



*"This is a presentation about what it takes to create and sell something remarkable. It is a plea for originality, passion, guts and daring."*

--- Seth Godin

**Nurture**

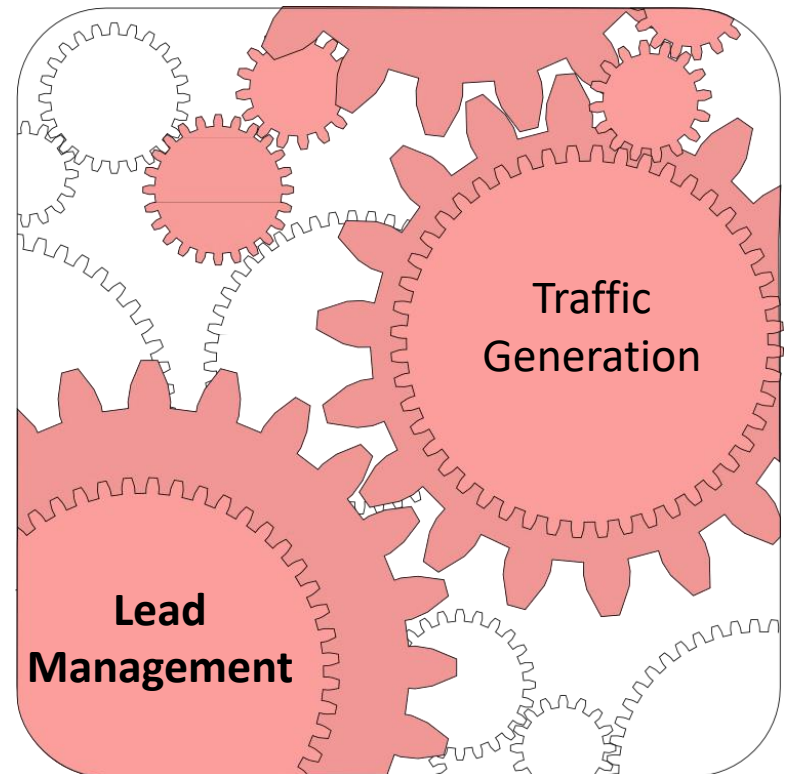
**Workflows**



# Presentation Topics

## Nurture Key Tasks

- 1 Social Media Monitoring and Publishing
- 2 Calls-To-Action
- 3 Landing Pages
- 4 Email Campaigns
- 5 **Workflows**
- 6 Forms
- 7 Information Sources



# Lead Management



Understand

Segment

**Nurture**

- ✓ Social Media
- ✓ *Calls-to-Action*
- ✓ *Landing Pages*
- ✓ *Email Campaigns*
- ✓ **Workflows**
- ✓ *Forms*
- ✓ *Information Sources*

# Workflows

.....

**WORKFLOWS YOU  
CAN SET UP TODAY!**

.....

The right content to the right  
contacts at the right time

the  
right  
message

RIGHT RIGHT  
TIME PLACE

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

## Workflow:

- A series of automated actions that can be triggered to occur based upon behaviors or contact information



## Workflow:

- When is the right time to start using Workflows?

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



Customize The Timing of Your Workflows



Workflows Are Smarter Than Standard Marketing Automation





By Caleb George Morris



Starting Condition



Actions

# Ready?



Time Delays



Settings





# Starting Condition

## 1 A Sample Workflow When a Form Is Submitted

Begin this workflow when:

A form is submitted | International - Summer ... | On any page

Add step

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

Send an email | LN-International-Summ...

Begin this workflow when:

- A smart list is triggered
- A form is submitted
- A smart list is triggered**
- No starting condition

## 2 A Sample Workflow Triggered by a Smart List

Begin this workflow when:

A smart list is triggered | LN-Prospects-NonMG...

Add step

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

Set a contact property... | is being nurtured | True

## 3 A Workflow With No Starting Condition

Begin this workflow when:

No starting condition

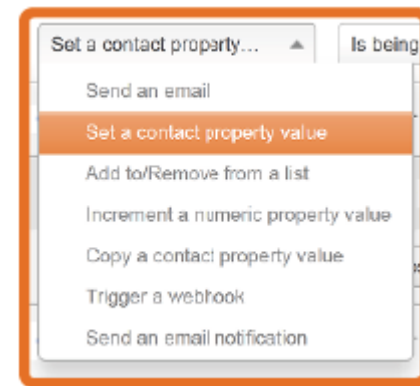
Add step

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

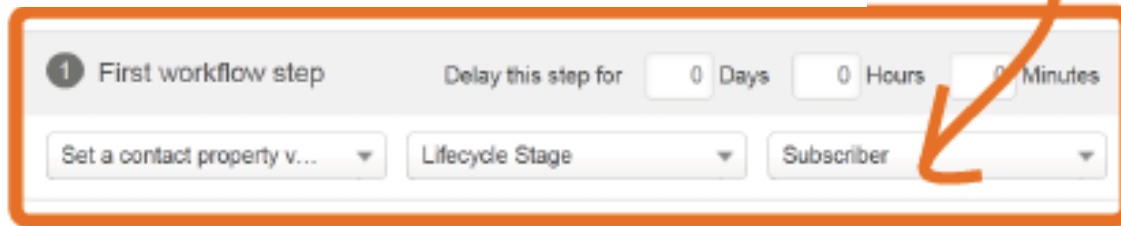
Send an email | LN-International-Dem...



# Actions

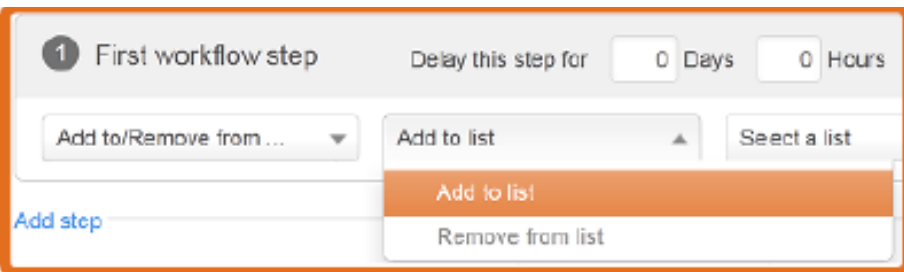


## 1 Setting Up a Contact Property Value

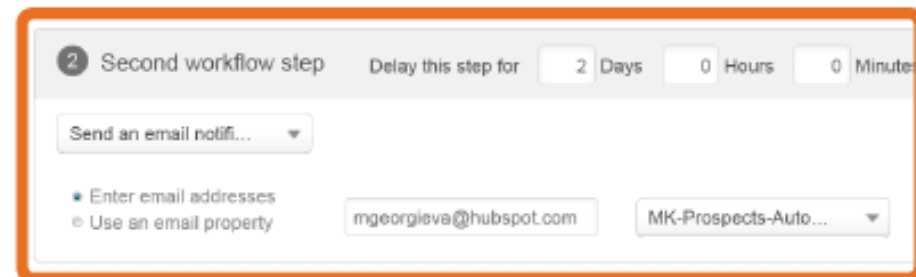


## 2 Sending Automated Emails

## 3 Add a Contact to a List or Remove Them



## 4 Send Email Notification





# Time Delays

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

Send an email notifi...



ALIGNMENT



# Settings

Execute steps on business days only?

- Yes
- No

Execute steps only within a certain time range?



- Yes
- No

Execute steps between  and

From which other workflows should a contact be unenrolled when this workflow begins?

- All
- None
- Select specific campaigns

# Workflow Demonstration

 AIS-Student-Chapter-W 

Workflow Description

 [View all workflows](#)

Workflow details

**Overview**

[Edit workflow](#)

[Performance](#)

[History](#)

[Settings](#)

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Workflow actions

[Test workflow](#)

[Clone workflow](#)

Total started

**13**

Joined goal list 

**0**

Use a goal list to monitor the performance of your nurturing workflow. [Learn more](#)



Started workflow

13 contacts (0 active)

Starting condition:

[AIS Student Chapter Interest \(list\)](#)



Waiting

1 minute



Send an email

[AIS Student Chapter Welcome Automated](#)

**61.54%**

click rate

Completed workflow

13 contacts



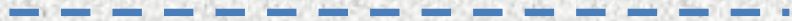
By Caleb George Morris

# Ready?

## Exercises

Page 24 of the workbook

- ❑ What ways can you use workflows?



Workflows are a series of automated actions that can be triggered to occur based upon an individual's behaviors or contact information.

# workbook exercise #7

## ?? Minutes

Create a workflow





Thank You!

*innovation*