like. Let's dive deeper to see if we can improve them. We can either make improvements to the landing page or we can see which channels are working to bring in people who convert and double down our efforts on those.



Source	Views	Submits	Contacts	Customers	View → sub.	View → cont.	View → cust.
Email Marketing	172	80	1	0	46.51%	0.58%	0%
Direct Traffic	50	20	4	0	40%	8%	0%
Organic Search	40	9	4	0	22.5%	10%	0%
Referrals	17	8	6	0	47.06%	35.29%	0%
Offline Sources	0	0	0	0	0%	0%	0%

Now go back and see how your promotion channels did overall in the campaign:

- Which emails did the best at bringing people into the campaign?
- What blog topics led to the greatest number of conversions?
- How did PPC compare to Social?
- Overall, what channels are most effective in this campaign?

Wrapping it all up

Inbound campaigns are an impressive feat once you have all channels firing toward the same end goal. While this playbook walked through an effort to generate leads interested in a particular focus area, you could replicate this campaign for a product launch, major event registration or other time-bound goal. The trick is, keep your campaigns focused and powerful. At the conclusion of your campaign you can use the campaigns app in HubSpot to summarize the totality of your work and give you a playbook of your own for future campaigns.