



"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

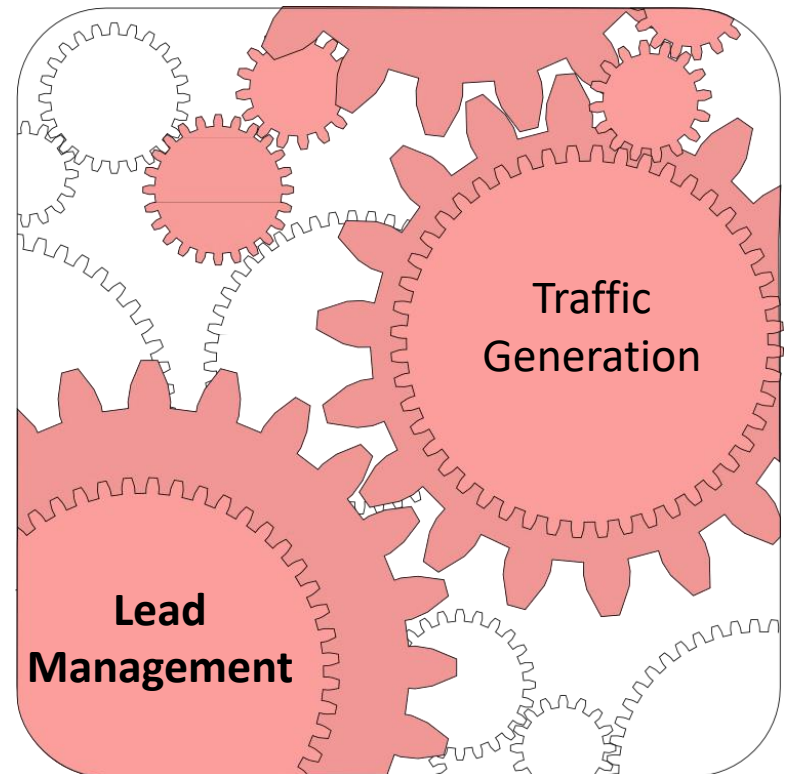
Forms



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*

Forms

WHY USE FORMS?

A **website form**...

is a series of questions,
usually hosted on a
landing page.

School of Business Administration

Welcome Organization Events Officers Opportunity In The News Videos About AIS A Future in IS BizBlog

Welcome

YouTube RSS+ LinkedIn Twitter Facebook

Home
Admissions
Academic Programs
Student Resources
Faculty & Research
Alumni & Friends
Career Planning & Placement
About Us
Ways to Give
CARMA

Student Chapter of the Association for Information Systems

--- Information Technology Organization ---

Welcome!

Information Technology Organization is the Wayne State University School of Business Administration's Student Chapter of the Association for Information Systems.

Benefits:

There are many benefits for AIS student chapter members, including:

- Gaining a competitive advantage to succeed within the field
- Readily available information systems career and technology information
- Gaining world-wide recognition through competition and award programs
- Campus-wide interaction among students from information systems programs
- Expanding career opportunities

Interested in AIS?

First Name

Last Name

Email *

Why Join ITO

- Encourage the pursuit of information systems excellence
- Offer information systems career and technology information
- Provide networking opportunities to those interested in information systems
- Promote interaction among students from information systems programs

School of Business Administration

Welcome Organization Events Officers Opportunity In The News Videos About AIS A Future in IS BizBlog

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Collected form information is **added to Contacts database**. Powering the rest of your marketing.

FORM LOGIC BEST PRACTICES

- Gather information your marketing/sales team both need/want to capture.
- Build form based on perceived value of the offer.

SOME OF THE BASICS, COME OUT-OF-THE-BOX WITH HUBSPOT:

- Email address (most important on any form)
- First name
- Last name
- City
- Company Name
- Company URL
- Twitter Handle
- And many more.

WOULD KNOWING THE FOLLOWING HELP YOU?

- Budget
- Location
- Job role
- Industry
- Biggest problem/challenge

THESE QUESTIONS ENABLE YOU TO:

1. Immediately qualify a lead.
2. Bucket them into a buyer persona segment.
3. Learn more about the contact's situation – like their needs, desires or concerns.

- How long is **too long**?
- Which questions are **appropriate to ask & when** ?

See HubSpot in Action

First Name *

Last Name *

Email *

Company Name *

Phone *

Website URL *

Role *

Employees *

Do you sell to other businesses (B2B) or consumers (B2C)? *

My company provides marketing services such as PR, SEO, web design, or other e-marketing? *

When are you available for a demonstration? *

There is no perfect formula.

PROTIP: USE SMART FIELDS

The image displays five overlapping form snippets, each representing a different form layout. Each snippet has a title in pink text: "Download Now" or "Download Now".

- Snippet 1 (top left):** Title "Download Now". Fields: "First Name *" (empty), "Email *" (empty). Button: "Submit".
- Snippet 2 (middle left):** Title "Download Now". Fields: "First Name *" (empty), "Email *" (empty). Button: "Submit".
- Snippet 3 (bottom left):** Title "Download Now". Fields: "First Name *" (empty), "Email *" (empty). Button: "Submit".
- Snippet 4 (middle right):** Title "Download Now". Fields: "First Name *" (empty), "Email *" (empty). Button: "Submit".
- Snippet 5 (top right):** Title "Download Now". Fields: "First Name *" (empty), "Email *" (empty). Button: "Submit".

The "Smart Fields" feature is demonstrated by the fact that once a field is filled in one form, it is automatically filled in all other forms that share that field. For example, in the top-right snippet, the "First Name" field is filled with "John". In the middle-right snippet, the "First Name" field is filled with "John" and the "Email" field is filled with "john.d@example.com". In the bottom-right snippet, the "First Name" field is filled with "John" and the "Email" field is filled with "john.d@example.com".

Mark fields as Smart – so when somebody fills out the information, it will be removed from that form and any others that have that question, and are also marked “smart.”

PROTIP: USE PROGRESSIVE PROFILING

Default questions
These appear by default unless marked as smart . Smart rows are hidden once all of its fields have been filled out.

First Name
Single-line text   

Last Name
Single-line text   

Email
Single-line text   

What is your biggest team-build ...
Single-line text   

  Drag fields to add to the default form.

Queued questions
These replace your smart rows  above in the order you choose below. 

Why Are You Interested In Adven ...
Multi-line text   

Travel Budget
Number   

  Drag replacement fields to get more information over time.

Create a queue of questions, so you can ask for more information over time.



By Caleb George Morris

Ready?

Forms Demonstration

HubSpot Dashboard Content Social **Contacts** Reports Resources

business.wayne.edu Hub ID: 237221

All Forms Tutorial

Details Fields Options

Form Name
Internal name used for organization.
AIS Information Request

Submit Button Text
I'm Interested

This form appears on
AIS - Videos to watch and 2 more

[View submissions](#)

Default questions

These appear by default unless marked as smart . Smart rows are hidden once all of its fields have been filled out.

- First Name**
Single-line text
- Last Name**
Single-line text
- Email**
Single-line text
- Class Status**
Radio select

Drag fields to add to the default form.

Queued questions

These replace your smart rows above in the order you choose below.

- Why Join ITO**
Checkboxes

Save form Edit Preview Actions Help



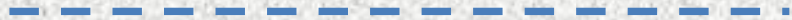
By Caleb George Morris

Ready?

Exercises

Page 26 of the workbook

- What ways can you use forms?



workbook exercise #8

?? minutes

Create a form with progressive profiling



Thank You!

innovation