Lead Nurturing: Let HubSpot Do The Work For You

A Guide To Managing Contacts In HubSpot

Every Contact Has a Place.

HubSpot helps you connect to contacts you wouldn't have been able to reach using the traditional marketing processes.

That doesn't mean you abandon leads generated in other ways.

But, it does mean you need to make sure your contacts are assigned the right **Lifecycle Stage** so they're getting the information they need when they need it.

Before you create new contacts, first decide who fits where.

There are some contacts you don't want to receive automated marketing emails, and some whom you do...follow these rules to know who's who.

Workflows are Triggered based on each Contact's "Lifecycle Stage"

Your sales team collects contact information and HubSpot gleans more information from new contacts through workflows.

Workflows are triggered based on where your contact is in the buyer's journey from the first time they engage with your content.

The power of HubSpot:

Using the Lifecycle Stage

The Lifecycle Stage field is found in the contact record.

HubSpot automatically assigns a contact their place in the Lifecycle Stage. However, your sales team can identify a contact's place in the Lifecycle (and enter it manually) **eliminating the chance contacts will be nurtured when they don't need to be.**

Typically, your Most Used Lifecycle stages:

- Leads
- Marketing Qualified Leads (MQLs), or
- Sales Qualified Leads (SQLs)

Early Lifecycle Stages

When someone first arrives on your website and fills out a form (gives their contact information), they become a **"Lead"**. A contact can also become a "Lead" if a staff member manually adds them knowing that contact is new to what your company can do.

When a contact is a "Lead" they’re enrolled in a workflow and begin receiving marketing information in order to see how interested they are in your company.

Steps In A Contact's Lifecycle Stage

Leads and MQLs get automated content from Tangible Words to lead them closer to the decision stage.

Once a contact becomes an SQL, your sales team takes over with personal contact to close the deal. A contact can be directly added as a SQL if you don't want them to be nurtured.

Managing A Contact's Lifecycle Stage

Your staff may have contacts not on HubSpot, that they would like to add whom are **already fully in your sales process.** In this case, **you should add them as an SQL** since you likely do not want them to receive the marketing emails.

Managing A Contact's Lifecycle Stage

Sometimes your sales team already knows or can read a client to understand they'll balk at nurturing emails. This is why HubSpot gives some control over Lifecycle Stages.

Your hands are never tied so you always can decide what's best for your contacts based on your knowledge and sales instincts.

Managing A Contact's Lifecycle Stage

When that contact interacts and reads some of the information we send, HubSpot will automatically move the contact to "**Marketing-Qualified Lead (MQL)**".

We should **not manually move someone from "Lead" to "MQL"** rather allow the inbound marketing of Hubspot to do its work.

Managing A Contact’s Lifecycle Stage

Navigating A Contact's Lifecycle Stage

When **a contact is an MQL** they will be enrolled in a workflow and begin receiving more in-depth marketing information from your company in order **to see if they continue to be interested in your company**.

When that contact interacts and reads more of the information we send, HubSpot will automatically move the contact to "**Sales-Qualified Lead (SQL)**". At this stage, your Sales teams should start their Sales process with these contacts.

Special Attention for SQLs

The SQL stage tells HubSpot that the contact has been qualified by the sales team and Tangible Words does not need to nurture them anymore. They will not receive marketing emails from HubSpot as a "Sales-Qualified Lead”.

Once you associate a contact with an Opportunity they will automatically move to that stage (also without nurturing). This is true for "customer” as well.

Managing Your SQLs

So if you have already qualified your contact as a sales opportunity then make sure their Lifecycle Stage is “Sales Qualified Lead”. This will mean they will not receive marketing nurturing emails.

If the contact has not been in sales conversations with you, then you should add them as a "Lead" and let Hubspot/inbound marketing do its work to nurture them properly to get them to the stage where they are ready for that first sales call.

Always update the Lifecycle Stage & Lead Status Stage on Hot Leads

Lifecycle Stages

Three types of contacts are slotted into their place on the buyer's journey to make sure they get the content - and contact - they need to make a buying decision. Once at SQL, your company is in charge of the Contact (not Tangible Words).

- **Leads:**

New to you and they need to better understand what you do.

- **Marketing Qualified Leads (MQLs):**

They were interested enough to act on CTAs.

- **Sales-Qualified Leads (SQLs):**

Ready to close the deal with some more contact from your sales team.

No Nurturing.

HubSpot automatically decides where contacts fit into workflows **and** you have the power to manually add them to the right place too.

Customize Lead Status & Deal Settings to aid adoption of Hubspot

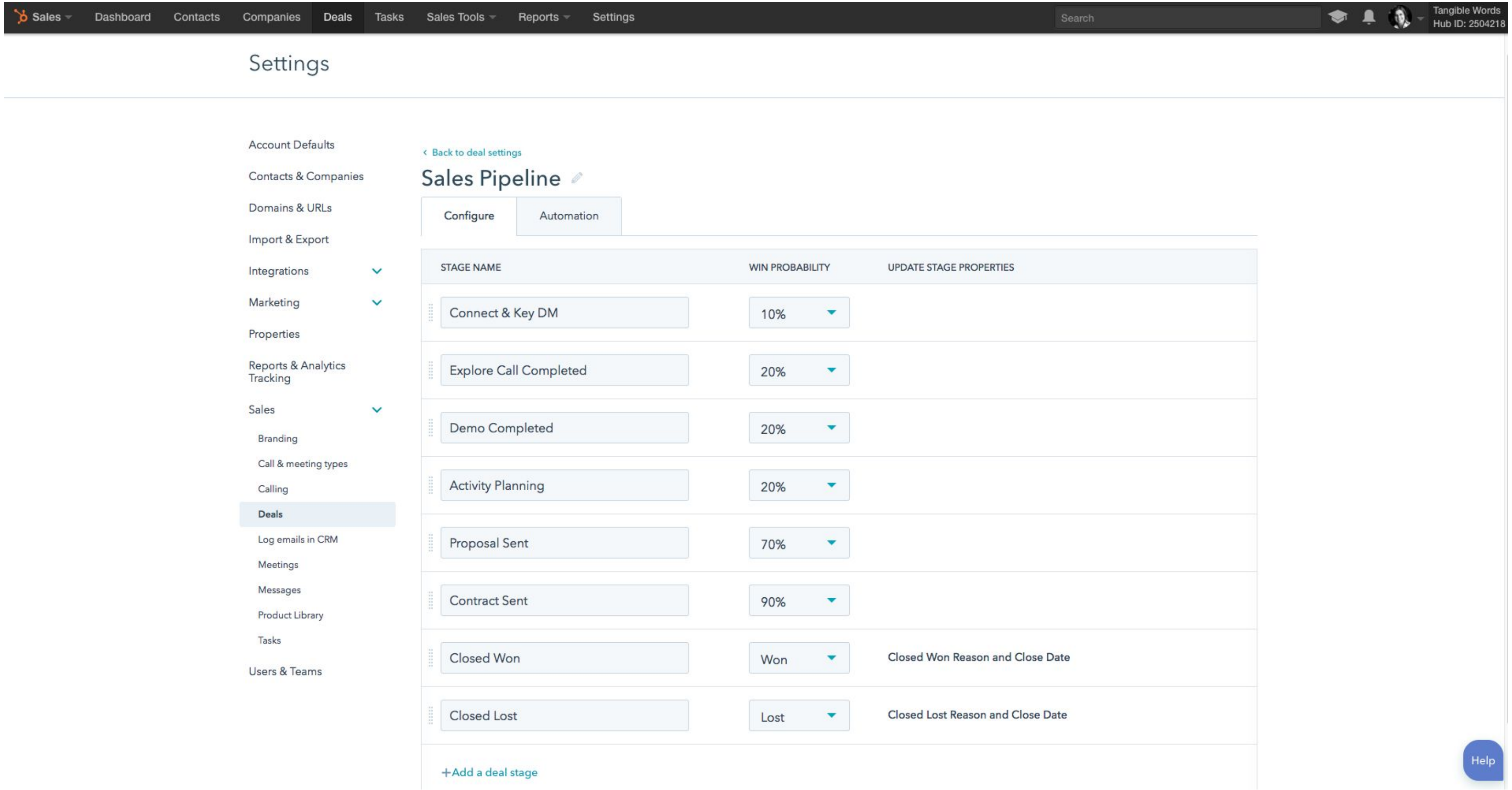
Lead Status

Make sure you edit the settings (Contacts -> Actions -> Edit Properties -> Lead Status) so that it suits your process.

Radio select options

LABEL	INTERNAL VALUE	CONTACTS WITH THIS...	SHOW IN FORMS
New	NEW	24	
Attempted to Contact	Attempted_To_CONTACT	26	
Lost Contact/Stopped Engaging in Sales I	Lost Contact/Stopped Eng	24	
Unable to Make Contact	Won't Respond	2	
In Early Sales Process	In Early Sales Process	31	
Open Deal	OPEN_DEAL	5	
No/Bad Fit	UNQUALIFIED	15	
Closed Won	Closed Won	13	
Closed Lost	Closed Lost	0	

+ Add an option   Load options...



Edit the **Deal Stages** so it fits your process too - if it’s too hard, your team won’t use “Deals”. (Deals -> Actions -> Edit Deal Stages)