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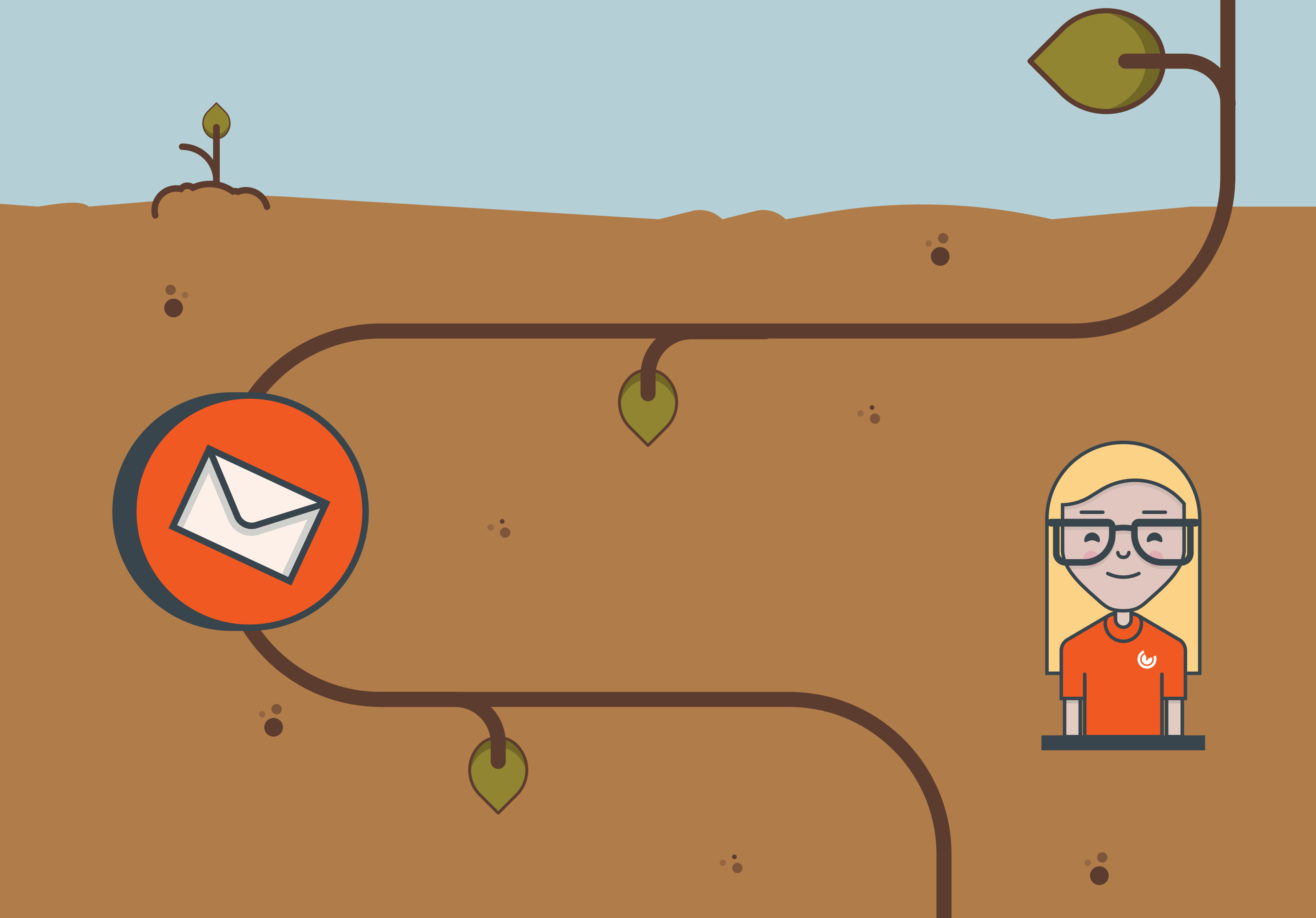
LEAD NURTURING MASTERCLASS



LEAD NURTURING MASTERCLASS

Welcome to the Lead Nurturing Masterclass! Over the next 10 lessons, you will be getting a crash course in lead nurturing, as well as all of the tips, tools, and resources you need to implement an out-of-this-world lead nurturing strategy that will have your leads eager to engage and excited to convert to longtime customers.

Now, we know this is a priority for marketers like you. In fact, according to HubSpot's Global State of Inbound Report, **69% of marketers say converting leads into customers is their top priority**. While an additional **29% of marketers want to reduce the cost per customer acquisition.**

And given that companies that excel at lead nurturing generate 50% more sales-ready leads at 66% of the cost (Forrester), investing in lead nurturing seems like a no brainer.

Why then have 65% of B2B marketers failed to establish lead nurturing and only 29% of brands nurture their existing customers beyond the initial purchase?

We have a hunch! Likely because lead nurturing is complicated, much more so than lead generation. And, there has been no one there to guide them through the process. That's where this course comes in.

The content featured in this masterclass comes from nearly a decade of working on the front lines of digital marketing to help companies convert their subscribers and leads into customers with lead nurturing. This has allowed us to reduce cost per customer acquisition, speed up sales cycles, increase customer lifetime value and generate revenue for our clients.

Now, we are sharing our secrets with you!

The following lessons are here to turn you into a lead nurturing master.

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LESSON 1: INTRODUCTION TO LEAD NURTURING STRATEGY

Welcome to your very first lesson of the Lead Nurturing Masterclass! In this lesson we lay the foundation for crafting your lead nurturing strategy—from defining exactly what lead nurturing is to the benefits it will bring to your business. Not sure if you are ready for lead nurturing? We cover that too.

In this lesson:

1. What is Lead Nurturing?
2. Why Do I Need a Lead Nurturing Strategy?
3. 7 Signs You Need Help with Lead Nurturing
4. Benefits of Lead Nurturing for B2B
5. Benefits of Lead Nurturing for B2C
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What is Lead Nurturing?

Whether well developed or not, chances are that your company already makes use of some form of lead nurturing in its marketing practices. Lead nurturing is the process of developing your company's relationships and mutual trust with customers at every stage of the sales funnel. Lead nurturing strategy revolves largely around the idea of delivering “the right message to the right person, at the right time”.

This involves practices like:

- Scoring and segmenting your leads
- Creating relevant content
- Conversion optimization of site pages and CTAs
- Email marketing campaigns
- Outreach via channels like social media

Why Do I Need A Lead Nurturing Strategy?

Your lead nurturing strategy has a direct effect on the rate of leads who proceed all the way down your sales funnel and become customers.

Marketers see an average 20% increase in sales opportunities from nurtured vs. non-nurtured leads. (Forrester, 2014)

By developing an effective nurturing campaign, marketers can feel more connected with their own leads and establish a stronger reputation in their industry. Lead nurturing also produces other positive effects, including shorter sales cycles and lower cost per customer acquisition—in other words, higher return on investment.

Signs that You Need Help with Your Lead Nurturing Strategy (and Should Take This Course)

1. You're Unsure of What Pieces You Need

Just putting together the key elements of a nurturing campaign may initially seem intimidating! Remember that lead nurturing should contribute to a potential buyer's experience throughout their journey, and thus needs to serve different purposes at various points in time.

A well-developed campaign should include the following components as a baseline (though of course, every campaign should be tailored to best fit your industry and company's unique needs):

- A hook (offer, promotion, etc.)
- Lead segmentation
- Landing pages
- Email campaigns
- Nurture content
- Automation tools
- Analytics and reporting

2. You Don't Know Your Own Leads Well

To cater to your leads' needs effectively, it is necessary to first understand them. While it is realistically impossible to address every lead individually, the goal should be to get as close as possible to this through strategic analysis and organization of your lead list.

This is where lead segmentation comes in. Segmenting leads involves assigning the lead to groups with similar characteristics, needs, and interests using a variety of data. These segments can be based on demographics—such as company position, location, and industry—or behavior—such as the lead's interaction with your site content. By combining segmenting with comprehensive data collection and existing buyer personas from your lead generation strategy, you can confidently deliver the right message to the right people, at the right time.

How can you learn more about your leads? Automated software does a great job with certain behaviors, but there is also a simpler way to acquire information—by finding opportunities to question potential customers directly, whether through landing page data forms, survey emails, or one-on-one interactions.

3. You've Neglected Your Email (or Taken it for Granted)

Email campaigns are a cornerstone of lead nurturing, and regardless of rumors floating around the digital marketing sphere, email is most definitely *not* dead. But if you're using email in an outdated way—un-automated, unsegmented single blasts—you are not doing your nurturing strategy justice.

A well fleshed out email campaign (or ideally, multiple) will require creating a series of emails. These lead nurturing emails get 4-10 times the response rate compared to standalone email blasts! Behavior-based lead segmentation, as mentioned previously, is the key to delivering smartly targeted information to guide buyers with relevant content and offers.

In addition to the copy itself, the timing of how the emails in your series are sent out relative to one another is also crucial. Testing is the key to finding what works (or doesn't work) with your leads.

4. Your Content Lacks in Value

It may seem reasonable to designate one main component of your campaign, such as your emails, as the centerpiece of your juiciest content. However, the multi-channel nature of lead nurturing actually requires a multitude of content—everything from to landing pages to social media posts!

The difficulty of understanding what kind of content will "cover all of the bases" along the way is the reason why strong lead nurturing campaigns incorporate content mapping. In this process, content is designated to be received by leads at appropriate points throughout the campaign.

The distinctions between the top, middle, and bottom of the marketing funnel (ToFu, MoFu, BoFu) can be used to guide your content. Alternatively, you can implement certain content assets for stages of the sales cycle:

- **ToFu - Awareness**: Checklists, eBooks, whitepapers, instructional videos, and webinars
- **MoFu - Consideration**: Case studies, demo videos, and data sheets
- **BoFu - Decision**: Trials, demos, quotes, discounts, and consultations

5. A "Personal Touch" is Missing

While highly valuable, lead segments are not a total substitute for personalization. The two concepts may appear similar to one another, but in fact, they are quite distinct.

While segmentation attempts to organize a group of people by common traits or behaviors, personalized marketing leverages data collection and analysis to deliver individualized messages and is focused on the single user.

Having gained a considerable amount of insight into your leads, it can be tempting to sit back and let algorithms do the work. Yet leads respond well to and engage with a human touch in a marketing process that is often highly automated. That is why maintaining a degree of personalization matters so much.

Fortunately, there are numerous ways to incorporate personalization into your lead nurturing strategy, such as sending emails triggered by specific behaviors (which involves creating workflows, a set of automated actions triggered by certain events) and including leads' personal details in the body of the emails.

6. Untimely Follow-ups are Costing You Leads

One of the most common lead nurture challenges is creating a scheduling process through which you will send out content and get in touch with your leads. The odds of a lead becoming qualified are exponentially higher when contacted promptly after converting on your site.

In addition to automated scheduling, a timely follow-up email or a phone call can still often be an effective means of converting inbound leads into qualified sales opportunities. Testing out various time intervals with your various lead segments and gauging their effectiveness is the best way to find a strategy that works for your company.

7. You're Unsure of How to Report and Analyze Your Results

From the software required to the indicators which are best to focus on, reporting and analytics can be challenging even for a seasoned marketer. Yet the “scientific process” is crucial to success, as an understanding of strengths and weaknesses will enable you to optimize it efficiently.

Thankfully, there is a multitude of resources available to present an idea of which metrics matter most, and a large portion of the work can be done through the push of a button (or rather, a click of the mouse). Standard digital marketing software will most often include tracking and analytics features, easily lining up key metrics such as:

- Click-through and site/Content engagement rates
- Conversion rates
- Cost per customer acquisition
- Average conversion time

Benefits Of Lead Nurturing For B2B

Not a B2B marketer? Skip this section to read the Benefits of Lead Nurturing for B2C section.

B2B marketing strategy is “in it for the long haul”, since it needs to be oriented towards longer sales cycles. On the positive side, this creates opportunities to cultivate deeper, more meaningful relationships. The main goal of B2B marketers is to provide value and education to leads that remains broadly applicable to a wide range of recipients.

Shortens the Sale Cycle

A major function of lead nurturing for B2B marketing is accelerating the sales cycle where it most needs it. Through tactics like testing, automating workflows, segmentation of leads, and increasing your number of marketing channels, a nurturing campaign will make the most of the high turnover in value that B2B customers have to offer.

Workflows are exemplified by drip marketing campaigns that encourage a lead to access the next content piece in your funnel or take the next desired action. Equally important are the roles of predictive analytics and A/B testing, which can accelerate the sales cycle by optimizing everything from landing pages to email subject lines to offers themselves.

Helps You Approach Leads in a Timely Manner

Developing a personal relationship with leads is even more important for B2B than B2C nurturing, as it is forged between the individual marketer and the buyer (in contrast with B2C, which tries to create a relationship between the buyer and brand).

This begins with knowing how to act quickly without coming on too strong and intimidating the lead. Aforementioned elements of lead nurturing, like segmentation and predictive analytics, can make these efforts better-informed and more efficient.

Delivers Relevant Content to Your Database

Some 80% of B2B marketers say they personalize emails, and 50% say they personalize web experiences. Premium content helps you make a case for why your solution in particular is the best fit to a lead's problem during the consideration phase of the buyer's journey. And the more specific, personalized solutions of B2B require more specific content delivered through flexible drip campaigns.

Several pieces of content may be required at this stage, especially given B2B's longer sales cycles and more complicated products/services. Successful pieces include case studies, whitepapers, eBooks, and webinars—however, even the copy content of landing pages and CTAs should not be overlooked. The format may not even be entirely digital. The portion of a B2B nurturing campaign conducted online is smaller relative to a B2C campaign.

Benefits Of Lead Nurturing For B2C

B2C or eCommerce marketing tends to deal with large customer databases and shorter sales cycles, creating a strong need for a means of managing leads' potentially fickle behavior. Most importantly, the company needs to be able to act fast and deliver offers as directly as possible! This is why the nurturing campaign funnel is usually based on an intricate email series.

Increases Customer Lifetime Value (LTV)

One major difference in B2C from B2B is that the former continue to be targets for marketing even upon becoming a customer. In other words, the higher likelihood of repurchases keeps leads potentially exiting and re-entering the middle-of-funnel phase continuously.

Lead nurturing addresses this to increase average customer lifetime value by jumping right back in after the closing of a sale with the next relevant loyalty reward, upsell, or cross-sell product offer. Emails can also be utilized to gently nudge a lead back on track if they have abandoned a purchase during the checkout process or failed to take advantage of an offer.

Personalized Offers for a Large Database

B2C pieces provide value in a more straightforward way than B2B offerings (which often focus on education and information), standing out via discounts, promotions, bundles, rewards programs, etc. For that reason, they must on one hand be simpler in design because their value is not subjective like that of a content offer. On the other hand, nurturing ensures that offers are still relevant and generous enough to fit the customers' needs and wishes.

Prevents Database Decay

While emails are at the core of B2C nurturing campaigns, keeping leads and current customers consistently engaged requires a larger number of engagement channels than in B2B marketing. The brand is expected to reach the customer at the channel that is most convenient to them at a given point in time, whether it be through email, social channels, or even over text.

This necessitates a strong marketing automation system to be implemented to juggle all of the channels involved, with automated workflows that allows marketers to plan ahead and create regular content and offer calendars to stay top-of-mind with the entirety of the database.

Delivers Your Brand Image

Finally, lead nurturing for B2C helps with the all-important goal of delivering your brand to leads. Nurturing content is a great way to share in depth your company's values, story, and the message that what it has to offer is unique.

Lead Nurturing Statistics

Still not seeing the full potential of a lead nurturing strategy? Here are a few of the latest quick stats on lead nurturing:

- 96% of visitors who come to your website aren't ready to buy, and around half of the leads in any system are not yet ready to buy
- 48% of businesses say most of their leads require "long cycle" nurturing
- 64% of marketers say they saw the benefits of using marketing automation for nurturing within just six months after implementing it
- 67% of B2B marketers say they see at least a 10% increase in sales opportunities through lead nurturing, with 15% seeing opportunities increase by 30% or more
- Companies that excel at lead nurturing generate 50% more sales-ready leads at 66% of the cost!
- Lead nurturing emails get 4-10 times the response rate compared to standalone email blasts

Drip Marketing vs. Lead Nurturing

When it comes to lead nurturing terminology, there often exists some confusion about a lead nurturing campaign's relation to a drip marketing campaign. So, are these two the same thing? Is one a subcomponent of the other? Or, can both be implemented at the same time?

Let's take the time to define and distinguish the two terms.

Email Drip Marketing

A type of automated campaign which allows you to send out a series of scheduled emails to your contacts base. Generating open rates that are around 80% higher and click-through rates that are three times higher than those of single send emails, drip emails are a more sophisticated and effective investment than blast emails.

Email drip campaigns work well when you need to educate leads on all your company has to offer, inform them of updates, and continually keep your brand top of mind. Drip marketing is essentially a subsection of the lead nurturing process, as it is designed to educate customers and guide them down the sales funnel towards conversion.

In a drip marketing campaign, all of your leads in your segment will receive the same content, at the same cadence. For example, Lead #1 and Lead #2 will receive the second communication in your series 10 days after receiving the first, regardless of their actions.

Standalone drip campaigns may be an advantageous choice for younger companies and less experienced marketers, because they are easier to set up and maintain. However, they do not dig deep enough below the surface to examine the underlying behavioral patterns your leads follow.

Nurturing Campaign

A full-fledged, multi-channel campaign, incorporating, but not limited, to automated email campaigns. A lead nurturing campaign delivers timely and targeted premium educational content that help guide the lead toward a purchase, as well as the tangible offers that make up the heart of the campaign.

Unlike drip marketing, nurture campaigns are triggered by every engaging action the marketer deems relevant, creating a far more personalized sending schedule. They are informed by in-depth analytics and behavioral data based on criteria such as email open rates, purchase histories, and site browsing paths.

Nurturing campaigns are a much more advanced option for relationship building with prospects; though they require greater investment of time and effort, they keep longer-term goals in their line of sight and deliver greater payoff.

Feel like you have a better understanding of what lead nurturing is and its benefits? Take your learning to the next level by applying your knowledge in the *Lesson 1 Exercise* below.

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Lesson 1 Exercise

Evaluate Your Lead Nurturing Strategy

Determine if your Lead Nurturing Strategy needs help by reviewing each statement below and checking off each item on the list that currently applies to your company's marketing strategy.

- ❏ Our database is segmented by stage of the buyer's journey.
- ❏ We have documented buyer personas (a.k.a., avatars).
- ❏ We use email for more than sending un-automated, unsegmented single blasts.
- ❏ We have content that covers every stage of the buyer's journey.
- ❏ We use personalization to deliver individualized messages to our leads.
- ❏ We have an email or marketing automation platform.
- ❏ When a lead converts on our site, they are followed up with immediately using automation.
- ❏ We know how to analyze and report on our key performance metrics.
- ❏ For B2B—My sales team is pleased overall with the quality of leads they receive from marketing.
- ❏ For B2C—We have a high rate of return customers.

If you could not check all of these boxes, then this masterclass is for you!

Now that you know what lead nurturing is (and isn't) and its benefits, it's time to learn how to execute lead nurturing for your company in *Lesson 2*.

LESSON 2: THE LEAD NURTURING PROCESS

Welcome back to the Lead Nurturing Masterclass! In this lesson, we will be getting into the meat of the nurturing process, including the “why”, “who”, and the “how”.

In this lesson:

1. Goal Setting
2. Deciding Who to Nurture
3. Lead Scoring
4. Keeping Your Database Clean and Up to Date
5. Mapping the Buyer's Journey

Goal Setting

The foundation of a good lead nurturing process begins with deciding what kinds of goals should be set for your campaigns. Goals can be divided into two primary kinds.

Quantitative Goals

The most straightforward and easy to track, quantitative goals are numerically measurable. Quantitative metrics provide stepping stones on the path to measuring your success in an objective way, and can help with scaling lead nurturing efforts in the future.

Potential quantitative goals to consider include:

- Accelerating the sales cycle
- Increasing average customer lifetime value
- Improving conversion rate of leads to prospects
- Improving conversion rate of prospects to closed deals
- Reducing the number of leads rejected monthly by the sales team
- Increasing the rate of upsells and cross-sells with existing customers

These goals can be formulated as precise numbers, but it’s more reasonable to express them as percentages, to allow them to grow alongside the company and its database.

Qualitative Goals

While more general than quantitative goals, qualitative goals are important to incorporate into your strategy, as well—they aim to remind you of the bigger picture. Examples of such objectives include:

- Better organizing and maintaining your lead database
- Allocating more attention/effort towards turning cold leads into warmer ones
- Engaging in more personal relationships and building greater trust with your prospects and buyers
- Collecting information from leads more efficiently
- Better collaborating with the sales team on defining qualified leads

To get an idea of what to base these goals on, it can be helpful to begin with a few analytical questions, including:

- What is the range of the products/services that your company offers? Industry benchmarks as well as historical data specific to your company (such as sale cycle patterns) can affect the expectations that should be set in major ways. The number of tracks in your lead nurturing program will rely on the diversity of offerings.
- How many leads do you generate currently? The scale of leads should determine the scale of the lead nurturing program, as well as the number of nurture segments created and the rigor of the nurturing schedule. Crucially, understanding what percentages of leads are "warm" (sales ready) when they enter your database allows you to measure current ROI.
- What are the main sources of those leads? This will help you decide what types of tracks to create and how to allocate efforts wisely.
- What are some major demographic and behavioral trends that can be observed among your leads? The earlier you can begin finding characteristics to organize leads into groups for buyer persona development, the better.
- What does your current nurturing process look like? How are leads responded to, distributed, and managed today? Assessing existing strengths and weaknesses early on is crucial; no nurturing strategy is built entirely from scratch. Direct feedback from

sales and marketing teams will provide insight, along with running a data-based report with your marketing software.

Deciding Who To Nurture

Now that you've determined the goals that you would like to pursue with your lead nurturing campaign, it is time to focus on understanding and organizing the leads themselves.

Buyer Persona Development

Buyer personas are fictional, generalized representations of our ideal customers—their needs, pain points, goals, behavioral patterns, and demographics. They are based both on market research and company-collected data.

Personas play a crucial role in lead nurturing as they help us understand our customers (and prospective customers) better, and make it easier for us to tailor content to the specific needs, behaviors, and concerns of different types of buyers.

Buyers with the same persona face similar challenges (that you can help them solve), have similar goals (that you can help them meet), and similar objections to your product or service (that you will help them overcome). When creating your personas, think less about their demographics, at least at first, and more about their pain points.

Building buyer personas from scratch may seem overwhelming, but the process can be made simpler when broken down into a few key steps.

1. Starting Your Persona Research

Your final persona output will consist of several different subcategories. Challenges, common objections, demographic information, and marketing messaging are all common. But, it is important to learn who your personas are before labeling them with demographics.

You may think you've already got your ideal customers nailed down, but it's certainly worth conducting a review. Engage with audiences relevant to your industry as well as those common to your company—webinars, newsletters, even a strategic Google keyword search can be good ways of obtaining information.

If your company is already fairly well-established, it is recommended to supplement these efforts with direct interviews with your current or former customers. They will eliminate much of the need for guesswork and extrapolation by providing information first-hand.

Additionally, while it is not necessary to ask for a one-on-one session with the entire database of buyers, it may be worthwhile to look into data that has been previously gathered through social media or surveys.

2. Psychographics: Challenges, Pain Points, a Day in the Life

Now it is time to conduct an analysis of your personas and their motivations. Consider what your personas may go through on a daily basis, and detail their behavioral tendencies around your product/service. There should be an initial consideration of why each of your personas need your product/services, and how they developed their need in the first place. List out why your persona would even be open to using them.

Additionally, take time to pinpoint their complaints and “pain points”, which will provide insight into why they have been unable to solve their problem through other sources. This will allow you to offer the most relevant arguments for why your business can offer the solution they need.

In summary, to develop your persona's psychographic profile ask the following questions:

1. What are the persona's pain points? In other words, what problems do you help them solve?
2. What goals do your products or services help them meet? In other words, what do they have to gain from your product/services?
3. What do they value most in life?
4. What are their life goals?
5. What are their interests/how do they spend their time?
6. What are their dislikes?
7. What are their most common objections to your product or service?

If this is a B2B persona you will want to answer additional questions specific to the workplace such as:

1. What are their responsibilities at work?
2. What are their goals at work?

3. How is their job performance measured?
4. What are their biggest internal challenges?
5. What are their biggest external challenges?

3. Segmenting by Demographics

Once you've determined your persona's challenges and common objections, you can outline their demographic information. This is typically the most straightforward and basic information that comes with each persona: their age, location, job title, salary, marital status, and any other straightforward details.

4. Deciding How Many Personas to Construct

There is no concrete number that will work for every business. Using fewer personas is often easier as it allows a more concise brand message. On the other hand, this reduces capacity for personalization. While it is impossible to be everything to everyone, creating a hierarchy of personas may be helpful. If you have a long list of personas, try to begin with what you consider to be your three most important personas, and then add more as needed over time.

5. Negative Personas

After your personas have been fleshed out, another kind of persona should be considered as a last step. Negative personas are potential customers that your company should look to avoid. Over the life of any business, it will become more and more apparent who offers the highest lifetime value to your company and who should probably be avoided in the future.

List Building (Lead Generation)

While this series is dedicated primarily to lead nurturing and not lead generation, it must be noted that an underlying requirement for implementing a nurturing process is to have a substantial database of leads. List building refers to the development and maintenance of this database.

The four components of the lead generation process are:

1. A visitor has discovered your business through one of your marketing channels, whether that's your website, blog, or social media page. On these channels, you'll need to have a customized call to action (CTA). A CTA is an image, button, or message that

calls visitors to take some sort of action. When it comes to lead generation, this action is to navigate to a landing page.

2. A landing page is a web page a visitor lands on for a distinct purpose. While a landing page can be used for various reasons, one of its most frequent uses is to capture leads through a form.
3. Forms are hosted on landing pages. They consist of a series of fields that collect information in exchange for an offer.
4. An offer is the content or something of value that's being offered on the landing page. The offer must have enough value to a visitor to merit providing their personal information in exchange for it.

After clicking the final submit button on the form, the visitor has successfully become a lead for your business or organization. Once you put all these elements together, you can use your various promotional channels to link and drive traffic to the landing page so you can start generating leads.

Places To Promote Your Marketing Offers For Lead Generation

1. **On Website Pages**: Link to your landing pages on various pages of your website through CTAs. Try to align the offer you link to with the goals of that page.
2. **On Your Blog**: Just about every blog post you publish should have an opportunity to include a CTA. Again, try to align the content of the offer with the content of the blog post as best as you can in order to increase click-throughs.
3. **In an Email Signature**: This will be particularly effective for your business's sales team. Encourage them to add a brief text-based call to action at the end of their email signature to help nurture prospects with whom they're communicating, using more offers of free content in exchange for more information.
4. **On Social Media**: Sharing links to your offers' landing pages is the main way you can use social media for lead generation. Use the space that the specific social network allows to describe the value that fans and followers will get out of the offer.
5. **Within Press Releases**: If your business uses news releases as a way to promote information about your business, don't overlook the opportunity they provide for lead

generation. Just as you'd use anchor text (text that is visible and clickable in a hyperlink) in a blog post to point to a landing page, do the same in your news releases.

6. **In PPC Campaigns**: If you're using pay-per-click (PPC) as a way to complement your organic SEO efforts, think of your PPC ads as simply CTAs for your offers. Follow best practices for creating calls-to-actions, and you'll enjoy better click-through rates and more leads from your PPC campaigns as well.

Sales and Marketing Alignment

Sales and marketing alignment is becoming increasingly more important. The buyer's journey has evolved so that the sales portion of the journey comes much later than it used to. Studies have shown that up to 70% of a lead's purchase decision has been made before they even come in contact with a salesperson.

There is, in fact, a distinction between a marketing and sales buyer persona. Marketing personas need to be created for marketing activities, and sales personas for sales activities—however, both can learn from the other.

As an example, imagine that you are in middle management for a company looking for project management software. Your CEO tasks you to find multiple different solutions for you to present to him to make a decision. In this case, you embody the marketing persona, and your CEO is the sales persona.

Lead Scoring

You've probably heard of lead scoring before, but let's briefly review the definition.

Lead scoring is a customizable, rule-based system for ranking leads to distinguish which ones are cold, lukewarm, or red hot.

This provides your marketing and sales teams with a better idea of where to focus their efforts. ("Hotter" leads are close to converting, while "colder" ones require further nurturing or are unprepared/unqualified to make a purchase decision at the current time). The challenge lies in determining the guidelines necessary for your personal system.

Now, we will delve into the essential framework of a successful lead scoring model. You'll likely notice that there are some similarities in approach between lead scoring and building buyer personas!

Implicit and Explicit Criteria

By taking both implicit and explicit criteria into account, you can get a well-rounded picture of the types of leads that stand out from the pool of candidates.

Explicit scoring involves using the information directly shared by a lead to gauge their level of qualification, for instance, information provided on a landing page form by a site visitor. Demographics often tie into this—profession, company size, initial contact source, etc.

Implicit scoring, on the other hand, is based on tracking the activity that drives a lead towards a sale to infer the lead's level of interest. In the modern marketing world, both the behavior and its tracking is primarily digital—typical tracked actions include most visited pages, emails opens, shared posts, and downloaded content.

Tiered Behavioral Scoring

The main function of an automated lead scoring model is to assign varying degrees of importance to actions that your leads take. The best way to start organizing these criteria is by compiling a full list of relevant lead behavior across different categories, which can include:

- Your website
- Email campaigns
- Info forms
- Downloadable content
- In-person events
- Webinars
- Direct interaction with company representatives

The next step is trickier—the actions in each category must be ranked by order of importance and assigned fitting point values. Is opening an email as significant as clicking through it on a link? Is visiting the home page of your company's site as important as approaching your booth at a trade show? Take time to think through the options.

Another aspect of behavioral lead qualification is distinguishing between global and local scoring. Lead scoring on a global level means that the same criteria is applied to every lead, on every occasion.

However, in cases where you are interested in looking into a particular lead more closely or collecting data on a more specific level, like the interactive content medium, it can be necessary to create separate scoring rules at the local, or campaign-specific level.

Demographic Scoring

Demographic lead qualification is based on the lead's identity rather than their behavior; while a static and thus less sophisticated element of your model, it is still essential and should not be overlooked. Relevant demographic criteria are details, such as:

- The lead's country of origin
- Industry
- Position
- Company size and type
- Revenue

When deciding what effect a particular demographic feature will have on the lead's score, it can be helpful to consult your buyer personas to understand the general profile of the person or business you would consider a good fit.

Negative Scoring and Degradation

While it is good to think positive and focus on making qualified leads' scores higher, not being discriminatory enough can result in an overall decrease in the quality of leads being marked as “qualified”. For this reason, it is important to implement negative lead scoring, which deducts points when leads meet certain disqualifying criteria.

From a demographic standpoint, for example, this can mean that the lead is in an unfitting industry or holds an unfavorable position (e.g., an associate-level employee rather than a decision maker). With behavioral criteria, points can be taken off for actions like the lead moving your company's emails to spam, or even putting a personal email address into your landing page form instead of a professional one.

Similarly, rules should be established for the degradation of a lead's score over a period of time if their behavior stagnates. This is not meant to be a punishment—if your prospect isn't interacting with your company, knowing when (or whether) to try to re-engage them is simply strategic.

Cooperation Between Marketing and Sales Teams

Finally, aligning the goals of your sales and marketing teams is imperative to creating a great lead qualification system. Sales should be involved in the process of establishing scoring criteria, and their opinion can be a valuable contribution to your definition of a "good" lead.

46% of B2B marketers have not set up a lead scoring threshold that will automatically alert or route leads to sales. This means that the handoff process is not streamlined, and is eating up precious time and resources for all involved. The solution? Collaborate to establish a threshold that your sales team has agreed upon, to ensure that leads are getting assigned properly.

Other Important Lead Scoring Elements

Using Automation for Lead Scoring

An automated lead scoring system automates all the processes we've just discussed and organizes them under a scaled points system. This can be achieved by connecting a lead scoring platform with something like a customer relationship management (CRM) platform.

Predictive Lead Scoring

Predictive lead scoring is a tool that uses an algorithm to predict who in your database is qualified or not qualified. Developing a consistent formula can be really difficult for many marketers, and often requires a lengthy testing process.

A predetermined algorithm, on the other hand, examines what information your customers have in common, as well as what information your leads that did not close have in common, then generates a formula automatically that attempts to predict future behavior. The information taken into account and the general construction of the algorithm depends on the specific provider.

Keeping Your Database Clean/Up To Date

Maintaining and regularly updating your lead database, which is most commonly stored and managed by a CRM, is imperative for ensuring that a nurturing strategy will continue to run smoothly. The process may seem tedious, but luckily, technology will be on your side when it comes to organizational and cleaning efforts (yet another reason why quality software is a worthwhile investment).

Let's review several key best practices for maintaining a clean database.

Determine Data Fields

Decisions about which data fields to include and prioritize can matter more than you think. When determining which data should be mandatory for a sufficiently insightful contact record, it is important to consider pieces of information such as source and number of contact channels (e.g. email, phone number, etc.).

Ideally, every entry's data fields should be fully complete. Remember to match these fields with the information requested by your lead capture forms, or to complete them gradually over the course of the relationship with a lead. In the case of manual data entry—as via phone conversation with a prospect—those collecting the data should know what to ask for first.

Check for Errors

Whether manual or automatic, mistakes are bound to occur in data entry on the ends of both leads and marketers. This is when a scrupulous pair of eyes becomes necessary to detect typographical issues, duplicate records, etc.

It is recommended to merge duplicate records in order to prevent data loss and avoid hassle in distinguishing which record contains the most up-to-date information. Additionally, make sure data is updated routinely—outdated information can cost valuable time later on, and businesses and individuals relocate or change contact information more often than you may think.

Don't be Afraid to Remove Contacts

In certain cases, it's better to remove contacts than to keep them in the database. Entries that are missing crucial information, such as an email address or any other means of contacting the lead, are all but useless for marketing campaigns.

There are also leads that require more difficult decisions to be made; specifically, chronic email bounces and leads that have become inactive. Inactive leads are generally defined as not having interacted with your company for a determined period of time via site, emails, forms, or any other means of communication.

Unresponsive contacts can sabotage the accuracy of your email tracking and reporting—however, it is up to your judgment to determine the length of an inactive period that merits removing a lead from your base. For instance, leads that were created within a certain timeframe (say, a year or half a year or “x” months) have had ample time to become active.

Additionally, you may at times need to apply a case-by-case approach to decide whether a lead is worth a re-engagement attempt or should simply be let go. B2B leads generally tend to require more invested effort, so it it wise to consider whether it is worth salvaging the relationship your company put a considerable amount of work into establishing.

Track Lead Source

Understanding where leads are entering the database allows you to hone in on the approach with them with the right strategy. Organically sourced leads differ from those added from imported lists—leads who filled out a site form have a different exposure to your business than those who engaged in conversation directly with a representative. Tracking lead source provides insight into leads' identities and objectives, and facilitates a connection back to your buyer personas.

Mapping Out The Buyer's Journey

The buyer’s journey is typically a three-step process that aligns with the stages of your sales funnel. As a marketer, there is a good chance you have already studied it in the past! However, sometimes it is necessary to go back to basics in order to better keep existing frameworks in mind when fleshing out your lead nurturing strategy. As a refresher, the buyer's journey consists of the following stages:

ToFu: The Awareness Stage

At the top of the funnel, or ToFu, is the Awareness stage. This is where people are looking for answers, resources, and insight on a problem they are trying to solve, an answer they are seeking, or a goal they want met.

Some questions to ask in order to better understand the Awareness stage include:

1. How do buyers describe this goal or pain point? (in their words; it may not be how you refer to it internally)
2. What are the top causes for this pain point or reasons this goal is not being met?
3. What does your buyer have to gain if this pain point is addressed or goal is met?
4. What are the consequences of inaction by the buyer?
5. Are there common misconceptions buyers have about addressing the goal or challenge? (where might there be push back)
6. How do buyers decide whether the goal or challenge should be prioritized?
7. How do buyers educate themselves on this goal or challenge? (where do they look for information; what types or formats of information speak to them)

MoFu: The Consideration Phase

At the middle of funnel, or MoFu, is the Consideration stage. This is where people are considering the possible solutions for their problem or ways to meet their goal. And once they have determined the best solution, they begin an evaluation of the providers of those solutions.

Questions for assessing the Consideration stage for your buyer:

1. What categories of solutions do buyers investigate?
2. How do buyers educate themselves on the various categories?
3. How do buyers perceive the pros and cons of each category?
4. How do buyers decide which category is right for them?

BoFu: The Decision Phase

At the bottom of funnel, or BoFu, is the Decision stage. This is where people are making an actual purchase decision. Your potential customer has chosen the category of solutions to address their problem or goal (the “what”), but they need to determine which one (the “who”) can best provide that solution.

Questions you should ask yourself to define the Decision stage include:

1. What criteria do buyers use to evaluate the available offerings?
2. When buyers investigate your company’s offering, what do they like about it compared to alternatives? What concerns do they have with your offering?
3. Who needs to be involved in the decision? For each person involved, how does their perspective on the decision differ?
4. Do buyers have expectations around trying the offering before they purchase it?
5. Outside of purchasing, do buyers need to make additional preparations, such as implementation plans or training strategies?

Feel like you have a better understanding of the lead nurturing process? Take your learning to the next level by applying your knowledge in the *Lesson 2 Exercise* below.

Lesson 2 Exercise

Part 1: Create Your Buyer Personas

If you do not have documented buyer personas, that is the first place to start. Using the framework in the section *Buyer Persona Development* create your top 1-3 most important buyer personas. Remember, the most pertinent information to include in a persona profile is their pain points, goals, values, and common objections—not their demographics.

Part 2: Map Out Your Buyer’s Journey

Now that you know who your buyer personas are, you need to document their journey. Choose one of your buyer persona’s and map out the buyer’s journey for a product or service that solves their pain point. To do this, refer to the section Mapping Out the Buyer’s Journey and answer the series of questions listed for each stage: awareness, consideration, and decision.

Now the goal of your lead nurturing strategy is to guide your potential buyer through these stages. To do this effectively and efficiently you will need to invest in a marketing automation software. Which lucky for you, is the subject of *Lesson 3*.

CAMPAIGN CREATORS

LESSON 3: MARKETING AUTOMATION FOR LEAD NURTURING

Welcome back to the Lead Nurturing Masterclass! In this lesson, we will be discussing the important role marketing automation plays in the lead nurturing process.

In this lesson:

1. Why You Need Marketing Automation Software
2. MAS vs. Email Automation
3. Automation Software Providers
4. How to Choose the Right Software for You
5. Using HubSpot for Lead Nurturing

Why You Need Marketing Automation Software

With around 49% of companies and 55% of B2B businesses currently using marketing automation, the demand for automation software has been growing at an impressive rate over the past several years. And this should come as no surprise. As leads expect more consistent contact, more personalized content and offers, more "humanized" experiences, automation—paradoxical though it may seem—can help marketers to deliver it.

6 Signs that You Can Benefit from Automation

So, how do you know when your company is ready to embrace and reap the benefits of an automation software? Here are some tell-tale signs.

1. You're consumed by manual, repetitive, inefficient tasks.

Rather than focusing on new strategic initiatives, you spend your time building lists, managing leads, or creating emails and landing pages. And creating each new campaign is like reinventing the wheel. As a result, you spend entirely too much time carrying out tactical or reactive tasks.

Marketing automation programs decrease your workload, while increasing your output, by replacing repetitive work with automated rules and campaigns. Not only does this increase productivity and effectiveness, there's the added benefit of improved happiness that comes from varied creative work instead of mundane repetitive tasks. And after you build an automated campaign once, you can be sending out thousands of personalized emails each day on autopilot.

2. You're short-staffed or can't scale up.

Your list of to-do's seems never-ending, yet there is no room in the budget to scale up your team, and there are still only 24 hours in a day.

Using marketing automation software, one employee can compete with a 50-person marketing and sales department by setting up lead nurturing and marketing campaigns that are automatically triggered based on predetermined criteria.

3. Your competition is gaining on you.

Your marketing efforts are dwarfed by the campaigns coming from your competitor each week, and you just can't seem to keep up with their level of online presence. If this sounds familiar, your competition has a not-so-secret weapon: marketing automation!

It's easier to launch campaigns that cover multiple channels when the option to post to all accounts is one click away and lead nurturing is triggered automatically.

4. You don't know how to display your success.

Your marketing team works just as many hours as your company's other departments, but sadly you've got nothing to show for it. Your executives want to see how your work is converting, but you honestly don't know. If this sounds like a page out of your diary, then it's time to integrate marketing automation programs into your workflow.

Marketing automation systems can track everything from the effect of SEO effort on increasing traffic to your email marketing conversion rates to the effects of social media on revenue, so that when it comes time to present the final report, you've got data to share. In fact, many programs offer printable reports that collect numbers from all aspects of your marketing ecosystem and organize them into a single readable document.

5. You use too many marketing tools.

You sign into to one system to send your emails, another to schedule social media posts, and yet another to tracks your sales pipeline. Using several tools that don't integrate, are costly, require expertise, or are difficult to maintain, is not worth your time.

Using a marketing automation tool will allow you to cut down on cost by integrating your tools into one platform, saving you from wasting time and effort switching between 10 tabs and repeating work.

6. You spray and pray with your marketing.

You send email blasts to everyone on your database because you don't have the time to create targeted campaigns. If you have tons and tons of names on file, but no way to organize or sort them, then most of your sent content is probably reaching the wrong audience. Your customers aren't all looking for the same things for the same reasons, so they shouldn't be marketed to in the same way.

Marketing automation programs can separate your contacts into segmented lists based on gender, job title, recent interactions, and more. Lists make it extremely easy to send tailored content or offers to leads based on shared qualities, so that your content hits the right mark.

Marketing automation programs also allow you to target contacts based upon their position in the buyer's journey, so that repeat customers aren't tempted to unsubscribe after being emailed surface-level offerings for 2 weeks straight. These programs will help your strategy become more intuitive and efficient, so that you can get the right point across to the right people without hours and hours of research.

Benefits of Email Automation

There are additional advantages unique to automating your email campaigns, a major component of a nurturing strategy. Drip email campaigns not only automate the process of sending emails, but also allow emails to be tailored to people at different stages of the buyer's journey. Other major benefits include:

- Personalization opportunities in email content
- Long-term planning for campaigns with automated scheduling
- Low-hassle revision and continuous improvement through access to testing

- Maintenance of clean and well-segmented lists
- Boosts in traffic to the company website and even SEO
- More time and resources for the marketing team to devote elsewhere

MAS vs. Email Automation

Before we continue, let's take a moment to distinguish between MAS and email automation, two distinct terms within the sphere of lead nurturing automation.

Marketing Automation Software (MAS)

In *Lesson 1*, we explored the difference between drip marketing and lead nurturing. Similarly to how nurturing campaigns are a more advanced option for relationship building with prospects than email drip marketing campaigns, marketing automation software can accomplish a broader range of tasks than email automation. MAS features are related to many different elements of your lead nurturing process, such as:

- Advanced automated lead segmentation
- Implementing a lead scoring model
- Automated workflows for a variety of nurturing scenarios
- Mapping customer journeys
- Scheduling for social media, SMS, and other forms of customer messaging
- Analytics and reporting on KPIs

Most MAS also incorporate email automation features, though email automation is also offered by standalone software.

Email Automation Software

Email automation software is a crucial tool for marketers seeking to level up their drip email campaigns. With every $1 spent on email marketing producing an average ROI of $38, automation in this area is definitely a worthwhile investment. This software can serve a wide range of purposes, with common features including:

- A dashboard with analytics and a live component

- Contact database organization and segmentation
- Email flows with action-triggered or manual scheduling and/or segmented sending to portions of your contact base
- Templates designed to fit various kinds of emails for different campaigns and stages within a campaign
- A/B testing capabilities and reporting on the performance of an email campaign (with metrics such as delivery, open, bounce, and click-through rates)
- Customization options that utilize information from contact records

Automation Software Providers

Given the growing market for automation, there is an abundance of software providers available to fit companies of all sizes, industries, etc. Some of the leading names in the field include HubSpot, Pardot, Marketo and Klaviyo. Their products provide a great overview of the wide range of capabilities and specializations that automation software is capable of delivering to fit your business's unique needs. Let's examine them in greater detail.

HubSpot

HubSpot is a bit of a powerhouse in the marketing software world, offering a tiered set of three distinct automation products: Starter, Pro, and Enterprise. Of these, Pro and Enterprise focus on lead nurturing as one of their primary functions, while the Starter software is designed primarily around lead generation and management.

The products are designed with variably complex features and to accommodate a variety of database sizes. While Starter is best for startups and small B2B companies, Pro and Enterprise suit small-to-mid-size and mid-size-to-large companies respectively, as well as small to midsize B2C companies with complicated products or longer sales cycles.

In relation to lead nurturing, HubSpot Starter offers features such as:

- Email marketing, mobile email, and personalization
- Lead qualification bots
- Segmentation
- Optimization
- Prospect tracking

The Starter software includes additional features including:

- Advanced segmentation
- Advanced analytics
- Blog and content creation
- Goal-based nurturing
- Manual lead scoring
- Dynamic content
- Video hosting and management

Finally, the Pro product includes all of these as well as:

- Contacts reporting
- Company reporting
- Email frequency safeguards
- Event-based segmentation
- Predictive lead scoring

The HubSpot automation products range between 113 to $3,600 monthly as a base price. It should be noted that they tend to be well-rounded, providing tools to automate other processes like lead generation, sales, customer service, and even lead management in tandem with the lead nurturing features.

Pardot

Pardot's software is best for small to large B2B companies. With its features mainly focused on lead nurturing and lead generation, it is less multifaceted than HubSpot in its offerings, but still a long contender in its field.

Top features include:

- Advanced email analytics
- Advanced segmentation
- Email automation
- Manual lead scoring

- Prospect tracking
- Email marketing and A/B testing
- Goal-based nurturing
- General automation
- Multi-touch attribution

As a stand-alone MAS, however, Pardot is really only advantageous to use if you are already a user of its proprietor's Salesforce CRM (Customer Relationship Management) software. It offers several plans ranging from $50 to $1250 monthly as a base price.

Klaviyo

Klaviyo primarily functions as an email automation software, aimed towards eCommerce companies. As such, its email-oriented features go into greater depth, focusing on areas such as:

- Email A/B testing
- Advanced segmentation
- Abandoned cart series and welcome email series
- Order follow-ups
- Email templates and drag-and-drop design
- Newsletters
- Triggered emails
- Product recommendations
- Custom fields and integrations
- Customer profiles
- Automated list imports
- Pre-built autoresponders
- ROI reporting
- Real-time tracking

Klaviyo's pricing model is based on the user's number of email contacts. This software is designed with email-heavy eCommerce companies in mind, offering email attribution reporting and micro-segmentation based on their store activities.

Marketo

Marketo offers automation as one of a variety of integratable engagement applications, and has been praised for its robust product options. With three versions for small and medium businesses and one version for large enterprises, the software is fairly flexible and an appropriate choice for medium-sized businesses.

The features offered in the automation tool specifically include:

- Personalized site content and experiences for target accounts
- Custom landing pages
- Automated email campaigns
- Email A/B testing
- Mobile in-app and push notifications
- Lead scoring and engagement tracking
- Sales dashboard with top leads (when connected with Marketo CRM)
- Outside CRM integration
- Program analytics

While the Engagement products integrate into one another to an extent, the full lineup of offerings focuses, in addition to automation, on areas such as:

- Account-based marketing
- Email, mobile, and social
- Web and digital ads
- Marketing analytics
- Content AI
- Marketo sales engage (sales and marketing coordination)

All of these tools are incorporated into the Engagement Marketing Platform, Marketo's powerhouse product. That being said, pricing is somewhat of a complicated matter, as five distinct bundles are available, and four tiers to choose from within two of these bundles! Pricing is primarily based on the number of contacts in your marketing database. The starting price estimate, however, is around $895 monthly.

CAMPAIGN CREATORS

How To Choose The Right Software For You

The sheer number of solutions available for marketing automation may seem overwhelming to any marketer! For companies looking to find the software that works best for their needs, there are several factors to prioritize during the deliberation process that will make it easier.

Company Size and Type

Some tools are highly scalable and designed to grow with their users; others are meant for companies that already have large-scale campaigns and a massive database in place. Still, others are limited to smaller businesses that may be focused on nurturing deeper relationships over long sales cycles with their clients. The differences between B2B and B2C lead nurturing that we covered in an earlier lesson are very much applicable when software shopping.

Primary Function

While our focus in this series is lead nurturing, it is wise to consider the range of other features that a particular software can offer—from lead generation to sales to customer service. Some marketers may seek a tool more narrowly specialized in one area, like email automation, while others will want to maximize the “bang for their buck” and take advantage of as many features as possible.

Pricing and Fees

Take the time to examine your candidates’ pricing models. Some companies offer tiered packages with varying features, and others price the same services based on the number of contacts/leads in your database. There are even freemium options on the market!

Some companies require subscription plans, and some go off of a month-to-month basis. In addition to monthly costs, it is worth taking note of set-up and onboarding fees, which can sometimes be avoided, depending on the complexity of the software. Which brings us to the next point.

Learning Curve and User-Friendliness

A steep learning curve can cost time and money, necessitating anything from browsing user forums to bringing a consultant on board for set up. It is important to take into account the willingness and capacity of your team to master the new software. In some cases, the only way to obtain honest information about UX is from external user reviews.

Resources and Support

A higher learning curve can be made more manageable with the right resources, in the form of educational tools and customer support. In some cases, only user-created community forums are available, but good providers should offer more direct assistance through phone and email support, live chat, or (usually for premium plans) strategy specialists dedicated to ongoing one-on-one communication with your company. Educational resources can include knowledge bases, webinars, training videos, and even certifications.

Integrations and Overall Flexibility

Integrations are a significant issue for companies with other software already in use. Synchronizing data and processes between multiple tools can be a nightmare if they are not designed to integrate smoothly. Flexibility, meanwhile, refers to the extent to which the software’s features can be personalized to fit a particular company’s needs. This can require additional skill sets such as HTML and CSS, and be limited by the focus of the platform or, conversely, its wide scope.

Using Hubspot For Lead Nurturing

If you are leaning towards choosing HubSpot for your marketing automation needs, you may want to better understand what the software and its large number of features can do for you. Let’s examine some of the lead nurturing-related functions described earlier in greater detail. If you are leaning towards choosing HubSpot for your marketing automation needs, you may want to better understand what the software and its large number of features can do for you. Let’s examine some of the lead nurturing-related functions described earlier in greater detail.

The HubSpot Workflow Tool

Successful marketing automation relies on triggering relevant and timely actions based on context. As a refresher, a workflow is a set of automated actions—such as sending an email/SMS message or adding a lead to a segmented list—triggered by certain events—such as filling out a form or adding an item to a digital shopping cart. Essentially, they are complex enough to serve as flowcharts keeping the nurturing process flowing smoothly.

HubSpot's workflows tool can be used to create various kinds of workflows, which can then be used to tie together the pieces of the nurturing campaign. Examples include workflows designed to trigger when a contact meets enrollment criteria (like filling out a certain piece of information on a form), or workflows with actions centered on a particular date (such as a conference or webinar), or date property relevant to the contact (such as their last purchase or contact with a representative).

There is a large list of enrollment triggers and goal criteria to choose from—these can be combined for more complex workflows. Once a contact has met a goal, they can be unenrolled from the workflow and moved on to the next stage of their buyer's journey.

Workflows also serve as the backbone for list segmentation, and manage both drip email series and lead nurturing emails (the difference between which we discussed in the first lesson). As such, emails can be scheduled, set to be delivered through specific triggers, or personalized through "if-then" branches.

Combined with other tools, like the email workplace and lead scoring, HubSpot workflows can take a lead from ToFu to BoFu, eventually delivering them as qualified MQLs/SQLs to your teams while ensuring your sales cycle maintains a good pace. Ideally, a lead nurturing-oriented campaign should integrate at least three workflows—a ToFu to MoFu transition, a MoFu to BoFu transition, and a BoFu to purchase or "breakup" transition.

HubSpot Emails

HubSpot provides an all-in-one workplace for email, providing a dashboard for sending, finding, and organizing emails (including by types and campaigns); importing and exporting various kinds of contact lists; A/B testing emails; and viewing analytics information like delivery rate, bounce rate, and spam reports, as well as general performance or engagement over time.

HubSpot content from other tools can also be integrated into emails, including CTAs and personalized tokens created from information from the contact database. Mailing lists can thus be segmented and personalized by content and offers.

Free and paid customizable templates are provided with a drag-and-drop interface, and mobile optimization can be tested before sending emails. Finally, emails can easily be scheduled to go out at a specified date and time, either manually or automatically using analytics that determine when prospects are most likely to engage.

HubSpot Score (a.k.a. Lead Scoring)

HubSpot's manual and predictive lead scoring features allows users to create smart lists of automatically qualified leads using selected scoring criteria. Multiple pieces of criteria can be incorporated into a single lead scoring rule, and negative as well as positive attributes can be specified. After choosing scoring criteria, you can create a smart list with the contacts who have a HubSpot Score greater than or equal to the goal score that you set.

Running a Lead Nurturing Campaign in HubSpot

Finally, HubSpot's campaign creation feature enables users to combine the other elements of your nurturing strategy, including CTAs, personas, offers, content, and emails, under a single campaign. Related marketing assets and content can be tagged accordingly, then tracked to measure the collective effectiveness of your campaign with all pieces accounted for.

Tracked metrics include the number of sessions, new contacts, influenced contacts, closed deals, and influenced revenue attributed to the campaign. (Naturally, the relevance of these metrics will vary depending on the type of campaign you are running). The Goals App can be used alongside campaign analytics to set and track progress towards marketing goals for an individual campaign as well as individual ones.

Feel like you have a better understanding of how to incorporate marketing automation into your lead nurturing strategy? Take your learning to the next level by applying your knowledge in the *Lesson 3 Exercise* below.

Lesson 3 Exercise

Choose the right automation software for you!

In order to choose the right platform for your company, answer the following questions:

1. What best describes your company type—B2B, B2C, or eCommerce?
2. What is your company size—Start-Up, Small, Mid-Size, or Large/Enterprise?
3. Besides lead/email nurturing, what additional functions would you like your platform to serve—Lead management (CRM), Lead generation, Sales, or Customer Service Management?

4. How much experience do you have working with marketing automation systems—None, very little, some experience, or extensive experience?
5. List the most important features you need your system to have (You can refer to the features listed in the section *Automation Software Providers*).
6. What technology do you need your new system to be able to communicate with (i.e., what integrations do you need)?
7. What level of customer support do you need?
8. How many contacts do you have in your current database?
9. What is your monthly budget for a marketing automation system?

Now use your answers to select the best platform that fits your needs and requirements *(*you can refer to the section *Automation Software Providers)*.

Congratulations! You have now evaluated and chosen the best automation system for you.

Once you have selected the right automation tool for your company, it's time to use it to execute your lead nurturing tactics. What tactics should you be using for lead nurturing? We lay them all out for you in *Lesson 4*.

LESSON 4: LEAD NURTURING TACTICS

Welcome back to the Lead Nurturing Masterclass! In this lesson, we'll dive into the specific tactics you can utilize to guide leads through their buyer's journey, from casual beginnings staged at the top of your funnel to being ready to purchase at the bottom of it.

In this lesson:

1. Using Your Website for Lead Nurturing
2. Retargeting for Lead Nurturing
3. Social Media for Lead Nurturing
4. Chatbots and Messaging Apps for Lead Nurturing
5. Direct Mail Lead Nurturing
6. Mobile Marketing for Lead Nurturing
7. Premium Educational Content for Lead Nurturing
8. Lead Nurturing Emails

Using Your Website For Lead Nurturing

How your business markets itself has changed a lot in the past 30 years. Companies once advertised using local newspapers, Yellow Pages, or corporate print runs. Now, they have a digital canvas at their ever-ready—"The Website". Pretty much anything a company can think of to splash on their websites these days—from embedded video to pages upon pages of text optimized for Google—is doable at high quality and reasonable cost.

Websites have become centerfold, replacing old channels and giving businesses a new front for advertising themselves. Additionally, websites offer you numerable more ways to connect with customers than seen previously. They're customizable and personable, optimizable for audiences' intent, and most importantly, they position your business as helpful and gives your target audience a guiding hand.

The matter of fact is your website can be a powerful tool for lead nurturing for several reasons including:

1. Customization and Personalization

In order to craft a lead nurturing website, you want to employ customization and personalization. Personalizing your website is about tailoring content, offers, communications, and any other elements of your website to your target audience. Speaking directly to your potential buyer's major pain points and offering targeted solutions positions you as a subject matter expert. Also, alongside the use of automation, you can design websites to provide leads personalized paths to follow on their buyer's journeys.

2. Zeroing in on Customer Signals and Conversion Triggers

Nothing need be left to chance in the web design process for businesses. You can use A/B split-testing to ensure, down to a granular level, that every element of your website is helping convert leads and increase your bottom line.

To effectively conduct an A/B test, create 2 near-identical pages with just one key difference. For example, testing a call to action by placing it in different locations on a webpage. Continuous testing allows you to zero in on and refine what's working and quickly discard anything that isn't performing optimally. You can also combine A/B testing with analytics software, such as HotJar, Tableau or Google Analytics, to identify behavioral triggers for customers (i.e., what aspect of a page triggers conversion).

3. Positioning Your Company as a Helpful, Friendly Face

When designing a website to nurture leads, take a subtle approach rather than a direct one. More often than not, your website visitors are at the top-of-the-funnel and early in their buyer's journey. At this stage, they often aren't ready to make a buying decision, particularly on more expensive goods or services, and have only just begun to identify their problem and search for a solution. So it's recommended that you use your website to position your company as a helpful, friendly face for customers.

If you do this effectively you pave the way for customers to do business, and perhaps more of it and at a higher price point, with you down the road. That's the goal of marketing, isn't it? To deliver not just more business, but better business.

Retargeting For Lead Nurturing

Upon a contact's first visit with your website, it's not imperative they be converted. In fact, research suggests that just 2% of prospective customers will convert at this point.

What's to be done about the other 98 percent? In a word: Retargeting.

What is Retargeting?

Retargeting is one of the finest stealth tools available to you in your lead nurturing efforts. If you do it effectively, retargeting can increase brand awareness and conversions. It's a low-cost way to increase return on investment (ROI) by recapturing lost leads and generating additional quality ones.

The process for retargeting is fairly simple and largely automated, via tools such as AdRoll, Retargeter, Google AdWords or, Perfect Audience. These and other retargeting tools place a small bit of code on a web page, so when a possible customer visits one of your website's pages, it captures and stores their internet protocol (IP) address.

When your prospective customer visits other websites, the space on these sites for banner or other display ads will highlight your ads, if you use retargeting software. There aren't limits for how often the prospects see retargeting ads, though top marketers generally recommend using safeguards to ensure the ads aren't shown more than 17-20 times a month.

Retargeting for B2C vs. B2B Lead Nurturing

Retargeting works for both B2C and B2B though the modus operandi varies. The biggest thing to remember when retargeting in B2C versus B2B is your audience. B2C audiences tend to engage in shorter sales cycles and B2B in longer sales cycles. So, adjust your retargeting efforts for such. Perhaps with B2C, you'll need to be more direct, and perhaps with B2B you'll need to employ more elaborate remarketing strategies.

Best Practices for Retargeting

The three key things to do when creating a retargeting campaign are:

1. Employ subtlety
2. Use segmentation

3. Avoid being an annoyance

Employ Subtlety

You should consider other factors beyond frequency when employing retargeting for lead nurturing. One of which is subtlety. Retargeting is about helping and educating, to propel consumers through their buyer's journey. Considering this, take into account what was said earlier about putting on a friendly, helpful face. Doing so, in regards to retargeting, will help you not appear overbearing nor pushy. For this reason, display ads on retargeting platforms are best executed with softer colors or calls-to-action.

Use Segmentation

Additionally, before you begin retargeting, you should choose whom you want to retarget, which is best done via automation, and audiences for your automated marketing processes to retarget is best chosen by utilizing segmentation. Use segmentation to determine who receives your retargeted ads based on age, geographic location, or other demographic factors, as well as contextual factors, such as contacts interacting more with conversion-oriented pages on your website than not.

Avoid Being an Annoyance

Lastly, implement "burn pixels" within your website's code to eliminate contacts whom became qualified-leads (or customers) so your retargeting efforts don't continue affecting them. After all, the last thing a company should do is annoy a BoFu lead who's ready to purchase.

And, as with all things related to digital marketing, conduct A/B testing for retargeting campaigns, too, to determine what's working and what isn't.

What is the Difference Between Retargeting and Remarketing?

Though you may have seen them used interchangeably they differ in focus and strategy. Retargeting primarily focuses on web-based ads, whereas remarketing revolves around re-engagement email campaigns for list subscribers. The two tend to primarily target different stages of the funnel. Retargeting generally tends to ToFu audiences, and remarketing targets BoFu audiences. Deciding on which to use depends on analyzing your buyer's intent—whether your audience is willing to purchase now or possibly later.

That said, the two strategies still complement each other if used side-by-side.

Social Media For Lead Nurturing

One key channel to focus on for nurturing leads is that of social media, where you can remain in regular, if not semi-constant, contact with prospective customers. While this strategy is most often accomplished via email, social media also provides a superb, non-obtrusive alternative. In fact, from 2016-2019, an average of 26% of Facebook and Twitter users made a purchase as a result of receiving marketing messages over these channels.

Benefits of Using Social Media for Lead Nurturing

It's important to have realistic expectations when using social media for lead nurturing since marketing over Facebook, Instagram, or Twitter won't necessarily be entire nurturing campaigns in and of themselves. Social media might not even drive a ton of sales at first, with click-through rates often notoriously unreliable or low. But on today's internet, where change happens at a sometimes-dizzying rate, social media can quickly begin to make a difference and nurture leads toward the bottom of the sales funnel.

Perhaps the best thing social media can do, similar to a well-executed company website, is humanize your business. Customers have a direct connection to your company via your social media portals. Your company can show that you care about anyone who engages with you; you can quickly respond to customer service issues and take corrective actions; and you can build relationships, nurturing possible new customers toward sales and helping upsell existing ones.

Tips for Using Social Media for Lead Nurturing

1. Utilize your employee's social media accounts.

Customers today demand transparency from businesses, and this includes on social media. Whether you're an enterprise company or a small local business, your prospects expect to be able to connect with actual people online. One way to meet this need is by encouraging your employees to be active on social media and share your lead nurturing content to amplify your reach. Posting through employee accounts also capitalizes on the social media algorithms' reference for posts from people over companies.

To put a face to your company and make it as easy as possible to buy the moment they are ready, we suggest making it easy for leads to connect with sales people via social media, especially if they are in the later stages of your funnel.

2. Always respond to social inquiries.

Leads sometimes have feedback or questions about a recent offer you sent them, and many will turn to social channels to get their answer. And like the demand for transparency, today's customers also expect to be able to contact your company directly through social media. If a lead's inquiry goes unanswered it will diminish their trust in your company. Furthermore, this signals to the rest of your audience that you aren't paying attention, or worse, that you don't care about your customers which can permanently damage your company's online reputation.

To avoid this calamity, you should closely monitor your Facebook account, Twitter mentions, LinkedIn comments, etc. to ensure that your leads are getting the attention they deserve. There are a number of social monitoring tools that can help monitor and respond to social media comments and inquiries. Providing prompt, helpful and personable responses can establish greater trust with your leads, and move them closer to sales-readiness.

3. Monitor for branded terms that may indicate sales readiness.

Now leads interacting directly with your social accounts aren't the only opportunities for lead nurturing. Leads are also using social media to perform their research when looking for a solution like yours. By setting up social monitoring of branded terms, you can find opportunities to reach out sales-ready leads. For example, we at Campaign Creators set up monitoring for terms like "marketing agency" and "SEO services". When someone is talking about those subjects, we can enter the conversation by offering helpful information or suggestions. Or, if you want to take the conversation a step further, introduce a salesperson directly to the prospect to discuss possible solution options—known as social selling.

4. Initiate a lead nurturing workflow when a lead connects with you on social.

While we typically think about form fills as the main trigger for initiating a lead nurturing workflow, integrated marketing automation allows you to trigger a nurturing workflow when a lead connects or interacts with your company via social media as well. This integrated approach ensures leads engaging with you on channels outside of your website are not being left behind.

5. Celebrate your customers.

A final way to use social for lead nurturing is to promote, even celebrate, current or past clients or customers. When you praise your customers, spotlight your best clients or help spread news on their behalf, it positions you as a caring supplier and provides your audience with the assurance that you see customers as more than a dollar-sign.

Chatbots And Messaging Apps For Lead Nurturing

You have probably noticed when you land on many websites these days, a chat box pops up asking if there's anything they can help you with. But why are we seeing the increased adoption of this tactic? Because their implementation has been shown to boost conversion rates, increase customer and website user satisfaction, and lower sales and customer service labor costs.

Now these chats can be manned by real people, other times by bots, or a combination of both. So let's get into your options for using chatbots and messenger apps for lead nurturing and the factors you need to consider.

Benefits of Employing Chatbots for Lead Nurturing

Don't merely look into to having an army of robots serve as a stopgap for deficient customer service. Chatbots themselves can offer you several other benefits, which include:

1. **Making sales steps shorter and easier in online transactions**: Learn to recognize which stage of the sales funnel a prospective buyer is in and determine if they are signaling for making a conversion-based decision. How? You can program chatbots to recognize keywords, phrases, and other signals.

2. **Automatically gather and archive contact data**: Sometimes even the best sales reps don't input a contact's detailed information into a CRM. If you don't have that information, it's a challenge to quickly guide a contact further in their buyer's journey even if they show buying intent. Instead, use chatbots to consistently and instantly gather, store, and archive contacts' data.

3. **Telling interactive stories**: Traditionally, you might have had a choice to make with consumers—either nurture them further by promoting your business's marketing materials or start a sales conversation. Chatbots offer a happy medium—the ability to tell interactive stories, answering user questions responsively with personality.

4. **Serving as landing pages**: Chatbots can easily direct consumers using relevant data gathered from queries to landing pages on your website. Using this strategy, you can quickly gather a website visitor's contact information and place them into a subscription list or your contact database.

5. **Helping create scalable customer service interactions**: This is the closest you should come to using chatbots in place of customer service representatives. Chatbots provide centralized, on-brand responses to frequently asked questions, which help refine and scale messaging strategies.

Factors to Consider Before Implementing a Chatbot

Before adding a chatbot to your website, you should first know that it won't replace your customer service department. Chatbots themselves actually tend to work best alongside companies that already have moderate or strong service. Why? Because on average, 83% of consumers prefer human interaction than dealing with companies. So, fluid trade-off between chatbot and service reps is best. Trade-off is also key—although chatbot technology has vastly improved, because they aren't 100% precise in identifying and responding to all consumer needs.

Further, getting the right chatbot solution can be expensive. While services such as Chatbot Academy make implementation easier, chatbots remain pricey. In short, chatbots are a tool for a company that is already doing well in its digital marketing and would like to perform even better.

Messaging Apps for Lead Nurturing

You may find that implementing an artificially intelligent chatbot for your business is too pricey of an endeavor or you may be unsure if it is worth the investment just yet. That said, you can still leverage messenger applications for lead nurturing purposes. How? By strategizing for customer service or sales representatives to monitor that line of communication. This strategy can easily supersede the traditional strategy of discussing over the phone a contact's inquiries. In fact, 56% of people prefer messaging rather than calling a business and 61% are favorable to personal messages.

Employing this strategy offers both a business's staff and consumers further benefits, including the ability to reach more of your audience, making it more convenient for audiences to reach out, and to create a more efficient work environment for you.

Plus, there are plenty of messaging apps which you can take advantage of. Just to name a few, there's WeChat, Facebook Messenger, and you can host a chat platform on your own website (even without a chatbot).

Similar to targeting the right audiences over social media, make sure you are targeting the right audiences over chat applications. For example, engaging audiences over WeChat is done better by utilizing gamification, which requires HTML5 expertise to integrate. Engaging audiences over Facebook Messenger is much easier, with multiple segmentation filters you set up previous to implementing the chat app. This helps you easily identify which audiences you should bother with.

And, engaging audiences over chat on your website, unless they've already supplied you their contact information, you'll need to ask questions that engage with them based on their interactions. Say, they read a blog, were taken to a landing page, but didn't fill out their information, and sat idle. Prompt them with a gentle notification that they forgot to complete that action.

Direct Mail For Lead Nurturing

So, more than likely you've heard of using direct mail to generate leads. It's long been popular before digital marketing took off. It isn't that difficult after all. All it takes is spending tens of thousands of dollars (if not more) to blanket geographic areas with an on-page advertisement.

Pejoratively, these kinds of ads are known as junk mail and might seem somewhat inefficient given how they are indiscriminately delivered. That said, direct mail advertising continues to exist even in an increasingly digital world. Why? Because it gets results. In 2017 alone, direct mail advertisers based in the United States generated more than $10 billion in revenue.

The capabilities of using direct mail for lead nurturing are also growing increasingly sophisticated, using more precise means than ever to reach audiences.

Benefits of Using Direct Mail for Lead Nurturing

Think of a grocery store. In the past, direct mail advertising for a grocery store might have consisted merely of a few pages of coupons for popular items in hopes that the store casts as broad a net as possible to drive sales.

Now, you can take an almost inverse approach. By capturing and aggregating data and using software to analyze it, you gain an acute idea of what products or product clusters might appeal to certain people, primarily based on past purchases. With the help of on-demand printing, you can send more personalized direct mail to audiences advertising the products they are most likely to buy.

Best Practices for Using Direct Mail for Lead Nurturing

What about using direct mail to reach contacts who haven't made a purchase? The key, as with many things related to digital marketing, is encouraging the marketing channel to be personalized to your prospective audience's needs. Doing so, you must recognize where audiences are in their buyer's journey and then send them appropriate messages.

In practice, this has many variables. Consider a common thread, though, that direct mailing should leverage some kind of lead interest via data gathered. If you want to be good at direct mailing, responsively engage only after a contact signals their intent. For example, say a person visits your company's website and fills out a contact form, you can follow up not only via digital channels but also to send them marketing collateral in the mail. In a world of crowded email inboxes, snail mail (ironically) offers your company a way to stand out.

Mobile Marketing and SMS for Lead Nurturing

So much of life is now conducted via smartphones and other mobile devices. Accordingly, it's no surprise that savvy marketers are increasingly using mobile and short messaging service (SMS) technology in their lead nurturing efforts.

How to Use Mobile Marketing and SMS for Lead Nurturing

Get started using mobile or SMS marketing after a contact provides you their cell number. It's critical this be a voluntary action, so not to violate spam laws. That said, it isn't difficult to encourage contacts to opt-in to this marketing channel. If you have a point-of-sale system, you can automatically ask consumers to enter their phone number into the system. Or, simply ask them if it's okay to contact them with future offers via SMS. A surprisingly high number of people will okay this kind of contact.

Once you have a person's SMS contact information, make sure when you contact them, you're offering an asset of value. After all, every interaction with your audience (whether it occurs in-person, over the phone, or via text) is about building the relationship. In addition, you will want to ensure messages are short for the sake of SMS limits (~140 characters) and consumer attention spans.

Best Practices for Using Mobile and SMS for Lead Nurturing

No one likes a spammer. Thus, never attempt to send an avalanche of text messages to contacts or else you'll quickly learn the hard way and perhaps even find the contact blocked your number. In addition, avoid sending images or excessively large files via text. While telecommunication companies have gotten a little more generous with data limits, data remains a somewhat precious monthly commodity for the average customer.

Regarding that, large files should only be sent via text to contacts who specifically request them. Even then, you might want to offer an alternative means to send this information. Taking this step can open up additional channels for audience engagement.

Premium Educational Content For Lead Nurturing

At every stage of the buyer's journey, leads learn more about their pain points and possible solutions. Premium educational content is a valuable tool for you to nurture leads at every stage of their buyer's journey and your sales process, done so by educating them and positioning your company as a solution provider. To start, make sure your buyer personas are on-point, as that will be critical to the success of this strategy, so you target exactly the right audiences with the right materials.

Here's a breakdown of how to provide leads with premium educational content at each stage of their buyer's journey.

Top of the Funnel | Awareness Stage Content for Lead Nurturing

Content at this stage should attract and generally educate customers about their need. Why? Website visitors have yet to convert into leads and are just now becoming (or still have yet to become) aware of their problem. Therefore, the best types of assets to provide at this stage include guides, checklists, quizzes, worksheets, and assessments.

To contrast against negative strategies for this stage—you shouldn't send a 50-part case study detailing why your company is a great fit. Remember, targeting audiences with the right premium educational content, even at the top of your funnel, can pave the way for more in-depth conversation further along their journey.

Middle of the Funnel | Consideration Stage Content for Lead Nurturing

By the middle of the sales funnel, a lead is well aware of their pain point and is investigating how to resolve it. In this stage of your sales funnel, reach out to leads with assets like case studies, whitepapers, eBooks, webinars, and videos. With these, you can detail why your business is a great fit for them.

Be extra strategic by jointly utilizing lead qualification strategies to identify prospective customers or lack thereof. Those who don't engage with premium educational content at this stage likely are not the greatest candidate to do business with.

Bottom of the Funnel | Decision Stage Content for Lead Nurturing

You'll deliver most premium educational content during a lead's consideration stage of their buyer's journey. There is, however, no limit on how much content you should send them. Especially in B2B, sales cycles are often long and complex. You might easily send 5-6 assets in that instance.

Though the MoFu stage is considerably important, delivering this same kind of content to leads in the BoFu stage is also beneficial. How? Premium educational content at this stage can provide qualified leads a last needed-nudge towards sales conversion. For example, you could propose they take you up on a free marketing strategy session or a demo of your software.

Although this strategy is applicable to every stage of your sales funnel, especially in the BoFu stage, you should want your premium educational content to be crafted of the highest quality degree. Doing so will ensure better response in interactions and engagement rates from leads.

Lead Nurturing Emails

The go-to way for using email for lead nurturing is by prompting (or nudging) a prospect or lead along in their buyer's journey, though it must be done properly. To ensure email lead nurturing succeeds, you must send leads nurturing emails responsively and not too frequently. No one likes email spam, right?

Next, let's go over how to deliver lead nurturing emails at every stage of your sales funnel.

Top of the Funnel | Awareness Stage Emails

Send this email when a visitor becomes a contact or lead after filling out a form on your website so they'll receive an asset, such as an eBook or guide. The email acts as sort of a "Welcome", quite literally welcoming your new contact and congratulating them on their new asset.

For example, the email could say: "Here is the free eBook you requested from [Insert your company's name]. Enjoy!"

Middle of the Funnel | Consideration Stage Emails

In this stage, perhaps the contact isn't quite ready to buy but they're interested in what you have to offer. They're also understanding of their pain points and are actively gathering more information about the solution you (or other companies) offer, in order to decide what's best for them. Thus, you want to nurture them this time with an email that positions yourself above the competition. Send them a nurturing email that contains a whitepaper or case study. Of course, keep the asset relevant to the contact's needs.

Before moving onto the BoFu stage, let's identify another audience you should want to reach in your MoFu stage—retargetable audiences. These are audiences who've given signals of wanting to buy but no longer interact with your website. Possibly, they've abandoned an online shopping cart or didn't engage with a previously downloaded asset. In either of these cases, you should send them a nurturing email reminding them of their failed purchase or about the importance of the asset.

Bottom of the Funnel | Decision Stage Emails

This is the stage where a customer is most ready to do business and when you should email them with a hard offer. Simple as that. Or, nudge them along with a slightly less immediate offer, like providing them a demo of your software.

For example, send them an email saying: "You've read our eBook. Now, get 30 percent off our solution."

If you want to use lead nurturing emails to the best extent, remember—Gently yet urgently nudge a customer through their buyer's journey.

Feel like you have new lead nurturing tactics to incorporate into your current lead nurturing strategy? Take your learning to the next level by applying your knowledge in the *Lesson 4 Exercise* below.

Lesson 4 Exercise

Choose a New Lead Nurturing Tactic

1. Review the different tactics in this lesson and select one that you are not already using for lead nurturing.

2. Answer the following questions:
    - Describe how you could employ this tactic for your company.
    - What do you need before you can execute this tactic (e.g., I need an SMS provider, I need to segment my list, I need to set up social monitoring)?
    - List the specific steps needed to execute this idea to completion.
    - Set a deadline for completing Step 1.

In *Lesson 5*, we will cover lead nurturing with email in much more comprehensive detail, such as highlighting best practices and email testing. We'll even provide you solid templates and examples which you can use for your own email lead nurturing campaigns.

CAMPAIGN CREATORS

LESSON 5: LEAD NURTURING EMAILS

Welcome back to the Lead Nurturing Masterclass. In this lesson, we will be learning the ins and outs of lead nurturing emails, complete with examples of successful nurturing emails.

In this lesson:

1. Lead Nurturing Email Best Practices
2. Email Testing
3. Lead Nurturing Email Templates
4. Lead Nurturing Email Examples

Lead Nurturing Email Best Practices

We begin by going over the best practices that apply to the main components of your nurturing emails.

Subscriber List and Database Management

Email lists naturally decline in value over time. If you are not currently adding names to your email database at the same rate as you were in the past, it could be a significant factor contributing to declining rates of email engagement. The best solution to resolve list aging is to better optimize your website, future emails, landing pages, and other marketing campaigns to intake new names into your email database.

List cleaning and appending, which can be managed by automation software, will also help in keeping your lists up to date and organized. In regards to cleaning, most email platforms have algorithms in place to ensure email lists are being properly cleaned and will improve over time, so external paid services are not usually necessary.

Email Subject Lines

The significance of subject lines in email open and click-through rates should not be underestimated. A subject line is your chance to make a first impression, to have your email noticed among the dozens competing for a recipient’s attention in their inbox on a daily basis.

Here are some of the primary factors to keep in mind when devising an effective subject line:

1. Brevity

Resist the temptation to dump as much information as possible into the subject line at the risk of overwhelming the reader. The recommended character limit, short though it may seem, is 65 characters. Opt for short, concise sentences.

2. Word Choice

In many cases, it is recommended to create a feeling of urgency by placing actionable words such as “discover”, “act now”, and “limited time” into a subject line. Words that express novelty also produce high engagement. However, it is important to do some research on which words perform better, as certain seemingly sensible choices, like “save”, “earn”, or “buy” can often attract spam filters.

Additionally, avoid writing “clickbait” phrases that do not accurately reflect the email’s content—they are more likely to cost you readers’ trust upon opening. Focus instead on a consistent tone that reflects your brand/the nature of your product. If the image you are looking to convey is one of fun and excitement, for instance, let your subject line reflect that!

3. Personalization

Incorporating personalization tokens like name or location into a subject line has been proven to increase open rates, as it helps create a feeling of a more personal connection between the recipient and the company. If your email software doesn’t allow for tokens to be inserted automatically into emails, you can still add the word “your” into the subject line to create the sense that the contact is being reached out to directly and personally.

Some emails are intended to educate readers and keep them up to date on a topic of interest your company specializes in. In these cases, incorporating trending topics into the subject line can help establish your company as an authority within your industry.

In contrast, emails which are intended to focus on product offers or promotions should emphasize the limited range of time in which the recipient can take advantage of them (for example, specific numbers and dates), or the relevance of the offer to the recipient’s current situation. Ideally, subject lines can and should take into account buyer personas, which provide guidance for both word choice and email content.

Visualize It: Email and Visual Appeal

A picture, as it is often said, is worth a thousand words, and in the visual-driven sphere of digital marketing, it may be worth far more. The right visuals in the right emails can increase email engagement significantly, but there is a fine balance between using too much and too little visual content.

Here is a comparison in greater detail of two main kinds of visuals and the pros and cons of each in email.

Static Images

Examples: Product images, brands logos, CTAs, or customer-created photos.

- Static images are most likely to be seen by your contacts
- Fairly easy and time-efficient to produce
- Potential image blocking or inability to display images in some of your subscribers' inboxes
- Not optimal for promoting something more complex than a physical product, such as a service or site

Best use: Displaying a single, straightforward product or idea. Optimal for marketers with less experience or budget for adding visual content to your emails.

Moving Visuals (GIFs and Videos)

Examples: Demonstration videos, product use animations, or short testimonials.

- Videos have been shown to drastically drive engagement and conversion rates
- Many email clients are able to display GIFs
- Higher learning curve and more time-consuming production
- Software for videos particularly may require a monetary investment or even outsourcing
- Large file sizes make emails more difficult to load, and some clients don't support them altogether

Best use: Dynamic display of the function of your product or service. Videos enable greater complexity than GIFs, taking the email from eye-catching display to educational/instructional value or a detailed explanation of the product's benefits.

Other Email Visual Design Tips

1. **Offer a plain text version of emails** - A plain text version removes the design-friendly HTML formatting in favor of a simpler text-based email, a user-friendly option for subscribers to read the content.
2. **Add alt text to images** - As many email clients do not allow images by default, an email with an image may not always appear unless the user changes their settings. Adding alt text ensures the receiver always knows what the image/message is.
3. **Link out your videos** - Use a screenshot of your video with an outgoing link that takes recipients to the actual video in order to cut loading time and ensure the email's compatibility with all clients.
4. **Test for mobile-friendliness** - With phones and other devices becoming an ever more popular platform for viewing emails, it's crucial to ensure that the components and layout of your emails are compatible with them.
5. **Invest in your CTA design** - The size, positioning, font, and color of your CTA should not be underestimated as significant factors affecting click-through rate, a major measure of success of any email. Experiment with these components through A/B testing (as we will discuss later).

Segmentation

Timeliness can be greatly improved by making use of list segmentation—that is, dividing your subscriber base into several groups based on information on your customers' demographics and the actions they have already taken. For drip and lead nurturing emails, the entire series of emails sent to a contact can be custom-tailored through segmentation and workflows.

When it comes to constructing segments, you can get as specific as needed to address the particularities of your industry, buyers, and products. For eCommerce, for example, recommended approaches to segmentation are:

- **Engagement level** - Engaged subscribers show clear interest in your product offers and yield high email open rates; they should accordingly be reached out to more frequently. Less engaged subscribers, whose interest is waning, should be treated carefully and contacted on a "quality over quantity" policy. They may require a re-engagement campaign.
- **Purchasing patterns** - The purchase history, frequency, and recency of customers is another powerful dataset to use in creating relevant and timely offers. However, keep in mind that the individual's info matters as much as the group's when it comes to retaining contacts. Frequent buyers and big spenders rightfully deserve to be treated like they are valuable.
- **Demographics** - Finally, demographic data like age, gender, and geography cannot be discounted. As visuals and product pricing may be major features of your email body, it is important to draw recipients in with the products that matter to them.

Automation Software

Email automation software is a crucial tool for marketers seeking to level up their email campaigns, and almost certainly will be necessary for implementing your email strategy. This software can serve a wide range of purposes, but features to look for when choosing from a list of candidates include:

- A dashboard with analytics
- Contact database organization and segmentation
- Email flows with action-triggered or manual scheduling and/or segmented sending to portions of your contact base
- Templates designed to fit various kinds of emails for different campaigns and stages within a campaign
- A/B testing capabilities and reporting on the performance of an email campaign (with metrics such as delivery, open, bounce, and click-through rates)
- Customization options that utilize information from contact records

Email Testing

Of course, to not all nurturing emails and campaigns are built alike, and to determine what works best for your company, you will need to conduct testing. To help you get started, here are three major goals to focus on in your testing efforts.

Testing to Improve Deliverability

Signs that you are experiencing issues with email deliverability—that is, the arrival of emails in your intended recipients' inboxes—include:

- **A high number of bounced emails**, as reported by your email or marketing automation platform under email performance metrics. You may be able to see how many hard and soft bounces the email experienced. A "hard" bounce indicates a permanent reason an email cannot be delivered, such as a change of the subscriber's email address. A "soft bounce", on the other hand, typically indicates a temporary delivery issue to an address, for reasons such as a full mailbox, an overly large email size, or a dysfunctional email server.
- **A high number of emails being marked as spam**, or your company being flagged as a spammer. Outside tools may be necessary, since you may not be able to determine this within your email or marketing automation platform.

With the indicators identified, two questions stand—how to prevent deliverability issues and how to fix an existing one.

1. How to Prevent Deliverability Issues

Ways to prevent a high rate of bounced emails include updating your list frequently and remove hard bounced email contacts, sending emails from your own domain to ensure you pass DMARC policies, and ensuring a new contact's email address was typed correctly upon entering your database.

With regards to preventing emails from being marked as spam, it may be wise to reduce the number of emails you are sending. Every email sent should serve a specific purpose rather than be sent simply for the sake of reminding contacts of your existence, a tactic which can easily backfire and cause annoyance. Litmus is a great tool to use to test whether your email will be marked as spam ahead of your send.

Preventing being flagged as a spammer centers on legitimizing your emails by sending from your own domain, avoiding spammy or clickbait-style sounding subject lines (i.e. all-caps, irregular punctuation, large fonts, and exclamation points with spam trigger words like "free" or "save money"), and including straightforward and clearly visible unsubscribe options in all emails.

2. How to Fix Deliverability Issues

So what about fixing current problems with deliverability? A good place to begin is by acquiring the right software, like the previously mentioned Litmus tool, which can test for email bounces and spam status.

It’s also advised to clean your contacts list regularly, removing any contacts who have hard bounced once or soft bounced more than 3 times after every send. If the contact cannot receive your emails, then there is really no reason to keep them on your mailing list!

Finally, find any spam lists you are currently on and remove yourself from them with the use of a tool such as MXToolbox, which will provide you with instructions for how to get removed. Often, this process is as simple as sending an email to the right person that explains the situation; for instance, that the behavior of other users on your shared sending domain caused it to be placed on the list.

Testing to Improve Open Rates

Determining the degree to which your email open rates need improvement requires information on the average rates for your industry, as well as your company’s historical open rates (OR). While recent figures show that overall ORs range from 7.1% on the low end to 30.9% on the high end, these can vary widely. Even if your company is performing to or outperforming standards, however, there is always room for improvement in your strategy!

The most useful and critical method to increase open rates is by constantly “Testing, Testing, Testing”. Here are some examples of useful tests to run to raise open rates:

1. Sender Tests

Try sending emails from a brand name, a specific representative at your company, and an email address with company info in its name (e.g., info@campaigncreators.com). You can also test within your sender options; for instance, sending from different representatives’ accounts, or sending from different email addresses (info@ vs. offers@ vs. tammy@). Emails sent from a person tend to see higher open rates more often than those from a company and help build a more personal relationship between your brand and your recipient.

2. Subject Line

Recent research shows 47 percent of email recipients quickly decide whether to open or ignore emails based on the subject line alone. When it comes to subject lines, you can test length, content, offer type and placement, word choice, and more. See the “best practices” section above for more details.

3. Preview Text

Preview text is the short summary text that immediately follows the subject line when viewing an email in an inbox. This text is often ignored because it is not displayed in your email's layout. However, the ability to edit this text for length and content in many email automation platforms offers another opportunity to optimize the open rate of your emails.

Testing across our B2B and B2C clients has revealed that content supportive of your subject line, but not exactly the same as the subject line, performs best. When it comes to length, your preview text should be at least 90 characters.

4. Personalization

Whether a first name or even a company name, personalization increases the chances of catching the attention of your audience. When it comes to placement the subject line, preview text, or greeting are ideal locations.

5. Time and Day

Do not blindly go along with with recommendations offered by email marketing sites—the optimal time and day of the week to send your email vary from one database to the next. In order to find the combinations that are best for your subscribers, a significant amount of time should be spent testing.

6. Segmentation

As discussed, segmentation is key to sending relevant content to subscribers, but there are numerous ways in which you can slice and dice your database to create unique segments. To begin, it may be helpful to compare the performance of open rates for customers vs. leads and active vs. dormant leads.

7. Suppressions

Just as unengaged contacts may affect email deliverability, they can significantly impact open rates. It is advisable to suppress the segment of unengaged subscribers from the majority of your email sends, unless the email is specifically aimed at re-engaging these dormant leads. This will prevent such contacts from inaccurately weighing down your rates in testing.

Testing to Improve Click-Through Rates (CTR)

If you have compared your CTR to industry averages and your own historical data and found they are subpar, it's time to get them out of the gutter. Let’s examine some of the most helpful tests to run to improve click-through rates.

1. Design

To understand what kind of design will get the most clicks from your audience, you can try tweaking elements including header banner (e.g., with vs. without header banner; animated vs. static), columns (e.g., single vs. multi column), and high design vs. stripped-down (e.g., text-based vs. image heavy).

Overly designed emails generally perform worse, particularly in B2B marketing. Sticking to a format familiar to subscribers is best. For a stripped down email, a standard example format from top to bottom is:

- Logo
- Greeting
- Email copy (including one in-text call to action)
- CTA button (reiterating the in-text call to action)
- Signature
- Social share buttons
- Unsubscribe link

By sticking to a formula recipients are familiar with you eliminate confusion and keep the focus where you want it—on your call to action.

2. Text-to-Image Ratio

As a rule, images should support the text of your email, not the other way around. All essential email content and CTAs should be text-based. While emails with a higher ratio of text to images perform better in terms of click-through rates, this aspect must be tested on your own audience to determine what they prefer.

3. Length

If your goal is for people to click-though, then it is best to keep emails on the short side, and longer emails should include menu items at top that summarize the longer content that follows to guide readers short on attention or time.

4. CTAs

CTAs offer a variety of testable elements, such as the type (text link, button, or image), color, and placement. It is always an option to include two different types of CTAs in each email, but no more than three CTAs total should be included in each email, except in the case of longer, newsletter-style emails.

5. Social Sharing

Including social sharing links is a great way to get your content out to a wider audience. However, if they distract users from following through on your primary call to action, then it is best to remove them—testing is the only way to determine this.

While these are not usually the highest clicked buttons, they do have potential to receive considerable engagement, and serve an extra function by providing those people who are not currently interested in the described offer the option to share it with someone who might be. In this respect, these buttons can function as free lead generators.

Lead Nurturing Email Templates

Creating or selecting emails for lead nurturing begins with determining the range of types of emails you will be using in your campaigns. Throughout the buyer's journey of a subscriber, a variety of emails will be needed to deliver the right content and sustain a strong relationship between them and your company.

1. Welcome Email

Welcome emails thank a new contact for subscribing and introduce them to your brand, possibly prompting the subscriber to complete their profile or begin exploring site content. It is important not to jump too far down the funnel with regards to the nature of the content or offers you will be sending.

2. Educational Content Email

Educational content can entail providing information about your industry, technology related to your service/product, practices for managing their own business (in the case of B2B), etc. This content, as in the case of many other emails, can be tailored for several lead segments.

Generic educational emails can be followed up with more targeted, "best practices" emails upon engagement, offering content in the form of a guide, whitepaper, or webinar registration link that provides greater value. Education can also be offered via periodic newsletters, which keep the subscribers up to date about your brand and products/services.

3. Social Engagement Email

One of many ways to maintain a closer relationship with customers is through engagement on social media and emails that invite readers to subscribe to your company blog, follow your Twitter or Instagram, connect on LinkedIn, etc. are an excellent means of accomplishing this. Placing your content and offers in multiple news feeds with which customers interact on nearly a daily basis will ensure they will keep you top-of-mind.

4. Sale/Promotional Email

Some emails focus more directly on converting an email subscriber into a customer with an offer. This can be anything from a demo to a free trial offer to a coupon, sale, or discount, depending on the nature of your products. For some prospects, offering exclusivity or entry into a raffle/giveaway can be used to increase appeal. Determining which types of offers work best for certain segments requires testing and analysis.

5. Order Confirmation/Receipt Email

This email should be triggered when a subscriber makes a purchase. It serves three uses in one as a transactional confirmation, a thank-you note for purchasing your product/service, and an opportunity to further upsell or cross-sell. The trick is in balancing the transactional content—which should comprise the vast majority of the email body—with the right proportion of relevant promotional content.

6. Personal Email (For B2B)

At the point in which a contact is approaching the bottom of the funnel, sending a more personal email from a sales team member can prove to be the step necessary to drive the closing of the sale. A personal touch provides an opportunity to answer questions, address concerns, and reinforce the feeling of a human connection in a digital era.

7. Re-Engagement Email

Inevitably, some subscribers become inactive over time while remaining subscribed to your list. This doesn't mean they are necessarily a lost cause, rather, they need to be nurtured back onto the path of their buyer's journey. As such, re-engagement emails should aim to gently nudge recipients in that direction, whether with a sentimental appeal or an attractive offer.

Contacts can be reminded of the value that they are missing out on, but it is crucial not to be too pushy. After a certain point of unresponsiveness, your email can ask the contact to confirm that they are still interested in being subscribed, giving them an honest chance to opt out and removing the pressure to re-engage with a bottom of the funnel offer.

8. Cart Abandonment Email

Sharing similarities with the re-engagement email, the abandoned cart email may seem too straightforward. It aims to remind a contact that they have abandoned items in their online cart for which they failed to complete the checkout process, and sometimes is combined with a re-engagement-style discount offer. Yet a staggering estimated average of 69% of eCommerce carts are abandoned by users! This can amount to millions of dollars in revenue lost annually, but abandoned cart emails can mitigate the damage by up to 30%.

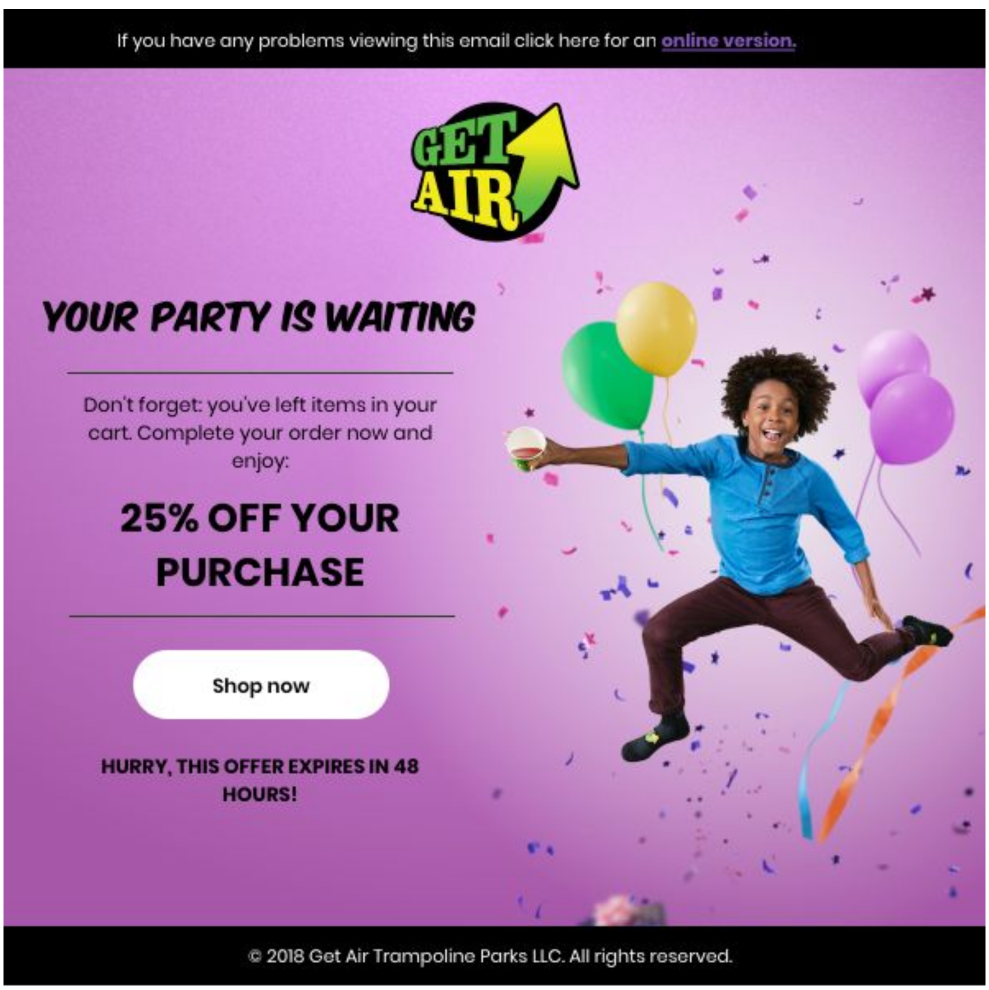
Lead Nurturing Email Examples

Examples of an Abandoned Cart Lead Nurturing Email

Abandon Cart Email for Family Fun Center

Get Air trampoline parks wanted to increase party sales for their 70+ locations spread throughout the world. After updating the user interface of their party booking engine, they recognized that some users would abandon their journey just before finalizing their booking.

To recapture these lost sales they created an abandoned cart email. The sending of the email was controlled with an automated workflow, triggered whenever a user made it to the final stages of booking a party but failed to submit payment details to complete the purchase. By reminding users that they had forgotten to complete their booking and offering a moderate discount, Get Air was able to recapture an average of $5.17 per recipient.



Abandoned Application Email for Higher Education

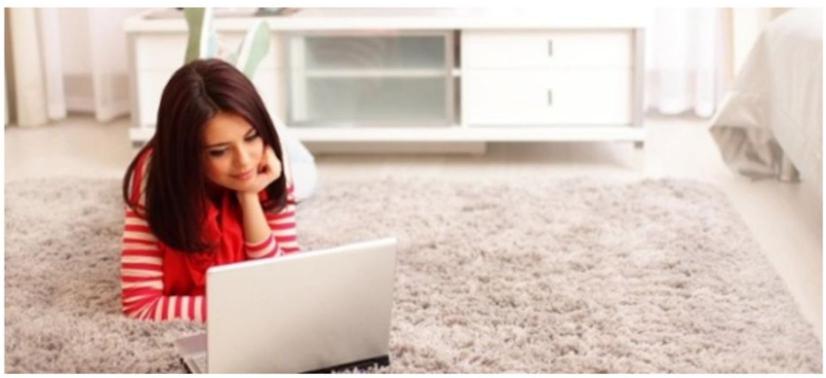
The University of Wisconsin–Madison School of Pharmacy is a global leader in pharmacy education, research, and service in pharmaceutical, social, and clinical sciences. Despite their ranking and success as a top PharmD program, the University of Wisconsin–Madison School of Pharmacy was faced with a common issue amongst Universities today, the number of students applying had dropped. Furthermore, many prospective students would begin their application for pharmacy school but never complete it.

To re-engage these prospective students and improve their application completion rates, they created an “abandoned application email”, reminiscent of abandon cart emails seen in eCommerce. The email was sent via an automated workflow that was triggered when students who began their application, but did not finish it within a set time period. By simply reminding prospective students that their application required further attention, 37% went on to complete their application, significantly improving application completion and enrollment numbers.

See example on next page.

Hi Future Pharmacist,

With your PharmCAS application, you've taken an essential step on the path to a career in pharmacy. But there's another step — an important one — that applicants have been known to miss.



Be sure to finish the supplemental application

Many pharmacy schools require a **supplemental application, in addition to the PharmCAS.** Here at the University of Wisconsin–Madison our supplemental application:

- is available for the Fall term, 2019.
- uses a PharmCAS ID to get started: https://sa.pharmacy.wisc.edu/pharmdapply/
- is due no later than February 1, 2019, and can be submitted at the same time as your PharmCAS application.

Don't miss out — your pharmacy school application is not complete until you submit the supplemental.

Examples of a Re-engagement Lead Nurturing Email

Re-engagement Email for Marketing Agency

Campaign Creators is a Marketing Agency that, like most B2B services firms, faced a long sales cycle. Although they had a sophisticated lead nurturing campaign funnel in place, some leads would fail to progress to the next stage and their was no clear pathway for re-engagement.

Many of these leads had not engaged with the company for several months, so it seemed inappropriate to just throw an offer or sales pitch their way. To rewarm these leads, they sent an email that contained several educational content pieces curated to match their needs and industry, and absolutely no promotional offers or sales content. The goal was simply to provide the lead with valuable content and reintroduce them to the company. This email successfully rewarmed 35% of the cold leads who received it.

See example on next page.

Hi friend,

Whether you're operating in the B2B or B2C space, these resources contain tactics, strategies and tools you can implement into your lead nurturing strategy to see tangible results.

7 Signs You Need Help With Lead Nurturing

- A clear definition of what lead nurturing is and why a strong lead nurturing strategy is important.
- 7 telltale signs of a lackluster lead nurturing strategy such as a lack of segmentation or losing leads to miss-timed follow-ups.
- A variety of resources that will help you develop, implement and optimize your lead nurturing strategy.

Blueprint for an Automated Lead Nurturing Campaign

- Why you need a lead nurturing campaign and what results you can expect to see from implementing one.
- Key elements of a successful lead nurturing campaign.
- The differences between B2B and B2C/eCommerce lead nurturing campaigns.

How to Create Lead Nurturing Content for Every Stage of the Buyer Journey

- Content you need for the awareness stage of the buyer's journey such as guides, worksheets, and assessments.
- What you need to know about the consideration stage and why this is where your content should offer a solution.
- Questions you need to ask yourself to define the decision stage and what your bottom-of-the-funnel offer should be to make sure leads choose you.

I hope these resources give you some new ideas for how to optimize or overhaul your current marketing strategy. As always, if you'd like more information or want to talk marketing, my contact information is in the signature below.

Cheers,

TAMMY DUGGAN-HERD, PHD // Director of Marketing

ECommerce Replenishment Email

VitaCup, an eCommerce business that sells vitamin-infused coffee and tea pods, had a large existing database of contacts built from their paid media channels. Unfortunately, few of those contacts actually converted into a purchase, or they struggled to have existing customers purchase with them again.

To remedy this, they created a replenishment email to re-engage past customers right before they were about to run out of their VitaCup products, reminding them to purchase again. The email was triggered to be sent via automation 3 months after the initial purchase. Over 12 months, the replenishment campaign, along with an abandon cart emails, produced a 300% increase in email revenue.

Example of an Order Confirmation Lead Nurturing Email

Campaign Creators, along with providing agency services, sells website page templates through the HubSpot template marketplace. Rather than charging a larger upfront cost for the templates, the company decided to use template purchases as a lead generator for their website services.

To do this, after customers downloaded one of the free templates, Campaign Creators would offer customization of the template at a cost. By providing customers with a more hand-ons and personal service, Campaign Creators hoped to solidify their position as a trusted vendor to provide website design work for them in the future. To communicate this offer, customers received a confirmation email from the company CEO thanking them for downloading the template and presenting the customization package.

See example on next page.

CAMPAIGN
CREATORS

CAMPAIGN
CREATORS

Thank you for downloading a Campaign Creators Ultimate Conversion Template!

Hi friend!

I'm Bob, CEO at Campaign Creators, a HubSpot Platinum Agency.

I'd like to personally thank you for downloading one of our Ultimate Conversion templates.

If you need any help with set up, we offer services to implement and customize our templates for only $150. Your Template Customization Package includes:

- Background color
- Body font (family, color, size, height)
- Headings (family, color, size, height)
- Container width
- Form Styling
- CTA Button styling
- Eliminating unneeded modules/section

We at Campaign Creators have spent the past 7 years perfecting these templates to achieve maximum conversion rates and nothing makes us happier than sharing them with you.

Click the button below to purchase your Template Customization Package!

BUY CUSTOMIZATION PACKAGE

Disclaimer: The package includes one round of revisions regarding the customization items listed above only. The package does not include ongoing technical support for the template. Please contact HubSpot support for these needs.

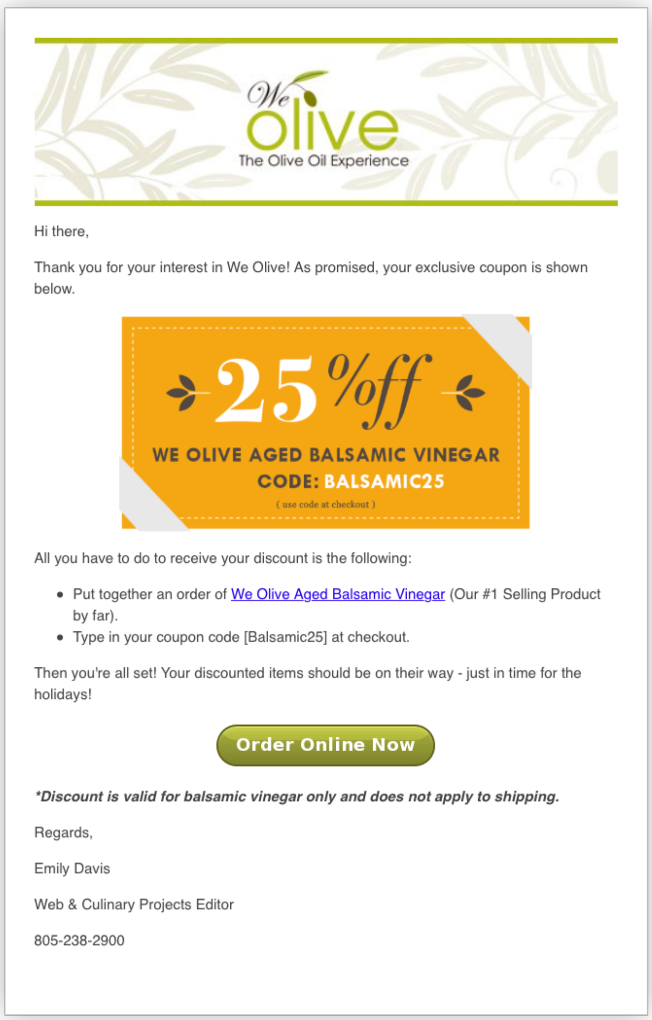
Thank you again,

Bob

Example of a Promotional Email

We Olive, a fine foods retailer, had a large list of email subscribers gathered over the years from their brick and mortar locations. The problem was that many of these customers were visitors from out of town, making in store promotions and events irrelevant to them. In order to monetize this audience they needed to encourage them to make purchases in their new eCommerce store.

They implemented a series of promotional emails that were sent to these subscribers that provided discounts and introduced online only products. The result of just one email promotion series for the Black Friday holiday was a 30% increase in revenue compared to the previous year.



Feel like you have a better understanding of lead nurturing emails? Take your learning to the next level by applying your knowledge in the *Lesson 5 Exercise* below.

Lesson 5 Exercise

Lead Nurturing Emails for Your Target Audience

Refer to the *Lead Nurturing Email Templates* section and the *Lead Nurturing Email Examples* section to come up with lead nurturing emails that you could send to your target audience. Then decide what content will be included and a subject line for each email. Make sure to follow the best practices for writing email subject lines under the Lead Nurturing Email Best Practices section.

1. **Welcome email**
   a. Content:
   b. Subject line:

2. **Educational email**
   a. Content:
   b. Subject line:

3. **Social engagement email**
   a. Content:
   b. Subject line:

4. **Sale/Promotional email:**
   a. Content:
   b. Subject line:

5. **Order confirmation/receipt email**
   a. Content:
   b. Subject line:

6. **Re-engagement email**
   a. Content:
   b. Subject line:

7. **Cart Abandonment Email (eCommerce)**
   a. Content:
   b. Subject line:

8. **Personal email (B2B)**
    a. Content:
    b. Subject line:

We hope those examples left you inspired to craft a few lead nurturing emails of your own. Now, email is a key element of lead nurturing, but it is only one piece of a comprehensive lead nurturing campaign. We will use *Lesson 6* to cover lead nurturing campaigns in detail.

LESSON 6: LEAD NURTURING CAMPAIGNS

Welcome back to the Lead Nurturing Masterclass! In this lesson, we'll dive into how to craft a lead nurturing campaign that guides leads through their buyer's journey towards a purchase from your company. This includes creating offers catered to your target audience at every stage of their journey, maximizing the conversion rates of your landing pages, and connecting it all with email sequences that progressively nurture leads towards buying from you.

In this lesson:

1. What is a Lead Nurturing Campaign?
2. Benefits of a Lead Nurturing Campaign
3. Core pieces of a Lead Nurturing Campaign
4. How to Create a Lead Nurturing Campaign in 6 Steps
5. Difference Between B2B and B2C Nurturing Campaigns

What is a Lead Nurturing Campaign?

A lead nurturing campaign focuses on actively moving leads through the stages of their buyer's journey and into your paying customers. By providing prospects the information they need in their decision-making process, you build a relationship with your lead and establish your brand as a trusted source of information. That way, when the time is right, your buyer will be much more likely buy from you.

Benefits of a Lead Nurturing Campaign

First and foremost, a lead nurturing campaign will increase the rate of leads who make it all the way through your sales funnel and become customers. Other positive results of lead nurturing campaigns include shorter sales cycles and lower cost per customer acquisition, which means increased ROI.

Additionally, the process of building out a nurturing campaign helps you better identify and understand your customer needs and goals, build a stronger reputation in your industry, and set the stage for stronger and longer relationships with those leads who become customers.

Finally, lead nurturing campaigns increase the lifetime value of your customers and decrease customer churn by nurturing your current customers to make repeat purchases.

Core Elements of a Lead Nurturing Campaign

Although there are a variety of ways to structure a lead nurturing campaign—based off of the company, its customers, and its respective industry—the most successful campaigns share a few core elements that play a large role in pushing leads down the sales funnel. Let's go over these components, and the role they play in the effectiveness of your lead nurturing strategy.

The core pieces for building a lead nurturing campaign include:

- Hook (Lead Magnet or Offer)
- Landing Pages
- Personalization and Segmentation
- Emails
- Workflows
- Nurture Content
- Reporting and Analytics
- Optimization
- Operator
- Automation Tools

Hook (a.k.a. Lead Magnet or Offer)

This is what initially attracts a person to your brand and gets them into your database. A hook can be a coupon, a free assessment, a month of free service, or a content piece such as an eBook or guide. Most importantly, a hook must deliver something your persona perceives as valuable.

Landing Pages

Landing pages, also known as "lead capture pages", are a primary way of delivering your offers or hook to leads, and are the way in which you collect a visitor's contact information, turning them into a lead (or marketable name) in your database. They redirect the user away from website pages or email links to a lead form, which promises content or an offer of value in exchange for the lead's personal information. A strong call to action is arguably the most important part of any landing page, followed by a quality offer, and well-designed page template.

To make sure you have a strong and successful landing page, make sure you have the following:

- A clear and distinct call to action repeated throughout the page (e.g., in the copy, on the CTA button, and in the form title)
- A compelling headline that communicates the Unique Value Proposition of your offer
- A brief description explaining the value of the offer
- An authentic image of the offer
- Your UVP, form, and CTA button above the fold on all devices
- A "thank you" page (used to deliver the offer after a form fill)

Segmentation

This approach to dividing your database of contacts involves assigning them to groups with similar characteristics, needs, and interests in order to deliver a more personalized experience. You can segment your lists of contacts and leads using data collected explicitly through forms, as well as from interactions they have with your company after entering your database. 23% of email campaign engagement is dependent on the level of segmentation used.

Characteristics of these segmented lists can be based on demographics or behavior. More specific criteria can include the lead's:

- Location
- Position/Job Title
- Stage in the buyer's journey
- Persona
- Entry point into the campaign
- Content they have interacted with
- The products they have purchased (or viewed)

Personalization

Personalization consists of tailoring content, offers, communication, and as many other elements of the campaign as possible to accommodate specific individuals. Personalization can be tied to groups or segments of individuals—a primary reason why lead segmentation is so important to a lead nurturing campaign.

In the context of a modern marketing landscape where automation is ever present, it's fully possible to create customized experiences for your leads with the help of analytics and foresight on the part of the marketing team.

Email

Email remains the primary way you communicate one-on-one with your leads and customers throughout a campaign—they are the backbone of lead nurturing. Marketing emails can be divided into three major categories: blast emails, nurturing emails, and drip campaigns.

- **Blast emails**: an email with an offer is sent out to the entirety of the lead database.
- **Drip emails**: Series of emails sent based on well-arranged schedules.
- **Triggered emails**: Sent based off behavioral segmentation of the leads.

While blast emails have their place, primarily bringing initial awareness to a campaign, they lack the personalization and timeliness necessary for a stellar email strategy.

This is where drip and nurturing emails come in, more similar to one another while maintaining a few key differences. In contrast with blast emails, drip emails encourage leads to keep the company top-of-mind as they approach a buying decision and serve to progress a lead to the next stage. Triggered emails, meanwhile, are based off behavioral segmentation of the leads. Custom emails are sent after a lead takes a specific action such as downloading an eBook, visiting a product page, abandoning their online shopping cart, etc. These two varieties of email marketing are most effective when combined with one another.

Lead Nurturing Workflows

A workflow is a set of automated actions triggered by certain events. In a lead nurturing campaign, workflows are used to tie together the pieces of your campaign together in order to progress your lead from one stage of their journey to the next. Actions can include things such as sending an email or SMS message or adding a lead to a segmented list.

For example, if you would like to nurture a lead after they fill out a form on your website, you could utilize a workflow to automatically send them a series of nurture emails over time. You could also trigger a series of emails with a coupon to visitors who place an item in their online shopping cart but fail to follow through on the final purchase.

Workflows can also help bridge the gap between marketing and sales. For example, an email alerting a sales person could be triggered any time a lead crosses the threshold, turning them from a marketing qualified lead to a sales qualified lead. You could also use workflows to update contact information (such as their stage in the sales funnel) based on actions they take with your company on and offline.

Nurture Content

A steady and relevant flow of content on various platforms is imperative in guiding leads and eventually converting them into customers. This goes for everything from the body copy in emails to landing pages to social media posts!

Thoughtful lead nurturing campaigns begin with content mapping, a process in which content is designated to be received by leads at appropriate points throughout the campaign. The 3 stages of the buyer's journey—awareness, consideration, and decision—serve as effective guidelines for content mapping, as do the phases of the marketing funnel.

We will cover each of these in more detail below when we outline the steps to creating a lead nurturing campaign.

Optimization

"Optimization" may sound like a vague term, but aside from general tips like maintaining detailed schedules and keeping campaign content consistent, optimization of a nurturing campaign is founded on a basic principle of "test-and-tweak". A/B testing and closed-loop reporting are primary ways of accomplishing this, as they provide feedback on major elements of your campaign.

A/B testing, in particular, offers a high level of control of your email campaigns. Individual variables can be tested and modified accordingly with nearly the precision of a scientific experiment. But testing is not limited to emails and can be applied to landing pages, social media messages, CTA's, and more.

Reporting and Analytics

Closed-loop analytics refers to how your marketing team can use and exchange information with your sales team to create more comprehensive analytics for a lead nurturing campaign. It creates insight into the entirety of the customer life cycle, from the time they enter the funnel to the point at which they make a purchase. General analytics require the help of the proper software tools, as we'll discuss below.

Operators (Driver/Strategist/Analyst/Technologists)

An operator refers to the type of marketer and/or skill sets needed to execute a nurturing campaign successfully. They may be an existing, permanent member of your marketing team, or acquired from an outside source like a marketing agency.

Automation Tools

Automation at some level is crucial to implementing a lead nurturing campaign. The type of automation software required varies from email automation programs to full-stack marketing automation systems. For more detailed information on choosing the right marketing automation system to fuel your lead nurturing campaign, refer back to *Lesson 3*.

Another important tool needed is a customer relationship management software (CRM), which allows you to synchronize the activities of your sales and marketing teams and record your leads' relationships with your company. General marketing software that manages marketing data, like HubSpot's Marketing and Sales software, is also needed to manage analytics and track the effectiveness of your campaign activities.

Your email campaigns can be managed by entirely standalone clients (e.g., MailChimp, Constant Contact) or integrated with the software mentioned above. Even smaller elements, such as landing page design and email layouts, can also be handled as features in more comprehensive software options like HubSpot Marketing or Marketo, or in standalone platforms.

How to Create a Lead Nurturing Campaign in 6 Steps

The essential steps to follow when creating your lead nurturing campaign are:

1. Determine the goal for your campaign
2. Determine the target audience
3. Map out your buyer's journey
4. Determine what information they need at each step
5. Determine the best offer to provide that information

6. Determine the best way/channel to present your offer

Step 1: Determine the Goal for Your Campaign

Defining the goal of your lead nurturing campaign gives you direction. Without a start, there is no finish. Your goal should be complementary to that of your prospective buyer, effectively benefiting you both.

You can set your goal from the top down—who am I trying to serve with my product or service?

In this case you goal could:

- Solve for the pain points of a particular persona or set of personas.
- Attain more customers from a specific industry or segment.
- Gain more customers who fit your ideal client profile.
- Increase purchases from current customers.

Or you can set it from the bottom up—what product or service am I trying to sell? In this case your goal would be to increase purchases of that product or service or contract renewals.

Or your goal could be focused on improving your processes or efficiency. For example, your goal could be to decrease the time it takes a new lead to make their first purchase or the amount of touchpoints needed to close a sale.

Step 2: Determine the Target Audience

The first step to determining your target audience is knowing your buyer personas. Buyer personas are a semi-fictional representation of your ideal customer, based on market research and real data about your existing customers. If you need help creating your buyer personas, refer back to *Deciding Who to Nurture* from *Lesson 2*.

Now, if your goal was set from the top down, then you may already know who you are targeting. If you set your goals from the bottom up, then you need to ask yourself, "Which of my buyer personas benefit from the product or service I am trying to sell?"

On the other hand, if your goal is focused on improving processes or efficiency, then you need to determine which buyer persona you can target that will have the greatest impact on this goal. For example, if your goal was to decrease the number of touchpoints needed to make a sale, then you probably want to look at the most common buyer persona you have in your database right now—because that is where your efforts will have the greatest business impact.

Once you know which persona you are targeting, you can add on layers such as market segments or company profiles, which we will dive into deeper in the next two lessons.

Step 3: Map Out Your Buyer's Journey

In order to properly outline a lead nurturing strategy, any and all content needs to correlate to its respective stage in the buyer's journey. This requires a good understanding of what the buyer's journey looks like.

Typically, the buyer's journey is segmented into three stages: awareness, consideration, and decision.

- The awareness stage refers to the ***ToFu*** or the ***top of the funnel*** because that's where buyers normally start researching their pain points or goals. This is when people go in search of answers to identify resources and to problem solve.
- The consideration stage refers to the ***MoFu*** or the ***middle of the funnel***. Now that buyers have identified a problem and done some research, this is where they will begin considering all their solutions. After a solution is established, an assessment of solution providers begins.
- The decision stage refers to the ***BoFu*** or the ***bottom of the funnel*** because it is the last stage in the buyer's journey. This is when buyer's make a purchasing decision.

So with each step in the buyer's journey now broken down, what is the best way to position your ToFus, MoFus, and BoFus? After all, a structured outline of your campaign is only as strong as what is actually in it.

While it may seem intuitive to begin from the top down by identifying common pain points and funneling down to your products or services, you can essentially start your campaign from the bottom up so long as you address your product or service first and end with addressing how it solves pain points.

No option is better than the other, so proceed with the style that best suits the goals you set for your campaign.

Step 4: Determine What Information They Need at Each Step

To understand what information your buyer needs at each stage you should ask yourself, or seek the answers to, a series of questions to get inside their heads. We covered these in *Lesson 2*, but as a recap...

To understand your buyer in the **Awareness stage,** ask yourself:

1. How do buyers describe this goal or pain point? (This may not be how you refer to it internally)
2. What are the top causes for this pain point or reasons this goal is not being met?
3. What does your buyer have to gain if this pain point is addressed or goal is met?
4. What are the consequences of inaction by the buyer?
5. Are there common misconceptions buyers have about addressing the goal or challenge?
6. How do buyers decide whether the goal or challenge should be prioritized?
7. How do buyers educate themselves on this goal or challenge? (Where do they look for information, or what types of information speak to them?)

In order to understand the **Consideration stage** for your buyer, ask yourself:

1. What categories of solutions do buyers investigate?
2. How do buyers educate themselves on the various categories?
3. How do buyers perceive the pros and cons of each category?
4. How do buyers decide which category is right for them?

Lastly, the questions you should ask to understand the **Decision stage** for you buyer are:

1. What criteria do buyers use to evaluate the available offerings?
2. When buyers investigate your company's offering, what do they like about it compared to alternatives? What concerns do they have with your offering?
3. Who needs to be involved in the decision? For each person involved, how does their perspective on the decision differ?
4. Do buyers have expectations around trying the offering before they purchase it?

5. Outside of purchasing, do buyers need to make additional preparation, such as implementation plans or training strategies?

Now, at each stage the goal of your content is to provide the answers to these questions for your lead, so they feel prepared to move to the next stage of their journey.

Step 5: Determine the Best Offer and Channel to Provide that Information

Once you understand your buyer and have a clear picture of the information that they need, you must determine the best way to communicate that information to them. This starts by choosing the best format for your offer. Some examples of lead nurturing content formats include:

1. EBooks
2. Workbooks
3. Coupons
4. Free Trials
5. Comparison Guides
6. Consultations
7. Case Studies
8. Webinars

Once you have decided what your offer will be, you need to decide the best channel to communicate that offer. Some examples of lead nurturing channels include:

1. Email
2. Landing Pages
3. Messenger Apps
4. Mobile Marketing (e.g. SMS)
5. Retargeting Ads
6. Dynamic Website Content

The format and channel should be guided by your buyer persona. How do they prefer to intake information and where do they prefer to receive it?

Step 6: Tie It All Together with Automation

The final step is to use automated workflows to connect all of the pieces of your campaign together and progress your lead from one stage of your campaign to the next. The workflows you employ will vary between B2B, B2C, and eCommerce lead nurturing campaigns. Don't worry, we will dive into the workflows needed for each type of campaign in the following two lessons.

But first, just what is the difference between these campaigns?

The Difference Between B2B, B2C, and ECommerce Lead Nurturing Campaigns

The elements of lead nurturing campaigns vary somewhat depending on whether they're designed for B2B (business-to-business), B2C (business-to-customer) or eCommerce marketing.

The reason these campaigns are different is because typically the sales funnel, and the journey your buyer travels down your funnel, looks different across these three markets. So it's important that we understand each.

B2B Nurturing Campaigns

According to a report, 65% of B2B marketers have not established lead nurturing. That could be because it requires heavy coordination between all departments in a company.

B2B marketing typically deals with smaller client databases and longer sales cycles, making a measured and detailed, yet flexible campaign strategy optimal. Campaign promotion all happens at top of funnel, but can change over time (with addition of ToFus, entry points, awareness channels, etc.). The middle of the funnel, in contrast, stays rather constant.

A singular, linear customer pathway characterizes the lead nurturing process: the lead (initially a responsibility of the marketing team) converts to an SQL, being passed to the sales team, and then to a client. With the exception of SaaS or membership models, which incorporate retention and upgrade marketing tactics, repurchase then becomes a sales team and client management responsibility; a lead no longer has marketing value once they convert. The good news for you—once a lead is successfully converted into a customer, you get to pat yourself on the back for a job well done.

B2B lead nurturing campaigns tend to require more work up front when setting up the campaign and laying down your strategy, and less after its launch. In other words, analytics and optimization—though by no means is hands-off—require less effort, typically because a longer period of time is needed to see results and test. Conversions from one stage to the next, taking the form of form fills, serve as primary performance indicators for the campaign.

B2C and ECommerce Nurturing Campaigns

ECommerce and B2C marketing tend to deal with larger customer databases and shorter sales cycles. B2C campaigns are characterized by a top of the funnel that remains constant, while the middle of the funnel is very dynamic. They require a fine-tuned promotional content calendar and a stronger hook, detailed segmentation, and (in the case of eCommerce) need to be fully integrated with your company's online store.

B2C and eCommerce campaigns are higher-maintenance after launch, with constant iterations and optimization needed. That's because, unlike B2B, B2C leads continue to be marketing targets even after becoming customers and their behavior is more prone to fast-paced changes. Furthermore, you are dealing with multiple customer pathways instead of one.

The campaign funnel is primarily email-based, and the email campaign itself necessitates a series which, as we discussed, incorporates a variety of different types of emails. While the top of the funnel (hook) remains stable, the middle changes constantly. Since promotional emails happen in the middle of the funnel, your promotional calendar must be flexible and keep up with the pace. Email opens and click-throughs, as well as product purchases, serve as primary indicators for your lead nurturing campaign.

Feel like you have a better understanding of lead nurturing campaigns? Take your learning to the next level by applying your knowledge in the *Lesson 6 Exercise* below.

Lesson 6 Exercise

Determine Your Campaign Goal and Audience

Refer to the section How to Create a Lead Nurturing Campaign in 6 Steps. Complete Step 1 by determining a goal for your campaign. Remember, you can set your goals from the top down or from the bottom up. Then complete Step 2 by determining the target audience for your campaign.

Campaign Goal:

Target Audience:

Now that you know the difference between these campaigns, we will spend the next two lessons diving into crafting each. Starting with *Lesson 7: Lead Nurturing Campaign for B2B* and followed by *Lesson 8: Lead Nurturing Campaign for B2C and ECommerce*.

LESSON 7: LEAD NURTURING CAMPAIGN FOR B2B

Welcome back to the Lead Nurturing Masterclass! Last lesson you learned how to generally craft a lead nurturing campaign. In this lesson, you'll learn to create a lead nurturing campaign specifically for the realm of selling business-to-business (B2B), where you are typically dealing with longer sales cycles, multiple decision makers, and more complicated products.

In this lesson:

1. The B2B Customer Lifecycle
2. Core Elements of a B2B Lead Nurturing Campaign
3. How to Create a B2B Lead Nurturing Campaign in 4 steps
4. How to Generate Awareness for Your B2B Lead Nurturing Campaign
5. How to Handoff a Lead from Marketing to Sales (a.k.a. Sales and Marketing Alignment)

The B2B Customer Lifecycle

Customer lifecycle is a term used to describe the progression of steps a customer goes through when considering, purchasing, using, and maintaining loyalty to a product or service. While there's no single way to define a customer lifecycle for a B2B business, the following basic lifecycle is a good starting point for most:

1. Visitors/Subscribers
2. Marketing Lead
3. Marketing Qualified Lead
4. Sales Qualified Lead
5. Opportunity
6. Customer

Now as you can see, your job as a marketer is to turn Visitors into Sales Qualified Leads to pass off to your sales team to close into customers.

And how can you do that?

Well, according to DGR's B2B Buyer's Survey, "88% of buyers said that the winning vendor they chose provided a better mix of content to help them through each stage of the research and decision-making processes."

But industry experts point out that connecting the dots—and the content—in ways that mirror the customer journey, is crucial. And that's exactly what your lead nurturing campaign will do!

So, let's get into how you can guide, educate, and delight your B2B buyers.

Core Elements of a B2B Lead Nurturing Campaign

As covered in *Lesson 6: Lead Nurturing Campaigns*, the core pieces for building a lead nurturing campaign include:

- Lead Magnets
- Landing Pages
- Personalization and Segmentation

- Emails
- Workflows
- Nurture Content
- Reporting and Analytics
- Optimization
- Operator
- Automation Tools

So as not to be repetitive—but rather build upon the last lesson—we'll discuss how each piece of a lead nurturing campaign can be designed for your B2B-targeted audience.

Hook (a.k.a. Lead Magnet)

The reality is that most B2B buyers are not going to be ready to make a purchase the first time they come into contact with your brand or land on your website. So the main goal of your hook or lead magnet is to attract a visitor to your website and convert them into a lead in your database. That way you can learn more about them and further your relationship, even though they are unready to purchase at that time.

With this in mind, your lead magnet should focus on engaging unaware prospects and website visitors. Remember this audience hasn't provided you much information other than how they interact with your company in a minimal manner, such as coincidentally viewing one or more similarly focused blog posts on your website.

To create an attractive and valuable B2B lead magnet, you must help your buyer identify a challenge they have, an opportunity they want to pursue, or provide an answer to one of their questions.

Landing Pages

Landing pages are a primary means of hosting your lead magnet, as well as presenting premium content at later stages of your funnel. Revolving around presenting your lead with the opportunity to provide their information in exchange for a promising offer, landing pages should be focused on conversion. While design does matter, the creative effort put into your page will be for nothing if it doesn't compel leads to submit the form!

Elements that prove effective in converting a B2B audience on landing pages, include all that was stated in *Lesson 6*, as well as:

- Trust building elements such as testimonials and trust logos
- Bullet points outlining the key benefits of your offer
- A highlight as to who would benefit from your offer (e.g., ideal for those responsible for marketing operations at their company)

Annual benchmarks for B2B landing pages include:

- **Average Views-To-Submission Rate:** 20%
- **Exit Rate:** Under 50%
- **Bounce Rate:** Under 60%
- **Average Time on Page:** 2 minutes

Personalization and Segmentation

What's unique about a B2B targeted audience? In B2B, more so than B2C, a more personal relationship needs to be forged between the individual marketer and the buyer. Therefore, personalization should also be utilized on the sender's side, meaning content and offers should be sent from a specific person within the marketing team or company rather than from the brand.

But, personalization for B2B audiences is not just about adding a first name token to your email greeting—it is all about providing your lead with the content they need, when they need it. How do you do this with your lead nurturing campaign? By segmenting leads according to their needs, understood by touchpoints they made along converting from one stage of the buyer's journey to the next.

Segmenting B2B leads should take into account:

- A lead's stage in the buyer's journey;
- The lead's persona;
- The lead's entry point into your marketing process; and
- Content a lead has interacted with.

Further segmentation can be executed on by looking at a lead's "firmographics", such as company criteria like:

- Size;
- Industry;
- Location; and
- Technologies.

With this information in hand, you can properly assess your leads' needs and respond with the best-fit actions or content. Offering this more personalized experience will often set you apart from competitors who are running on a one-size fits all approach.

Emails

B2B audiences tend to have longer buyer's journeys than B2C audiences. Why? Because, often, they require greater awareness about the problem they face, needing more education in how to solve for it, as well as why your company will provide them the best solution for them.

Email drips help solve for this by taking a hands-off, nurturing approach. Email drips are a series of scheduled emails, used to encourage a lead to access the next content piece in your funnel or take a desired action. An email drip is essential to your lead nurturing campaign because they offer a guaranteed way to attend to the needs of a lead if, say, they have a foot in the door or are stuck in the middle of your funnel. They offer a personalized approach even when a one-on-one conversation can't be met.

When delivering emails to B2B audiences, you should take note of the kinds of emails that perform best at each stage of their buyer's journey. You should also seriously evaluate the purpose for sending the email. If you can't answer yes to the following questions, you probably shouldn't be sending it:

- Does this email help build a relationship between the lead and your brand?
- Does this email help the lead progress further in their journey?
- Does this email provide value to the lead?

Workflows

Workflows in lead nurturing campaigns primarily function to guide a lead from one stage of your funnel to the next. This is incredibly important for re-engaging lost leads, those who do not convert immediately. These workflows, triggered whenever a lead fills out a form to claim one of your offers, automate the sending of a series of messages, in B2B these are typically emails. The emails serve to introduce and promote the next offer in your funnel. So, the goal of your workflow is for a lead to fill out the form to claim your next offer.

Now, how many emails should you include in each workflow? We suggest starting with a series of three emails that include the following:

- **Email 1**: A thank you for downloading the previous offer and a CTA to access that offer on your thank you landing page.
- **Email 2**: An introduction to the next offer and a CTA leading them to the next landing page in your series.
- **Email 3**: A promotion of the next offer and a CTA leading them to the next landing page in your series.

You may find over time that more (or less) emails are needed to get your leads to convert. That's why it's important to analyze and optimize your campaign over time, not just set it and forget it—a topic we will cover more deeply in *Lesson 9*.

Workflows can also help bridge the gap between marketing and sales. For example, an email alerting a sales person could be triggered anytime a lead crosses the threshold turning them from a marketing qualified lead to a sales qualified lead. You could also use workflows to update contact information (such as a stage in the sales funnel) based on actions they take with your company on and offline.

Nurture Content

Nurture content in B2B primarily comes in the form of premium educational content that helps your buyer evaluate the different approaches or methods available to pursue their goal or solve their challenge. This point in the journey also marks a point of extended engagement where you are nurturing a lead, building a relationship, and establishing trust between the potential buyer and your brand.

Because the buyer's journey tends to be longer and more complicated in B2B, several pieces of content are often required to successfully move them through the consideration and decision-making stages.

Examples of B2B nurture content include:

1. Case Studies

2. Whitepapers
3. Comparison Guides

Post-purchase Nurturing Content

Once a lead becomes a customer, your job as a marketer doesn't end. In fact, you should be heavily invested in retaining their loyalty. Why? It is 5 times more expensive to acquire a new customer than it is to retain a current one. Furthermore, a happy customer can turn into an evangelist for your company—providing word of mouth marketing and referrals, which are incredibly powerful in B2B marketing.

Content focused on delighting the customer should:

1. Help them get maximum value from your products or services. For example, provide use cases describing how clients are leveraging your product or service, share interesting case studies that demonstrate functionality, or hold client-only webinars that train them in using various features.
2. Provide them useful information related to their industry and your product or service. For example, send a client newsletter once or twice a month with a collection of articles you have curated, and provide a brief summary with a link to read the full article.
3. Build trust and deepen relationships between the customer and your company. For example, invite them to an exclusive event you are hosting. This lets them know you think of them as part of a bigger family, even if they don't attend.

Reporting and Analytics

Analytics serve the crucial purpose of exposing the "leaky" parts of your funnel—places in which leads are failing to convert at expected levels. Because each B2B funnel set up is so customized, it is best to determine individual benchmarks to compare to rather than apply generic industry standards.

To fully understand the effectiveness of your B2B lead nurturing campaign, it's incredibly important to have closed-loop reporting set up. This will likely involve working with your sales team and ensuring your marketing automation system and CRM are sharing data.

The best metrics to focus on are those that are conversion-focused, including:

- Landing page submission rates
- Email open and click-through rates
- Engagement with nurturing content (read/watch time and percentage)
- Workflow goal completion rates
- MQL to SQL rate
- Funnel completion rate and length
- Sales cycle length
- Cost per customer acquisition

Reporting on these analytics enable you to better understand which aspects of your B2B lead nurturing campaign are performing up to standards and which are candidates for optimization.

Optimization

With longer sales cycles, B2B lead nurturing campaigns often take a while to collect enough data to gain insights into many optimization opportunities; and the smaller databases often lack sufficient data for more complicated testing, like multivariate testing. However, it is fully possible to begin with more simple testing.

A/B testing is perfect for this type of campaign. Landing pages, email subject lines, and offer types can all be tailored to maximum effectiveness—provided you have the patience necessary to gather enough data to determine whether, and which, changes are making an impact.

We will dive much more deeply into testing and optimizing your lead nurturing campaign in *Lesson 9*.

Operator

Your B2B lead nurturing campaign operator should be heavy on upfront strategy, especially content strategy. They also need to possess some technical capabilities to set up the automated elements of the campaign, and analytical skills to monitor progress and effectiveness over the longer sales cycle. Can't find one person who can do it all? That's okay, these tasks can be delegated to multiple people who hold the necessary skill sets.

Automation Tools

A B2B lead nurturing campaign will not get off the ground without marketing automation. While email marketing may be what comes to mind when you consider “automation”, a B2B lead nurturing campaign will require more than just email automation. What do we mean by this?

A B2B lead nurturing campaign also requires programs to organize and segment leads, track contact behavior, create and optimize landing pages and forms, personalize content, provide analytics, and more. And you want it all to integrate fluidly together to remove operational inefficiencies.

So honestly, you’re best bet is to invest in a comprehensive marketing automation platform that can handle all of these tasks in one place. Your primary options are:

- HubSpot
- Pardot
- Salesforce Marketing Cloud
- Marketo

Each marketing automation system has its pros and cons, but information is readily available to review for comparison by visiting websites like G2Crowd. We also cover many of these platforms, and how to choose the right one for you in *Lesson 3*.

How to Create a B2B Lead Nurturing Campaign in 4 Steps

Covered in the last lesson were several steps you should take when creating a lead nurturing campaign (in general). Now, we’ll cover the steps needed when creating a B2B lead nurturing campaign.

The 4 Steps to Creating a B2B Lead Nurturing Campaign:

1. Define the goal of your lead nurturing campaign.
2. Determine your target audience.
3. Create content for each stage of the buyer’s journey.
4. Tie it all together with automation.

Step 1: How to Define a Goal for Your B2B Lead Nurturing Campaign

Defining the goal of your B2B lead nurturing campaign gives you directive. Without a start, there is no finish. Your goal should be complementary to that of your prospective buyer, effectively benefiting you both. Knowing your goal beforehand also ensures your content targets the right audience's problems with the right solutions.

One way to approach goal setting is to think about it from the top down—what persona, market segment, or type of buyer am I trying to attract? In this case, your goal could be:

1. Solve for the pain points of a particular persona or set of personas.
2. Attain more customers from a specific industry or segment.
3. Gain more customers who fit your ideal client profile.
4. Increase purchases from current customers.

Another way to set your goal is from the bottom up—what product or service would you like to push right now? In this case your goals could be:

1. Increase purchases for a particular product or service.
2. Increase subscription sign-ups.
3. Increase registrations for an event.
4. Increase license/contract renewals.

Or it could be that you are trying to improve your sales process by speeding it up or making it more efficient. In this case your goals could be:

1. Decrease the time it takes a new lead to close as a customer (e.g., time to customer conversion)
2. Decrease the number of manual touch points needed to close a sale.
3. Decrease the cost per customer acquisition.

What are good B2B lead nurturing campaign goals?

In order for your goal to be "good" you need to take your general goal and make it S.M.A.R.T., as we covered in *Lesson 6*. For example, if your general goal was to sell more CRM software licenses, then your S.M.A.R.T. goal could be:

Sell 450 CRM licenses in Q4 by implementing a lead nurturing campaign.

Now you may also have some leading indicators or sub-goals for your primary goal. For example, if your goal is to sell 450 CRM licenses in Q4, then some subgoals might be:

1. Increase click-through rates on lead nurturing emails by 10%.
2. Increase MoFu landing page submission rates by 10%.
3. Increase BoFu workflow completion rates by 1%.
4. Increase customer satisfaction with the sales process by 1 point (10 pt. scale).

Step 2: Determine Your B2B Target Audience

In B2B, your target audience for your campaign will be determined by two things:

1. Your buyer persona
2. Your ideal client profile

If your goal was set from the top down (i.e., focused on attracting a particular customer) then you may already know at least one of these. If your goal was created from the bottom up, then you need to work backwards to determine which of your buyer persona's this particular product or service solves for. If you have not already created buyer personas or an ideal client profile for your company, you must do this before moving forward.

B2B Buyer Personas

As a reminder, buyer personas are a semi-fictional representation of your ideal customer, based on market research and real data about your existing customers. When creating a B2B buyer persona you want to think about your persona in the context of work. So when thinking about their goals, ask yourself, "what are they trying to accomplish at work?"

In addition to items covered in *Lesson 6*, in the case of the B2B buyer persona, you also want to include:

1. **Job Responsibilities** - What are they responsible for at work?
2. **Performance Measurement** - How is their job performance measured? (e.g., revenue generated, team productivity, products delivered)

3. **Challenges** - What are their biggest internal and external challenges at work?
4. **Vendor Communication** - How do they prefer to communicate and interact with vendors? (e.g. email, phone, SMS, face-to-face, web chat)

In some marketing automation systems, such as HubSpot, you can even use buyer personas to base segmented contact lists on, to better target audiences with nurturing workflows.

Ideal Client Profiles

Ideal client profiles, on the other hand, are outlines of the ideal type of company you want to work with. Some very high-level items you can use to define this profile are:

- Industry
- Demographics
- Location
- Revenue

Think about your ideal client profile as the type of company you want to attract and your buyer persona as the person who works at that company—because we communicate with people, not companies.

Now to create your target audience you put the two together. For example, you may be targeting your persona, Marketing Mary, but you particularly want to attract Marketing Mary's who work at companies that do at least 5 million in revenue and have at least one person dedicated solely to marketing—that is the target of your campaign!

Step 3: Create Content for Each Stage of Your B2B Target's Buyer's Journey

Mapping out your campaign content involves determining what educational information your buyer needs at each step of their buyer's journey and determining the best (most conversion-oriented) channels to communicate and promote that content offer.

To map out your target's buyer's journey, you'll first need to understand what information your audience needs at each stage of the buyer's journey.

Remember, the three stages of a buyer's journey are:

- The Awareness Stage
- The Consideration Stage
- The Decision Stage

Awareness Stage Content

The awareness stage is when your persona first senses they are experiencing a problem, or perhaps they are still even unaware of the problem they face. The goal at the end of engaging with your content is for your buyer to have identified their challenge or goal and decided to take action on it. Refer to *Lesson 6* for an outline of the questions you need to answer with your awareness stage content.

If you are able to provide these answers to your potential buyers, you are ready to create content! Since this is the first time you are reaching out to these prospects, it's important to create a visually appealing piece of content that not only looks professional, but gives value.

Awareness stage B2B lead nurturing content can include:

- **EBooks/Guides** to offer leads an educational guide to follow while also positioning your brand favorably and as a trusted source of information.
- **Workbooks** to allow your leads to develop their own custom results based on your methodologies.
- **Checklists** to show your leads the steps needed to complete a process. A list can help leads learn the tasks needed to complete a project, determine what stage they are at in a process, or aid in accountability.
- **Assessments** to ask questions that deliver a consultative result. They can establish benchmarks or even suggest solutions based on fit.

Consideration Stage Content

In the consideration stage, or middle of the funnel, your B2B buyer has identified the problem they have or goal they want to pursue, and that this is a priority. They are just now beginning to evaluate the possible solutions to their problem. So, this is the stage where you begin to make a case for why your solution is the best fit.

Also, at this stage, you want to help potential leads determine if they are not a good fit for your solution, which is important for customer retention in the long run. Remember, you are only interested in qualified leads!

It is important to note, that often before you can present a case for your solution, you need to help your lead evaluate the different categories of solutions available to them, not just the category you fall into. Likewise, several pieces of content may be required at this stage, especially for longer sales cycles or more complicated products/services. Once again, refer to *Lesson 6* for an outline of the questions you need to answer to understand the Consideration stage for your buyer.

Once you understand the Consideration stage for your buyer you need to create a piece of content that includes the answers to these questions. The goal at the end of engaging with this content is for buyer's to have selected the category of solution that is right for them and added you to the list of possible providers.

Consideration stage B2B lead nurturing content include:

- **Comparison Guides** to help leads evaluate various solution categories and/or providers side-by-side.
- **Whitepapers** to offer in-depth, problem-solving guides to a lead.
- **Webinars** to engage and educate leads in a live manner on solution-based information regarding their problem.
- **Case Studies** to entice a lead with previous successes of yours, providing social proof for your leads.

Decision Stage Content

In the decision stage, or bottom of the funnel, your B2B buyer has decided on the category of solutions that is right for them and may even have a short list of providers. Now, they need a last deserving nudge in the right direction toward choosing you. In other words, you really need to differentiate yourself from the competitors in your category.

Often times in the decision stage, you will see the introduction of additional decision makers, also known as a sales persona. Up to this point, you may have been marketing to a research persona, who may still have some influence in the decision to buy, but now you need to also address your sales persona's pain points and common objections.

Once you understand the decision stage for your buyer (refer to *Lesson 6*), you have to determine the best offer to answer their questions and assure the "who" they buy their solution from is YOU.

Decision stage lead nurturing offers can include:

- **Product/Service Demos** to position your brand to your target audience.
- **Free Trials** to educate leads freely and empower them to learn autonomously.
- **Free Consultations** to give your lead a feel for the value you can provide.
- **Pricing Quotes** to help your buyer determine what is needed to move forward with purchasing.

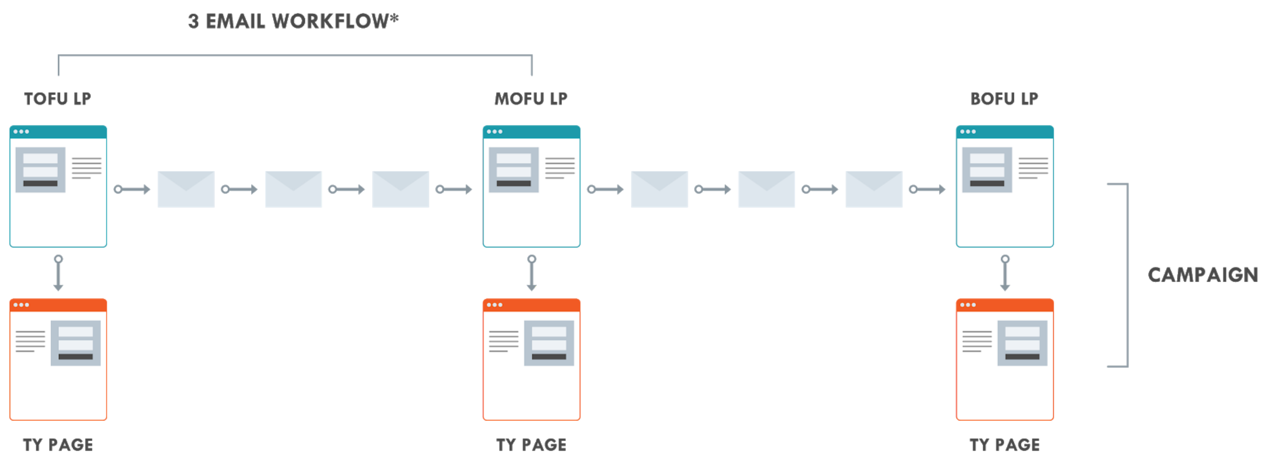
Step 4: Tie Your Campaign Together with B2B Marketing Automation Software

Once you have created offers to match each stage of the buyer's journey, you need to link these pieces together to create a funnel for your leads to travel down.

To do this you need to:

1. Upload your premium content to your Content Management System.
2. Create an organizational structure for your campaign assets in your marketing automation system.
3. Build a landing page to host each offer.
4. Build a thank you page to deliver each offer.
5. Create lead nurturing emails to guide leads to the next stage.
6. Create workflows to automate the sending of these emails.

So, your final campaign will look something like this:



Generate Awareness for Your B2B Lead Nurturing Campaign

Now that you have created your campaign, you need to generate awareness for it. Why? Well, if no one enters the top of your campaign funnel, no one will ever reach the bottom. If we look at effects of generating awareness in a linear way, we see that it brings more visitors to your website whom can convert into leads, enter your campaign, and (down the line) turn into customers.

So, what does it mean to generate awareness for your B2B lead nurturing campaign? It means to attract the community your target audience is a part of. It means casting a large net in efforts to capture leads.

To generate awareness for your B2B audience, consider several awareness stage marketing tactics:

1. Use your lead magnet as the offer in a Paid Ad.
2. Offer your lead magnet to prospects on LinkedIn who match your persona and fit your ideal client profile.
3. Include links to your lead magnet in relevant blogs or in pop-ups on relevant pages of your website.

4. Create videos on LinkedIn or YouTube that provide inherent value, but also include a call to action to access your lead magnet.
5. Add a hyperlink to the lead magnet in your marketing and sales team member's email signature.
6. Share your lead magnet on your company and employee's social media accounts.
7. Send a blast email to your database promoting your lead magnet.
8. Print postcards promoting your lead magnet to pass out at events or mail to prospects.

The list goes on, but the most important thing is to continually feed the top of your funnel so all of your hard work crafting your campaign does not go to waste.

How to Handoff a Nurtured Lead from Marketing to Sales (a.k.a. Sales and Marketing Alignment)

Speaking of your hard work going to waste, you also want to make sure that the fruits of your labor are capitalized on by your sales team.

Unfortunately, due to the extended buyer's journey your lead might face in B2B, contact records and data often go missing in the transfer to sales, and that can create a negative impact on the buyer when being handed-off from marketing to sales.

That's why constant data sharing and alignment between the two teams is key. Doing so helps eliminate any friction that your lead might experience, which results in a happier, more delighted buyer.

This goes by the term: **Smarketing**, which is the alignment of sales and marketing.

Effectually, sales and marketing share common goals. Most importantly, they share an end goal of getting the successful conversion. In order to do so, they both utilize tools, such as creating buyer personas as well as using an integrated approach for nurturing a lead into a conversion.

To align sales and marketing, it's about leveraging contact data. That means looking at a lead's touchpoints with your brand during each stage of their buyer's journey and your sales process. One way to ensure this is by integrating website analytics and a customer relationship management (CRM) software. The integration of these two types of software allows sharing of information between one and the other, which allows for sales and marketing teams to close the loop by providing a great customer experience.

Another way to close the gap between marketing and sales teams is by creating a workflow that will alert sales when a bottom of the funnel form is filled out, or when a lead hits a threshold lead score. This message can provide your sales person with the key information needed to make personalized and informed outreach quickly.

Additionally, if your company is larger in size and includes multiple sales teams, you can set up workflows that route leads to specific people, based on region, industry, or any other demographic information. Alerts for either the aforementioned or latter mentioned can be set up for over email, text, or desktop notification.

Feel like you have a better understanding of lead nurturing campaigns for B2B companies? Take your learning to the next level by applying your knowledge in the *Lesson 7 Exercise* below.

Lesson 7 Exercise

Brainstorm Your Lead Nurturing Offers

Refer back to the exercise you completed in *Lesson 2—Map Out Your Buyer's Journey*. Use your map to brainstorm a piece of content or offer that you could provide your persona at each stage of their buyer's journey.

1. Awareness Stage
Brainstorm an offer that helps your persona identify their paint point or goal. This can be in the form of a checklist, quiz, guide, workbook, or assessment.

2. Consideration Stage
Think of an offer that could help your persona choose a solution category. This can be in the form of a whitepaper, eBook, webinar, or video.

3. Decision Stage
Brainstorm an offer that could help your persona decide to buy from you. This can be in the form of a case study, success story, consultation, coupon, or demo.

In *Lesson 8* of the Lead Nurturing Masterclass, we'll be covering in detail how to craft lead nurturing campaigns for B2C and eCommerce. If you aren't interested in B2C campaigns, skip ahead to *Lesson 9* to learn how to optimize your lead nurturing campaign.

LESSON 8: LEAD NURTURING CAMPAIGN FOR ECOMMERCE AND B2C

Welcome back to the Lead Nurturing Masterclass! In this lesson, you will learn how to create a lead nurturing campaign for your eCommerce or B2C (business-to-customer) company where sales cycles are typically shorter, products are less complicated and you are catering to a single decision maker. But that doesn't make B2C lead nurturing easier! You also have to deal with larger customer databases and behavior that can be more fickle, making for a highly hands-on approach after launch. Not to mention the fact that once a lead converts to a customer they are still a target for marketing—so your job never really ends!

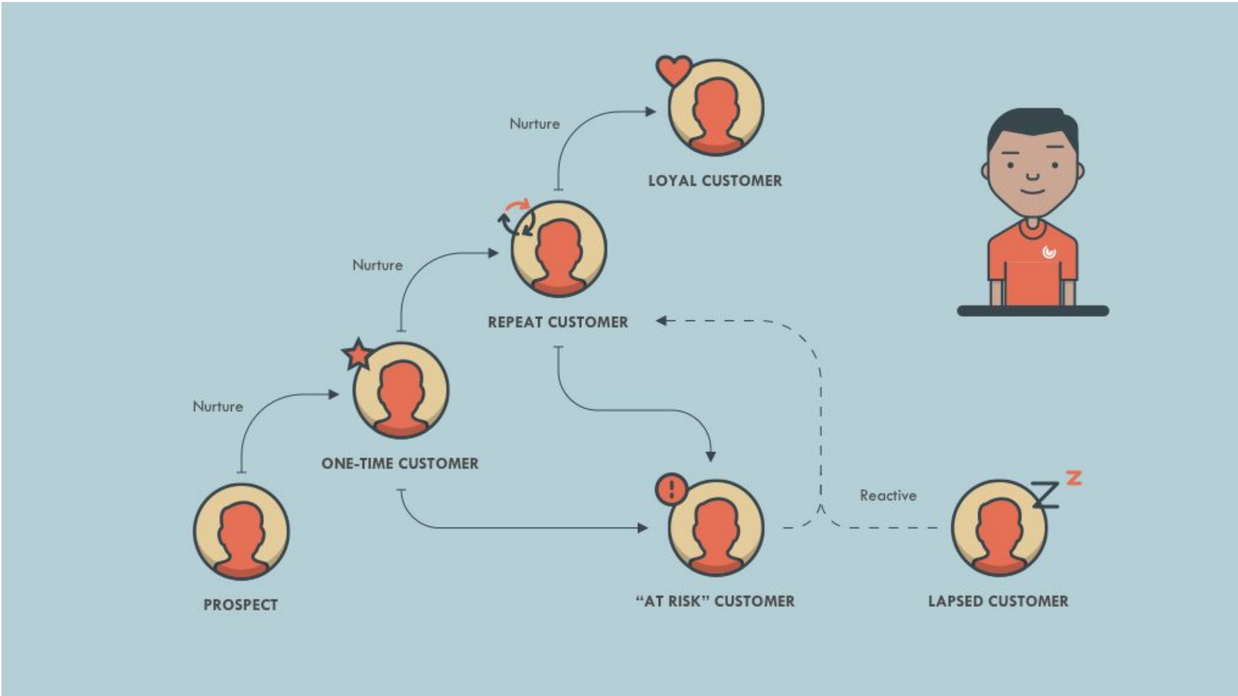
In this lesson:

1. The ECommerce and B2C Customer Lifecycle
2. Core Elements of an ECommerce and B2C Lead Nurturing Campaign
3. How to Create an ECommerce and B2C Lead Nurturing Campaign in 5 Steps
4. Continued Nurturing: The Role of a Promotional Calendar

The ECommerce and B2C Customer Lifecycle

Customer lifecycle is a term used to describe the progression of steps a customer goes through when considering, purchasing, using, and maintaining loyalty to a product or service. While there's no single way to define a customer lifecycle for an eCommerce or B2C business, the following basic lifecycle is a good starting point for most:

1. Prospects (a.k.a. Potential Buyers)
2. First-time buyers (a.k.a. One-time Purchasers)
3. Repeat Customers
4. Loyal Customers



Now as mentioned, the moment a prospect becomes a customer, this does not mark the end of the relationship you, as a marketer, have with them. In fact, it is your job not only to motivate a prospect to make their first purchase but to manage the entire lifecycle turning them into repeat and loyal customers.

Why is it Important for You to Manage the Customer's Lifecycle?

Simply put: You can't build a sustainable eCommerce or B2C business without repeat customers. The primary reasons you need to focus on repeat business are:

1. The cost to acquire a customer will continue to rise because there are limited customer acquisition channels.
2. It is much easier (and cheaper) to convert and retain an existing customer than to acquire a new one.
3. A loyal customer will not only purchase more, they will also spread the word for you and bring additional customers.

Now, how can you manage the entire customer lifecycle? With lead nurturing campaigns targeted at progressing your prospects through these stages until they become a loyal customer (and then keeping them there).

Core Elements of an ECommerce and B2C Lead Nurturing Campaign

Before we dive into any specific lead nurturing campaigns, let's dive into the pieces you will need. As covered in *Lesson 6*, the core pieces for a building a lead nurturing campaign include:

- Hook
- Landing Pages
- Personalization and Segmentation
- Emails
- Workflows
- Nurture Content
- Reporting and Analytics
- Optimization
- Operator
- Automation Tools

Here, we will discuss how each element of a lead nurturing campaign can be designed for your eCommerce or B2C target audience.

Hook (a.k.a. Offer)

In the case of eCommerce, your hook is the promotional offer that captures a lead's interest and their information in your form. This piece should provide value in a fairly straightforward way, as opposed to B2B hooks, which can often focus on education and provide value via information.

Examples of good B2C offers include:

- Percentage-based discounts
- Free shipping

- Buy-one-get-one free (BOGO)
- Quantity discounts
- Reward points
- Member savings

On the one hand, these are very straightforward offers so you can keep their design simple. On the other hand, you must make sure that the promotion is relevant and generous enough to fit your customers' needs and wishes.

Landing Pages

Unlike traditional landing pages used in B2B, product pages and pop-ups are the main format taken by landing pages in B2C nurturing. Audiences have shorter interaction with these types of landing pages. Therefore, they should be designed with visually compelling elements, taking into consideration colors, images, spacing, and any other important branding elements. However, these all should be used with tact, not distracting the viewer from the offer, but rather complementing it.

The purpose of these landing pages should still be about conversion. That's why a strong call to action (CTA) is crucial to getting leads to take your desired action—whether it's to join your mailing list or receive a discount code.

The desired action itself? Well, that depends on the landing page. Is it a product page? Then the desired action is a purchase. Is it a pop-up discounted offer? Then the goal is to capture their email. The nature of the offer is central to the landing page, but so is its presentation.

It's a good idea to conduct search engine optimization on your eCommerce and B2C product pages so they can be found organically. Another tool to employ to optimize your landing page and pop-up conversion rates, which will be discussed later in-depth, is A/B testing.

Personalization and Segmentation

In eCommerce and B2C, customer databases are large and sales cycles are short. Entrepreneurs are taught to treat customers like the individuals they are. And when scaling from one to one hundred orders, that is somewhat manageable. But when brands begin servicing hundreds of customers at a time, it's incredibly difficult to sustain highly personalized customer service and marketing efforts. The result—store owners start to take a blanket approach to promoting their products, with a universal message, targeting a single sort of consumer.

But, 74% of online consumers get frustrated with brands when content (e.g. offers, ads, and promotions) appear to have nothing to do with their interests. Today's marketing content needs to adapt to individual customers' precise interests. You can't just send email blasts with one-size-fits-all messages. That's why personalization and lead segmentation is crucial for setting your company apart from competitors.

In fact, according to the DMA, marketers have found a 760% increase in email revenue from segmented campaigns.

Segmentation gives marketers an efficient way to group customers by demographic information, purchase history, browsing activity, etc. so they can tailor email messages to specific groups.

Six broad customer segmentation criteria you can start with are:

1. Demographics
2. Customer lifetime value (LTV)
3. Lifecycle stage
4. Purchasing habits
5. Multi-channel behavior and lead source
6. Buyer personas and psychographics

Before you invest in nurturing a particular customer segment, Harvard Business Review editor Gretchen Gavett recommends that it meet the following criteria:

1. **The segment is identifiable**. There are clear defining traits of your selected customer segment, and it is easy to measure their reactions to certain marketing campaigns and their purchasing behavior.
2. **The segment is substantial.** It is expensive to market to each customer segment, so make sure any group you focus on has enough members who can drive meaningful revenue.
3. **The segment is accessible.** There should be clear ways to communicate with these customers at scale, whether it is over email, SMS, or display advertising.

4. **The segment is stable.** The definition for your customer segments should not change frequently.
5. **The customer segment is differentiable.** Each of your customer segments should have distinct communication preferences and unique needs that they want stores to directly address. Marketers may want to consolidate groups that share the same communication preferences and needs.
6. **The customer segment is actionable**. You should be able to design campaigns that actually mobilize these buyers to take action.

As mentioned, eCommerce and B2C leads continue to be targets for marketing even upon becoming a customer. So, one of the most common applications of customer segmentation for lead nurturing is with lifecycle marketing. We covered the basic lifecycle earlier but you can further divide repeat customers into 3 groups. Your lifecycle segments will look like this:

1. **All Customers** - Start with your full customer list. From here, you can start creating custom segments.
2. **Potential Customers (a.k.a. Prospects)** - These contacts have never purchased with you before, but have either submitted their email in exchange for a promotion, signed up for your email newsletter, or created a shopping account and abandoned their cart.
3. **First-Time Buyers (a.k.a. One-time buyers)** - These are customers who have only completed a single purchase with you.
4. **Repeat Customers** - Customers who have made two or more separate purchases.
5. **Loyal Customers (a.k.a. Active Repeat Customers)** - These customers have placed multiple orders in a short time frame. Calculate the average time each customer waits between purchases. Then, label the ones who complete repeat purchases within that timeframe as “active repeat customers”.
6. **At-Risk Repeat Customers** - At-risk repeat customers made multiple purchases in the past but have let more time lapse since their last order than the average time all of your customers typically wait between orders.
7. **Inactive Repeat Customers (a.k.a. Idle, lapsed, and latent customers)** - These are customers who have placed multiple orders with you before but they have not placed another order for more than three times the average time customers spend between orders.

By segmenting your customers into smaller groups you are set up to provide them with specific, relevant lead nurturing campaigns.

Emails

The majority of your eCommerce or B2C campaign's nurture content will be email.

Triggers for emails include customer behaviors or certain events, such as abandoning a cart, signing up for an email list, visiting a product page, or making their first purchase. Your nurture email series must fit the unique needs of the customers while taking considerations specific to eCommerce into account, such as striking the right tone and scheduling for certain times of day.

While B2B emails tend to be more professional in manner and largely informative, B2C emails prioritize entertainment and aesthetics to a much greater degree. They also tend to be more design heavy and less personal.

We cover email in more detail below when we discuss MoFu/nurture content.

Workflows

ECommerce and B2C workflows are typically more complex than in B2B, because the number of engagement channels are greater. These channels include, but aren't limited to:

- Email
- Social
- SMS
- Messenger Apps
- Retargeting Ads (social and display)

With multi-channel engagement, an eCommerce or B2C brand is expected to reach customers over the channel of greatest convenience to the user. This means that a brand is expected to reach the customer at the channel that is most convenient to them at a given point in time. While email is a vital element of your nurturing strategy, it's just one component of the workflows involved.

Though the topic will be covered more in-depth later, marketing automation allows marketers to connect all the dots of sending the right messages, content, and campaigns to customers at the right time and over the right channel. Furthermore, a system of alerts and rules based mainly around certain actions (or types of actions) customers take are responsible for triggering automated workflows.

Nurture Content

Each eCommerce or B2C lead nurturing campaign will be comprised of a series of messages—primarily delivered via email, but also through SMS, retargeting Ads, or Messenger. The nature of the campaign is determined by the goal for the campaign and the targeted lifecycle segment. The content contained within each message can then be personalized to account for the customer's purchasing habits (i.e., what products they purchased and when) and their buyer personas.

Some lead nurturing campaigns are targeted at turning potential customers into customers such as promotional campaigns, unused offer campaigns, retargeting ad campaigns, and abandon cart campaigns. Let's take the abandoned cart campaign as an example. This campaign is sent to potential customers who created a shopping account, but abandoned their cart. The goal of the nurturing series is for them to return to their cart and complete the purchase. As a general template:

- Email 1 reminds them of the particular items they left in their cart
- Email 2 provides them a small discount on the items in their cart
- Email 3 offers a slightly larger discount on the items in their cart

Other lead nurturing campaigns are targeted at customers and the content can take on several forms based on their behavior and lifecycle stage, such as:

- Order replenishment/repurchasing reminder
- Email newsletters with exclusive content, promotional campaigns, and discounts
- Post-purchase email series
- Up-sell/Cross-sell email
- Welcome or educational email series
- Anniversary emails
- Time-sensitive coupons
- Direct mail catalogs, coupons, or free product sample

- Free shipping offers
- Win-back campaigns
- “We miss you” prompts
- “How can we help?” questionnaires

In order to be most successful in motivating your target audience into action, refer back to your buyer personas and make sure your content:

- Speaks to their goals and pain points
- Expresses how your solution meets their goals or addresses their pain point
- Addresses objections they may have to your solution

In Step 3 of the next section, we cover in more detail how to choose the right campaign content based on your goal and targeted segment.

Reporting and Analytics

Nurturing revolves around gaining an understanding of the customer base, and analytical data is just the way to accomplish this. Analytics help in determining everything from the nature of future offers, to which customer segments they should reach, to the timing for the arrival of the offers.

“44% of B2C marketers leverage data analytics to boost their companies’ responsiveness.”

B2C reporting produces more instantaneous results than B2B, due to sales cycles being shorter and customer databases being larger. You don’t have to wait 3 months to see if an email you sent resulted in an increase in sales, you will know within a few hours of sending!

Optimization

With shorter sales cycles, B2C marketing is conducive to fast-paced data collection to gain insights into many optimization opportunities. The flip side of this is that constant optimization, particularly in the middle of the campaign funnel, is a virtual must.

Larger customer databases open the door for more complex testing and iterations. An example is multivariate testing, in which multiple variables are modified (as opposed to techniques like A/B testing, which focus on one at a time—though there is still room for them in a B2C campaign!).

The goal of multivariate testing is to determine which combination of variations produces the best possible results. On a product page, for instance, three variations of an image may be combined with two variations of a headline to create six versions of the content, which will be tested side-by-side. This type of test is only possible with the greater amount of traffic that eCommerce and B2C sites tend to see.

Operator

Your operator should primarily be an analyst, a data-driven marketer. Additionally, they need to be a master of the array of technological tools used to power and analyze your campaign. Ideally, they will have training in conversion rate optimization and experimentation.

Automation Tools

The tools required by an eCommerce or B2C company, of course, include a website (or eCommerce store) as well as email automation that integrates with the site. Everything from social media management to website maintenance to landing page optimization to analytics, will also require technological oversight.

General automation is very important so that each workflow in your campaign is connected and flawlessly targets multiple channels for best results. However, certain elements more specific to B2C also require attention, such as website pop-ups and your promotional SMS channel. A combination of tools (which there is luckily no shortage of!) will most likely need to be used in order to juggle a multi-channel campaign strategy.

In the case of eCommerce or B2C nurturing you want your core automation platform to include the following features:

- Comprehensive automated scheduling system
- Subject line and body personalization with contact information
- Custom email templates
- High capacity for running multiple kinds of campaigns simultaneously
- Email analytics
- A/B testing
- Advanced segmentation
- Revenue reporting

- Custom workflows

Additional features that are nice to have are:

- Product recommendation engines
- Single-use coupon capability
- On-site behavioral tracking
- Pop-ups
- SMS messages
- Visual workflows
- Purchase intent scoring
- Facebook advertising
- Email throttling
- Real-time tracking

How to Create an ECommerce and B2C Lead Nurturing Campaign in 5 Steps

The 5 Steps to Creating a B2B Lead Nurturing Campaign:

1. Define the goal of your campaign.
2. Determine your target segment.
3. Choose the right campaign for your goal and segment.
4. Create content for your campaign.
5. Tie it together with automation.

Step 1: How to Define the Goal for Your ECommerce and B2C Lead Nurturing Campaign

The primary goal for any business is to maximize profits. The best way to accomplish this goal is to not only increase your number of customers, but increase the lifetime value (LTV) of those customers.

Your lead nurturing campaign can contribute to the larger goal of increasing LTV by accomplishing one of the following specific goals:

1. Move **Potential Customers** to **First-Time Buyers**
2. Move **First-Time Buyers** to **Repeat Customers**
3. Keep **Repeat Customers** active (i.e., turn **Repeat Customers** into **Active Repeat Customers**)
4. Move **At-Risk Customers** back to **Repeat Customers**
5. Win-back **Idle Customers**

Step 2: How to Determine Your ECommerce and B2C Target Audience

As seen, there are many ways to increase LTV. So when prioritizing which goal to pursue and which segment to target with your lead nurturing campaign, take into consideration two factors:

1. The total opportunity associated with that segment
2. How difficult or easy it may be to accomplish the goal for that segment (which is much more difficult to quantify, but should not be ignored)

To determine the opportunity associated with each segment, you want to quantify what you can gain if you meet each of the goals listed above. You can use a chart like the one below from Receiptful to estimate the size of the opportunity for each segment.

SEGMENT	# OF CUSTOMERS	LTV	GOAL	TOTAL OPPORTUNITY = (GOAL LTV – CURRENT LTV) X # OF CUSTOMERS
POTENTIAL	100	$0	Move to First Time	$5,000 = ($50 - $0) x 100
FIRST TIME	50	$50	Move to Repeat	$7,500 = ($200 - $50) x 50
ACTIVE REPEAT	50	$250	Keep Engaged	n/a
REPEAT	200	$250	Move to Active Repeat	$10,000 = ($250 - $200) x 200
AT RISK	50	$150	Move to Repeat	$2,500 = ($200 - $150) x 50
IDLE	150	$100	Move to Repeat	$15,000 = ($200 - $100) x 150

From our calculations in the example chart, it becomes immediately apparent that our largest opportunity is our Idle Customers.

Then you need to take into account the harder-to-quantify consideration, which is how easy or difficult it may be to accomplish your set-out goal for each particular segment. For instance, convincing idle customers to return and become repeat customers is likely a more resource-intensive project than simply engaging regular repeat customers and turning them into active repeat buyers.

Step 3: How to Choose the Right Lead Nurturing Campaign to Meet Your Goal.

Now that you have identified the biggest opportunity, it's time to choose the right campaign to meet your goal. This can be somewhat formulaic. The chart below outlines the types of campaigns recommended to achieve the five goals outlined earlier.

GOAL	CAMPAIGN
Move Potential Customers to First-Time Buyers	» Welcome » Abandoned cart
Move First-Time Buyers to Repeat	» Post-purchase » New customer
Move Repeat Customers to Active Repeat Customers	» Repeat customer » Post-purchase
Move At-Risk Customers back to Repeat	» Re-engagement
Win-back Idle Customers	» Win-back

Step 4: Create Content for Your Lead Nurturing Campaign

Now that you have selected the right campaign for the job, let's see what content should be included in each of these campaigns.

Abandoned Cart Campaign

Nearly 60-70% of online shopping carts are abandoned. Because most people tend to abandon carts due to price or readiness, discounts and consistent reminders have been proven to return leads to your site to complete their purchase.

$260 billion in sales each year are lost due to abandoned carts (Leverage Marketing).

Regardless of the reason, the goal of your abandoned cart campaign is to get these shoppers to come back and complete their purchase. All emails should include the following elements:

1. The abandoned item displayed as part of the message and subject line
2. Product image
3. A backlink URL directed to the abandoned-cart checkout

We recommend including the following three emails in your abandoned cart campaign:

Email 1: Cart Reminder

The first email in the campaign, sent one hour after abandon, should be a simple reminder to the customer that they left something in their cart. The message should have more of a customer-service oriented tone and can also include a modest discount.

Email 2: Cart Incentive

The second email is sent one day after abandon. You should present an offer (e.g., discount code or free shipping), but ensure it is slightly better promotional offer than email 1 if you did offer a promotion. Create urgency by giving them a short timeline to use the promotional discount—three days at the most. This email will encourage those buyers who were stuck on price or thinking about buying from a competitor to complete their purchase.

Email 3: Cart/Incentive Expiration

The third email in this series, sent 3 days after abandon, can be considered optional but should be included if you didn't offer a discount in email 1 or prospects aren't converting from either the first two emails. The messaging can be around the cart and/or incentive expiring, or you can provide an even more aggressive discount. For example you could include a phrase like, *"Items in your cart are selling fast. Make sure to complete your purchase before your favorites are gone"* or *"Your discount code expires in 24 hours".*

As a side note, not all companies are comfortable giving discounts or have incredibly low profit margins. That's okay, this campaign can still work for you by recapturing those leads who simply forgot, weren't quite ready, or had check-out issues.

Welcome Campaign

A welcome campaign is aimed at turning potential customers who have subscribed to your mailing list into first-time buyers. And B2C buyers have come to expect welcome emails in their inboxes upon subscribing to a new mailing list.

While engagement opportunities abound, be careful bombarding potential customers with aggressive sells at this stage. Your welcome email is first and foremost intended to confirm that the recipient opted in to receiving emails. You are also establishing your brand's distinct personality so it is identifiable in the future. This will make potential customers less hesitant to purchase products from a new source, as they'll feel they actually know who you are as a company. Needless to say, consistency in brand and tone are key for these emails.

A welcome campaign can truly be customized to fit your brand, but we suggest that all include the following:

Email 1: Welcome Introduction Email

Configure your first email so that the very second a new subscriber joins your list, it's sent to them with the coupon code prominently displayed. The offer can also incorporate a deadline to drive urgency for the purchase. Include a brief thank you or welcome note at the end and leave it at that.

Email 2: Incentive Reminder

This email serves as a reminder to redeem the incentive you offered in the first welcome email. This helps convert subscribers who may have missed your first message, or who are waiting until the last minute. Using urgency and scarcity in this message is also highly recommended to drive the conversion.

In addition to the two core ones mentioned above, you can include emails featuring:

Brand Story/Introduction Email

This email can provide background on your company, share your brand story, communicate your unique value proposition, and officially welcome the subscriber to your brand family.

Social Proof Email

If a subscriber hasn't made a purchase after receiving the first two emails, they likely still need some convincing that your products are as great as you claim. And the best person to convince them of this is an existing customer. Use this email to showcase some of your best reviews, but don't just focus on mere star rating. Try to showcase testimonials that highlight how your product has helped solve a particular problem or proved itself superior to a competitor. Testimonials are also more powerful if the reviewer posted a photo with their review, which you should include in the email.

Product Benefits Email

Use this email to highlight and describe some of your best-selling products. Include high-quality photography, clear CTAs, and remind your subscribers that they can use the incentive you offered previously to make a purchase of these products. Let subscribers know what makes your products different, and if you have a warranty or no-questions-asked return policy, mention it. Perceived risk is one of the key factors that prevents people from buying from unknown brands, so by addressing it head-on you may be able to overcome this common obstacle to purchasing.

Incentive Expiration

Send this email as a last ditch effort if your potential subscriber remains steadfastly unmoved by your offer. Let them know that their discount will expire in just a few hours, and their opportunity to save on that fantastic product will be gone for good. While you are emphasizing that the discount is going to expire, don't lose sight of the fact that at the end of the day you're selling a product, not your discount. Remind them about what is so great about your product and your brand.

Post-Purchase Series (Order and Shipping Confirmation)

The post-purchase series while very basic, is critical. That's because customers are expecting to receive these emails, and will be on the lookout for them to arrive in their inbox. While your larger batch emails tend to have an average open rate around 20%, post-purchase transactional email open rates average north of 50%. But, nearly all retailers send the same basic post-purchase emails (order confirmation & shipping confirmation). This is a hugely missed opportunity.

The immediate period right after purchase is a golden time to capture a repurchase when customers are feeling the “warm & fuzzy” buzz right after purchase. So we suggest including the following in your order confirmation and shipping confirmation emails:

1. A discount to shop again.
2. Highlight of any shipping-specific value-points, such as always free shipping, seamless returns, etc.
3. Product recommendations personalized to the customer and their purchase history.
4. Product specific educational information or resources to help your customer get the most out of their purchase.

New Customer Campaign

In addition to the post-purchase emails sent to new customers, a separate New Customer Welcome campaign is key in turning a one-time purchaser into a loyal customer. By showing them what your store, product, and brand are about, rather than going into a hard sell, you cultivate a pattern of engagement.

The pressure is high with your welcome emails, as they determine the likelihood or frequency that recipients will open your subsequent emails, so it’s important to get it right.

In terms of content, possible things to include:

- Your brand’s origin story
- Your social media accounts to engage and follow
- Customer loyalty programs they can enroll in
- An incentive on their next order
- An invitation to modify their customer profile or preferences
- Helpful product or lifestyle-related resources
- Product review request

We suggest including 4 to 6 emails in this campaign. An example campaign could look like the following:

Email 1: Confirmation Email

Sent one day after purchase.

Make this email short and sweet by confirming that their customer account has been successfully opened and providing some ways to get in touch. You could also invite the recipient to engage with your brand on social media.

Email 2: Brand Story

Sent one week after purchase.

Your first email was to the point with a quick introduction. In your second email, you can take some time to provide background on your company, highlight your unique value proposition, and officially welcome new customers to your family or whatever affectionate term you use to describe your group of customers.

You really want to develop a distinct personality for your brand that will be readily identifiable to your customers as you are establishing the specific tone you'll be using in all future communications.

Email 3: Helpful Product or Lifestyle-related Resources

Sent two weeks after purchase.

In this email you are establishing yourself as not just a seller, but a trusted advisor and source of information. You can include links to educational content like blog posts and instructional videos to help them get the best use out of your products, as well as industry news articles and resources to keep them up to date on the latest industry developments. Establishing yourself as a trusted source makes it much more likely that they will take your product recommendations seriously in the future.

Email 4: Product Review Request

Sent three weeks after purchase, or at least three days after product delivery.

A post-purchase email requesting a product review from your recent customers is a great way to to tell them you care what they think, as well as get more product reviews for your site.

Time your product review email to arrive a few days after you are sure they've received their product shipment so they have had time to actually use it. Your email should focus primarily on asking them to complete a review, and offer a small thank you for doing so in the form of a discount or exclusive offer.

Email 5: Up/Cross-sell

Sent one month after purchase.

Now that you have established a strong pattern of engagement with your new customer, you can take the opportunity to sell complementary or upgraded products. Of course, the more personalized and accurate the product selection (many email platforms have dynamic product recommendations built-in), the better chance you'll have to make another sale.

Repeat Customer Campaign

Repeat customers are a high-value segment of the customer base and more likely to become brand/product advocates and help recruit friends to purchase from us. So, we want to treat them a bit differently than first-time customers by making them feel like VIPs.

Like your welcome campaign, this campaign can be personalized to your brand and can include any combination of the following emails:

Thank You Email

This is the one must-have on this list. You are thanking them not just for a single purchase, but for being a loyal customer. Use messaging that is very warm and makes them feel particularly special.

Referral/Loyalty/VIP Program Email

If your store has a referral or loyalty program, this is a good opportunity to introduce it to your repeat customers. They are more likely than the average customer on your list to enroll in the program. Your program can include access to exclusive discounts, content, events, or the ability to earn points towards these items.

Replenishment/Reorder Email

For products that are replaceable or consumable, you want to remind the customer several days before the product needs to be replaced, so they have ample time to repurchase. This can be done through measuring out the average time your customers take to reorder this certain product. If it's already time for them to replace their product by the time your reminder arrives, your replenishment email will be too late. If needed, you can follow up this first email with another reminder that offers an incentive.

Birthday/Anniversary Email

Use your customer's birthday as a chance to celebrate them. You can trigger this email days before your customers' birthdays with personalized messaging and perhaps a discount. You could do the same to celebrate their anniversary as a customer with you.

Exclusive Access Email

Make loyal customers feel like they are part of an elite group by offering them exclusive content, invites to VIP events, early access to new products, or special promotions.

Re-Engagement Campaign

The goal of your re-engagement campaign is to "reactivate" at-risk customers. These are not yet considered inactive customers so this is your opportunity to get back on your customer's radar, share updates about positive changes to your product or business, incentivize them to make another purchase with a coupon, or ask them why they have not purchased from you in a while.

As a note, you may be on thin ice with these customers, so you want to spread out the email frequency a bit more for this campaign.

Inactive subscribers were 26% more likely than non-subscribers to make another purchase (Mailchimp).

We suggest sending a series of three emails according to the following schedule:

- **Email 1** - Send as soon as a customer is deemed at-risk. For products that are replaceable or consumable, send a replenishment email. Otherwise, send an up/cross-sell email that presents related products personalized for the customer. Be sure to make reference to previous purchases or engagements so it doesn't feel like your message is coming out of the blue.

- **Email 2** - Sent 1 month later, this email is less salesy. It should include information about your brand or products (e.g., "check out our charity," "see how customers use this product") or any other content that can help your buyer overcome any objections they may have to purchasing your recommended products. If you are open to it, you can also include a modest discount.
- **Email 3** - Sent 2 months after deemed at-risk, presents a heavy promotional offer that is personalized to the recipient. If your customer fails to interact with this email, or your other marketing activities such as your website, SMS, or social, they will be considered idle.

Win-back Campaign

Your win-back campaign is a last ditch effort to reactivate idle customers. Essentially, you are checking to see if they still have a pulse and are worth keeping on your mailing list.

We suggest sending a series of four emails according to the following schedule:

Email 1: We've Missed You

Sent as soon as customer is deemed idle.

This is the first touch-point in the series and acts as a soft push for them to re-engage by offering a small incentive. The messaging is based around a simple check-in email stating that you have not heard from them in a while. The copy can be witty or straightforward depending on the brand voice. The subject line should be very enticing but describing the incentive being offered to heighten the chance of the open.

Email 2: Personalized Discount

Sent one week later.

In the second email you need to sweeten the deal with a stronger, personalized incentive to get the customer to engage. Keep in mind that you should refer to any previous purchases or engagements that the customer has made with your brand, and all offers should be personalized, including offer type and product recommendations. Use customer data to determine the types of offers this customer interacted with most to determine the best type of offer to present.

Email 3: Incentive Expiration Email

Sent 2-3 weeks later.

This is your last ditch effort to re-engage your customer. You need to create a sense of urgency by highlighting that their incentive will be expiring shortly (within 24 hours at most). Again, include personalized product recommendations for them to use their incentive on.

Email 4: Unsubscription Notice

Email 4 sent 1 month later.

If customers do not interact with email 3, or any other marketing activities, then it may be time to delete them from your mailing list. So, this last email asks them to either confirm subscription or to unsubscribe. Most dormant contacts will still be non-responsive, but anyone you get to click confirm or to open the email will be reactivated. Those who don't should be deleted from your list.

Step 5: Tie Your Campaign Together with ECommerce and B2C Marketing Automation Software

Now that you've segmented your list, decided which segment to target, and created the email content for your chosen campaign, it's time to tie it together with an automated workflow.

For each workflow you need to determine the following:

1. **What will the timing of emails be?** The spacing of your email sends will depend heavily on the type of campaign you are running and the segment you are targeting.
2. **What is the enrollment criteria workflow?** Is it an action taken by a customer, such as subscribing to your email list or completing their first purchase, or inaction, such as failing to interact with your last 10 emails or not making a purchase in a given time

period. On the other hand, a contact could be enrolled when they are added to a particular list or change lifecycle stages.

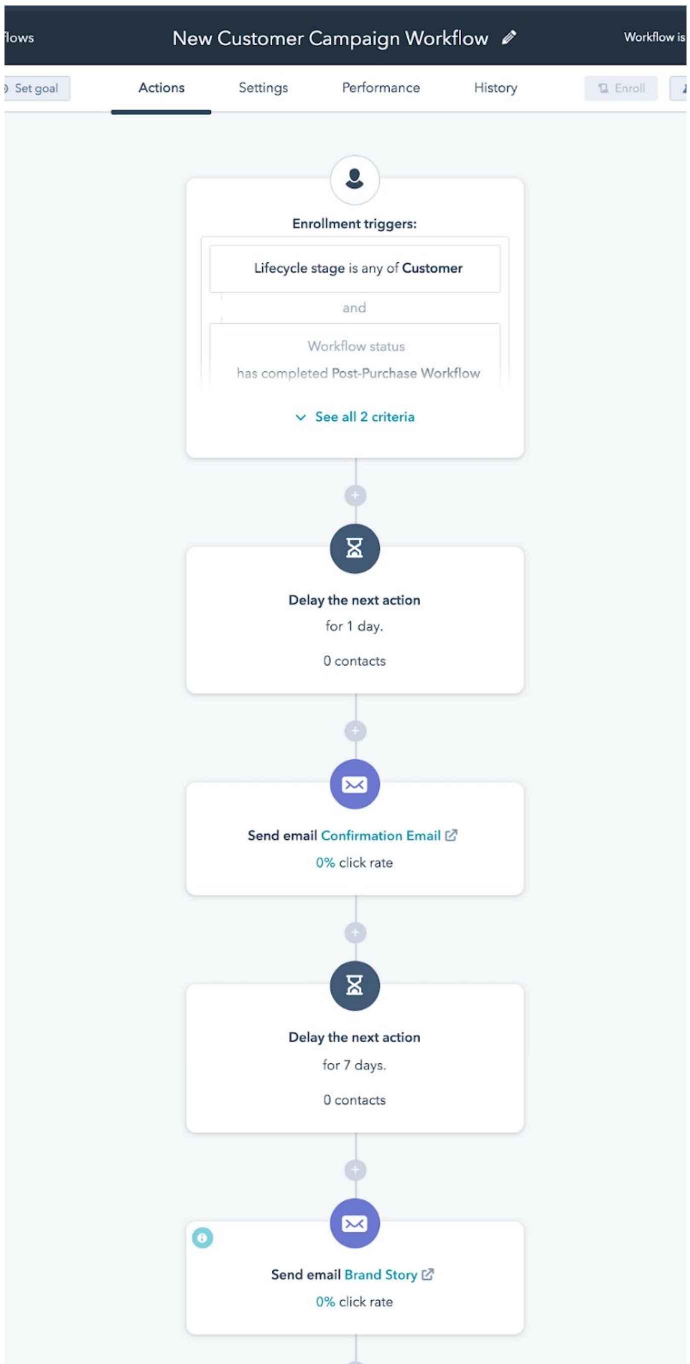
3. **What is the goal of the workflow?** The goal varies based on the campaign ranging from engaging with an email, making a purchase, or simply completing the workflow. For campaigns such as a re-engagement and a win-back, your goal determines when a customer will be removed from a workflow (e.g., no longer receive the emails in the series). For other campaigns, such as the repeat-customer and welcome series, you may wish for customers to receive all the emails in the series regardless of any actions they may take.
4. **How complex do you want your workflow to be?** Your workflow can be set up linearly, where customers progress through it in straight-lines, or they can have different branches (or paths) based on customers' responses to each email (e.g., unopened email versus a purchase made). It all depends on how simple or complicated you want to make it.
5. **Do you have any exclusion criteria?** For example, to avoid over-emailing, it is a good idea to ensure customers are only enrolled in one campaign at a time. So you may want to set exclusion criteria to ensure contacts already active in another campaign are not enrolled. Also, many campaigns are only meant to be received once, such as the Welcome and New Customer Campaign, so you want to prevent the re-enrollment of any contacts to these workflows.

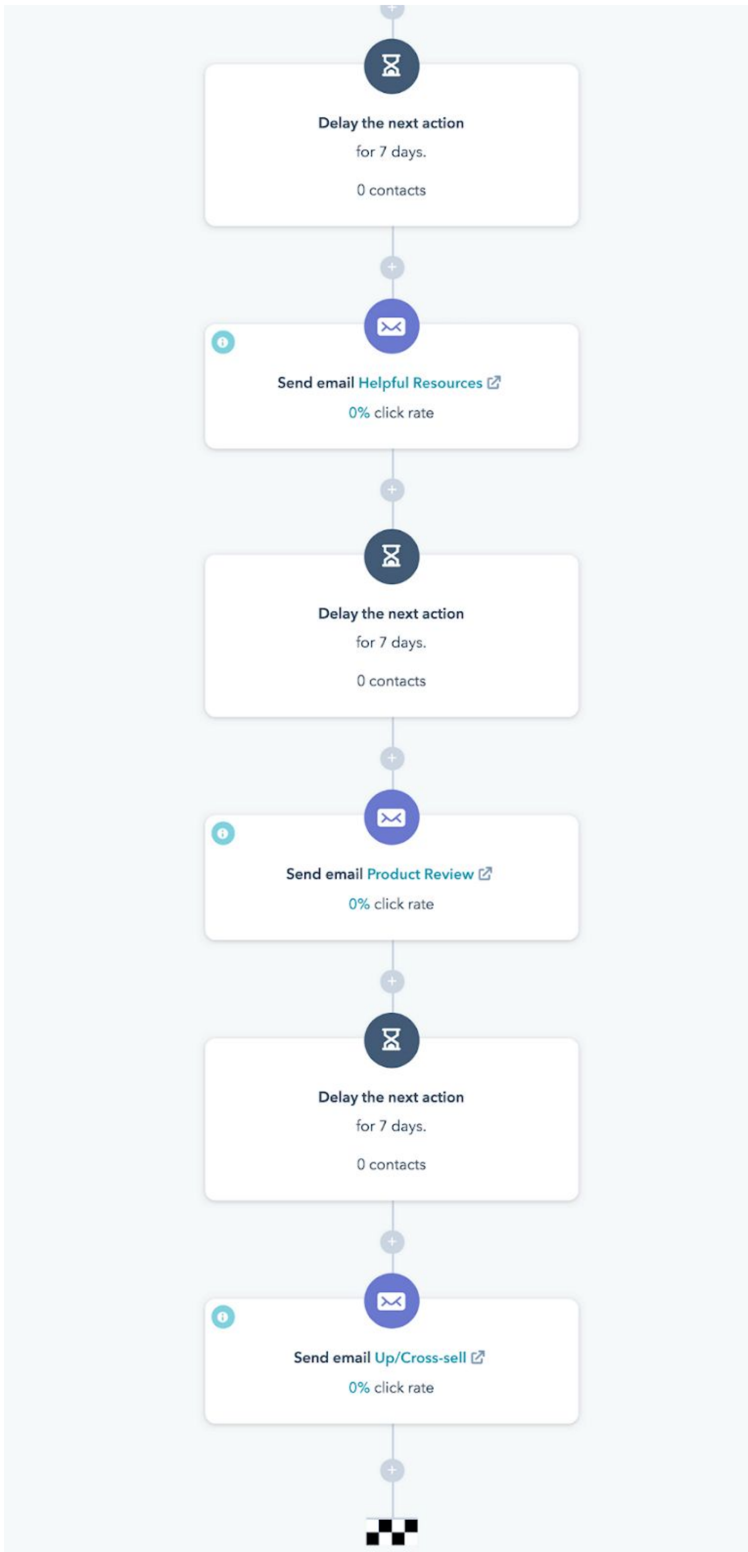
With this information in hand, it's time to build your workflow. To help you visualize how to do this, let's create the workflow for one of the campaigns outlined earlier: the New Customer Campaign.

How to Create the Workflow for a New Customer Campaign

1. Set enrollment criteria as anyone who has completed a purchase (or has become a customer) and completed the Post-Purchase (Order and Shipping Confirmation) workflow.
2. Exclude any customers who have already completed this workflow (this will ensure only first-time purchasers are included).

3. In this campaign you want everyone to receive all emails, so there is no need to set a goal that would remove someone from the workflow once it starts.
4. Build the workflow to include all of the emails in the series with your chosen delays between sends. Your final product will look something like this:




Delay the next action
for 7 days.
0 contacts
Send email Helpful Resources
0% click rate
Delay the next action
for 7 days.
0 contacts
Send email Product Review
0% click rate
Delay the next action
for 7 days.
0 contacts
Send email Up/Cross-sell
0% click rate

Continued Nurturing: The Role of a Promotional Calendar

You may have noticed that once a contact has completed one of your campaigns, unless they change lifecycle stages, they will fail to receive continued nurturing from you. That's why it is important to supplement your lead nurturing campaigns with promotional emails. That way, any contacts not currently enrolled in one of your campaigns continues to be nurtured.

A promotional calendar is one of the simplest ways to set yourself up for success. It will help you identify key sales dates and holidays, shoppers buying patterns, and seasonal trends so you can plan effective promotions ahead of time.

The Beginning of the Year

The beginning of the year can be a slow time for certain retailers and industries. However, one of the most overlooked opportunities is using clearance sales, bundling, and other tactics to move old and slow moving products.

Wedding Season

This shopping period usually falls between May and July. Shoppers are actively looking for wedding gifts, clothing, accessories, and travel accommodations. You can capitalize on this season by helping shoppers through their buying process with helpful content, capitalizing on proactive shoppers with early summer sales, and by offering added benefits like gift wrapping and customization.

Summer Sales Slump

July is the slowest month for eCommerce. You want your summer shoppers completing purchases in April, May, and June. This is when your items hold the most value and demand is highest. To plan ahead promote summer products as early as February and March to create demand and incorporate important summer dates like the Fourth of July in your promotional planning.

Back to School Sales

40% of back to school (B2S) sales occur in August, but over 50% occur before August, as early as April. To capitalize on both planners and procrastinators, plan both late Spring and early summer B2S promotions. Of course, know who your shoppers are—parents, children, college students, teachers—and what they are looking to buy during this period.

Holiday Sales

Much of the focus on holiday sales goes to Black Friday and Cyber Monday. However, the competition is extremely high then, so you want to look for other less obvious holiday sales opportunities that make sense for your business.

A solid promotional calendar serves as the right hand man to your lead nurturing campaigns, by helping you plan for the slower and busiest, most lucrative times of the year.

Feel like you have a better understanding of lead nurturing campaigns for eCommerce and B2C companies? Take your learning to the next level by applying your knowledge in the *Lesson 8 Exercise* below.

Lesson 8 Exercise

Determine Which Goal & Segment You Should Prioritize

Complete the chart below by calculating the opportunity associated with each segment of your database. This will help you prioritize which goal and segment to focus on for your lead nurturing campaign.

SEGMENT	# OF CUSTOMERS	LTV	GOAL	TOTAL OPPORTUNITY = (GOAL LTV – CURRENT LTV) X # OF CUSTOMERS
POTENTIAL			Move to First Time	
FIRST TIME			Move to Repeat	
ACTIVE REPEAT			Keep Engaged	
REPEAT			Move to Active Repeat	
AT RISK			Move to Repeat	
IDLE			Move to Repeat	

Next up in *Lesson 9* of the Lead Nurturing Masterclass, we'll cover in detail how to test and optimize your lead nurturing campaign.

LESSON 9: TESTING AND OPTIMIZING YOUR LEAD NURTURING CAMPAIGN

Welcome back to our Lead Nurturing Masterclass. This lesson will focus on how to optimize your campaign after it is launched because a lead nurturing campaign should never be considered finished. Quite the contrary actually—a campaign should be in a constant optimization process that ensures it does not fall victim to viewer fatigue, changing industry trends, and shifts in your target personas. So if you want the best results, testing and tweaking your lead nurturing campaign post-launch is critical.

In this lesson:

1. Digging for Data: Backbone of the Optimization Process
2. What to Optimize and Test in Your Lead Nurturing Campaign
3. How to Test Your Lead Nurturing Campaign

1. Digging for Data: Backbone of the Optimization Process

An actionable optimization strategy starts with cold, hard data. But what kind of data is available, and how can it be systematically and efficiently collected? We begin with a distinction between two main varieties: quantitative and qualitative.

What is Quantitative Data?

Quantitative data, simply put, is characterized by structured, often numerical criteria that can be analyzed with statistical methods. This type of data focuses on the "what", "when", and "how" of the customer and lead behavior and is often collected through research methods like surveys and experiments, to which a set of procedures can be applied systematically.

Two main types of quantitative variables are continuous and discrete. Continuous variables can take any value (including decimals) over a range, and are measured in units like hours and seconds, fractions of a dollar, or percentage rates. On the other hand, discrete variables are generally counts of things that can only take a whole value like referrals, site views, new customers, or rating scales in surveys.

Some examples of potential insights provided by quantitative research include:

- Where website visitors enter and exit your site
- How long visitors tend to spend on particular pages
- Which pages are most popular
- How page performance has been increasing or decreasing over time
- Email marketing rates (click-throughs, unsubscribes, etc.)

How to Collect Quantitative Data

KPI Analytics

KPIs, or key performance indicators, tend to be best suited for quantitative data research. They are, in a sense, the most straightforward way to collect this type of data, as they can be tracked and statistically analyzed directly—with the help of the right software of course. They are also more directly relevant than other methods to testing for lead nurturing, as they essentially provide variables for the tests.

A large variety of tools are at marketers' disposal for data collection and compilation, suited to every budget and company type. From Google Analytics to Crazy Egg to KissMetrics, the range of features and options available can be overwhelming, so time should be taken to make a well-researched decision about the option that fits your company best.

Heat Maps and Click Analysis

Heat maps are visual representations of data that provide information on how site visitors interact with specific pages and elements on your website or emails. A color or monochrome gradient is used to distinguish areas of higher activity. Examples of variations on heat maps include hover maps, scroll maps, mouse movement maps, attention maps, and more.

Click maps, similarly, demonstrate which page elements are attracting the most attention and are actually being clicked on, such as CTA buttons, links, and interactive features. Outside of analytics that track metrics like click-through rates, supplemental click analysis can help to identify which site elements are being visually perceived by viewers as clickable or click-worthy.

Surveys

A survey can come in the form of a single question or a series of questions. They can be embedded as a pop-up directly on the page for your website, or as a full survey sent out via email. In the case of quantitative data, it is important to create surveys with the right type of variables in mind, most often discrete. The nature of the questions in the survey, and the answer choices available, should reflect this.

Consider examples such as:

- **Radio buttons** - Respondents select one option from a list of possible choices
- **Checkboxes** - Allows respondents to choose multiple options from a list
- **Slider scales** - Responses range either numerically or categorically (e.g., “extremely unlikely” to “extremely likely”)
- **Net promoter scores (NPS)** - This is an index ranging from -100 to 100 that measures a customer’s willingness to recommend a company to others
- **Star rankings** - Ranking is indicated by stars (usually 1-5) with the highest number of stars ranking for the highest quality

What is Qualitative Data?

Qualitative data is more unstructured information that is intended to be analyzed subjectively. Unlike quantitative research, qualitative research is exploratory and focuses on the “why”, aiming to gain insight about a particular topic. It can also help answer questions about the results of quantitative research, providing explanations and illustrations that bring clarity and direction to your next business move.

This data is commonly collected through focus groups, surveys, and observation. (Note that surveys can be applied to both quantitative and qualitative data, depending on the questions asked and how the results are analyzed).

Two of the most popular methods for gathering qualitative data are interviews, which allow for direct communication with customers about where optimization strategy may be lacking, and customer surveys, which gather feedback on a larger scale. Examples of insights which qualitative data can provide include:

- What kind of problems leads are facing
- What their motivations and goals are

- What kind of experience visitors have on your company site
- Where customers' pain points have been, both in outside experiences and with your company

How to Collect Qualitative Data

Open-Ended Surveys

Open-ended surveys involve asking open-ended questions, which means minimizing multiple-choice options and instead requesting descriptive, essay format responses. As the goals for qualitative surveys are broader, and the results more ambiguous in terms of interpretation, it can seem difficult to determine what type of questions to include.

Fortunately, there are several universally applicable key topics to cover, in addition to more specific questions that may be relevant to your company's industry, products, or services. These include:

- The customer's intentions
- The user experience process and the behaviors in which customers participated throughout the nurturing and buying process
- Points of friction experienced
- The identities of the customers

In-Person Interviews

Interviews are one of the most flexible ways to gather data, while additionally gaining trust and strengthening a relationship with the respondents. By making the process more "human", it may be easier to receive more authentic and insightful responses. In addition, in-person conversations can yield information indirectly through the interviewees' tone of voice and body language.

It's also possible to put an existing feedback system—customer help chats and phone conversations—to use. If your software keeps accessible logs of these, they can prove to be a small goldmine of insight into common complaints, usability of site features, areas of highest satisfaction, and more.

Reviews and Secondary Feedback Sources

Last but not least, another example of the potential of recycled content in data collection is the use of existing customer reviews and secondary channels that allow for client feedback. These include blog pages, social media platforms, and forums. Reviews can offer insights not only into customers' experience with your products, but with the company itself.

If you have been observing a consistently low turnout of comments and reviews, consider incentivizing customers with something like a rewards point scheme, or at least simplifying the response process. While it will not always fit neatly into your objectives for the kind of data you consider most valuable to collect, customer feedback will send the message loud and clear about the best and worst components of their experiences with the company.

When to Use Each Type of Data

Understanding how and when to apply the two types of data is a major step in developing smart data collection within an optimization strategy. Quantitative data is most useful for identifying concrete facts and figures, such as the pages on your site with the highest bounce rates or emails with the lowest open rates.

When it comes to specific site elements or a simple set of variations, such as the kind that would be used in an A/B test, quantitative results are the way to go. Anything that can be analyzed with analytical software effectively should be classified as quantitative data, as well. Quantitative data helps you decide what needs to be optimized in your lead nurturing campaign.

Qualitative data, on the other hand, provides the greatest advantage in determining the motivation behind prospects' behavior. It adds a crucial psychological component—feedback sources, like surveys and polls, prove their worth in providing a glimpse into respondents' minds. Qualitative data provides insight into how to improve the aspects of your campaigns that need to be optimized.

Now that you know where to find your data, it's time to use it to determine what to test and optimize in your lead nurturing campaign.

2. What to Optimize and Test in Your Lead Nurturing Campaign

To evaluate the areas in which a lead nurturing campaign can be optimized, let's review the key components of lead nurturing:

- Lead scores and segments
- Email marketing campaigns
- Landing pages and CTAs
- Nurturing content pieces
- Social media and other channels of outreach
- Workflows

Each of these components has specific metrics that can be analyzed to assess its performance and, likewise, be the focus of our optimization efforts. But how can we figure out which parts need optimization? The first step is to compare your observed metric to an established benchmark. Sources for benchmarks include:

1. Historical performance (best option)
2. Industry benchmarks
3. Campaign goals

Once we have decided what we are comparing our rates to, we want to know the metric we observed is significantly better (or worse) than those benchmarks. Now how do we do that? Enter the chi-square goodness of fit test.

Once you have found your poor performers you will need to prioritize your optimization activities because you can't fix everything at once. We suggest applying a prioritization model, such as ICE (Impact, Confidence, Ease) or PIE (Potential, Importance, Ease), to your list to identify the highest potential improvements first.

It can be helpful to begin by outlining a few key metrics by which to measure your lead nurturing as a whole. From here, you can move into determining more specific metrics for the pieces listed above.

Top Lead Nurturing Metrics

Click-Through Rate

This measures the proportion of the audience who click on one or more links contained in a message, on a page, etc. Click-through rates help businesses better understand the relevance and engagement of their content. Low rates can indicate problems in your ability to align content and offers with customers' needs.

Time to Customer Conversion/Sales Cycle Time

The length of time it should take for a lead to become a customer can be a difficult measure to determine, though it is possible to navigate with the help of industry-specific averages. The main goal of the company, regardless, should be to continuously shorten the sales cycle while being cognizant of realistic constraints—for example how B2B companies inevitably tend toward longer cycles than B2C.

Customer Lifetime Value

Customer lifetime value (LTV) measures how much a client is worth to a company, and also determines the current value of the customer relationship as well as its growth potential over time. Taking both cost of procurement and return on investment into account can be useful when trying to decide how much to budget for acquiring new customers. A negative LTV can indicate an inefficient acquisition approach, or misguided investment in the wrong lead segments.

Conversion Rate

This is perhaps the most important staple metric of lead nurturing optimization. Conversion is the process through which prospects are converted to leads, and/or leads are converted to customers.

Thus, your conversion rate is the percentage of recipients who complete a desired action, designated as an indicator of their progress into the next phase. This could be a form submission, CTA click, or email open. To be more specific, "convertees" can be broken down into three categories: Leads, Marketing Qualified Leads, and Sales Qualified Leads.

Leads demonstrate some interest in your content, particularly top of the funnel offers, and may fill out a form requesting their personal information. Marketing qualified leads (MQLs), meanwhile, engage more actively, taking interest in middle and perhaps even bottom of the funnel offers.

Finally, sales qualified leads (SQLs) have thoroughly interacted with your company and its offers and content. They are all but ready for a sales pitch! Lead nurturing focuses on the span of the conversion cycle, tracing the progress of leads to MQLs to SQLs.

In B2C marketing, conversions can be relatively fast and simple, as they are connected to more instantaneous actions. In the B2B sales cycle, on the other hand, the conversion process requires longer investment and is more complex, based on a series of smaller conversions. Your conversion strategy will, of course, need to be optimized to best fit your company's needs.

The answer to what constitutes a "good" lead conversion rate is rather complex and subjective. Average rates vary between B2B and B2C, industries, individual companies, and more—numbers cited by marketing sources range from 2% to 10%. Industry-specific reports can be good resources for establishing ballpark benchmarks, but remember that consistent growth often matters more than surpassing a specific number.

Now, let's dive into some specific lead nurturing elements including the most common metrics associated with each, ways to improve those metrics, and aspects to test.

Testing and Optimizing Emails

In *Lesson 5*, we covered lead nurturing emails in detail, including testing strategies and the major goals you should be pursuing as you improve your campaigns. Here is a brief overview (or return to *Lesson 5* for a more in-depth reference).

Email Metrics

- **Delivery Rate** = (Delivered / Sends) x 100
- **% Contacts Lost** = (Contacts Lost / Sends) x 100
- **% Hard Bounces** = (Hard Bounces / Sends) x 100
- **% Marked as Spam** = (Marked you as Spam / Delivered) x 100
- **% Unsubscribes** = (Unsubscribes / Delivered) x 100
- **Open Rate** = (Opens / Delivered) x 100
- **Click-through Rate** = (Unique Clicks / Delivered) x 100

- **Click to Open Rate** = (Unique Clicks / Opens) x 100
- **Clicks to Conversion Rate** = (Leads Generated / Clicks) x 100

How to Improve Email Metrics

Email Deliverability

Signs that you are experiencing issues with email deliverability include a high number of bounced emails and/or a high number of emails being marked as spam.

Ways to improve bounce rate include:

1. Frequent list updates
2. Removing hard bounced email contacts
3. Sending emails from your own domain
4. Ensuring a new contact's email address was typed correctly in your database

Ways to improve spam rates:

1. Reducing the number of emails you are sending
2. Sending emails from your own domain for legitimacy
3. Avoiding spammy subject lines
4. Including straightforward unsubscribe options in all emails

Email Open Rates

If your open rates are performing significantly worse than your benchmarks, here are some ways to improve open rates:

1. Utilize email subject lines that are short, actionable, relevant, and pique a user's curiosity.
2. Send your emails from a person (e.g. tammy@campaigncreators.com instead of info@campaigncreators.com). Emails that come from a human often have a higher open rate.
3. Write persuasive "preview text" in order to give the recipient email context and improve open rate.

4. Use personalization (first name, company location, etc.) in your subject lines to connect with your recipients and increase authenticity.

The most useful and critical method to increase open rates is by constantly “Testing, Testing, Testing”. That’s because what works for another audience may or may not work for yours. Examples of useful tests to run to raise open rates include:

1. **Sender Tests** - Sending emails from a brand name or an email address with company info in its name, from different representatives’ accounts, or from different email addresses (e.g., info@ vs. offers@ vs. tammy@).
2. **Subject Line** - Length, word choice, content, offer type and placement, etc.
3. **Preview Text** - Editing for length and content offers another opportunity to optimize the open rate of your emails.
4. **Personalization** - Placing a first name or even a company name in the subject line, preview text, or greeting of your email.
5. **Time and Day** - Determining optimal time and day of the week to send your email to a particular database.
6. **Segmentation** - Exploring numerous ways to create unique segments in your database.
7. **Suppressions** - Suppressing the segment of unengaged subscribers from the majority of email sends.

Email Click-Through Rates

If your click-through, click to open, and/or clicks to conversion rate is underperforming, here are some tips for improving these metrics:

1. Include a signature from a real person as well as their contact information with your email. This will improve trust, click-through rate, and email engagement.
2. Include bullet points, bolded text, and white-space to improve email skim-ability and the reader’s understanding of the email’s core message.
3. Include an image of your offer to give the reader a tangible connection to whatever it is you are trying to promote.

4. Include alt text with your images to ensure that recipients who have switched off images in their email provider still understand what value they provide and are encouraged to click.
5. Ensure each email has a single objective to improve clarity, decrease cognitive load, and increase click-through rate.
6. Include various CTA styles in your emails. Use a healthy mix of buttons, images, hyperlinks, and contextual links that lead to the same landing page.
7. Leverage an email testing tool to see how emails render in different email platforms (e.g., Outlook, Gmail, Apple Mail, etc.).

Again the best way to determine what works best for your audience is to test it. There are several test variables associated with click-through rates including:

1. **Design** - Tweaking elements including header banner, columns, and high vs. stripped-down design (see *Lesson 5* for a standard example format).
2. **Text-to-Image Ratio** - Keep in mind the general rule that higher ratios of text to images tend to produce better-performing emails.
3. **Length** - Moderating the length of your emails and optimizing the design of those that are longer and guide readers short on attention or time.
4. **CTAs** - Type, color, placement, number on a page, etc.
5. **Social Sharing** - Deciding whether it is best to include social sharing links to engage your audience.

Testing and Optimizing Landing Pages

Landing pages are a primary way of delivering your offers or hook to leads, and are the way in which you collect a visitor's contact information—so optimizing their performance is time well spent.

Landing Page Metrics

- **Form submission rate** - Assesses the extent to which the main goal of a landing page (gathering a contact's information) is being reached.

- **Form submission by source** - Knowing where traffic is coming from—be it organic, paid, email, social, referral, or otherwise—and how it is converting is vital to analyzing your campaigns.
- **New contacts rate** - Every form submission does not guarantee a new contact in your database—contacts who have submitted a form prior are counted as existing contacts. This distinction can be important to accurate assessments.
- **Average page loading time** - Load time on a landing page, as well as any page on your site, will affect user experience and bounce rates.

Improving Landing Page Metrics

If your landing pages are not converting at an acceptable rate compared to benchmarks, here are a few tips for improving them:

1. Ensure your form is above the fold when viewed on ANY device. Landing pages should be mobile, tablet, and desktop friendly.
2. Be certain the number of required form fields are in line with the offer you are providing. For a top of the funnel offering, simply requesting an email should do.
3. If your landing page feels long, try including more than one form or CTA on the page. The user might forget about a form at the top after scrolling for a minute or two.
4. Add a short video for explaining complex offers. PRO TIP: Try using a turnstile (embedded form) halfway through your video to boost video conversion rate.
5. Create urgency by adding words on the page that will encourage your viewers to act sooner (on this visit) rather than later. Phrases such as "Limited Time Offer" or "Exclusive Deal" can achieve this.
6. Figure out what your desired landing page action is and reinforce it numerous times with your CTA and supporting copy.
7. Add visual and directional cues towards a part of your landing page, such as your form, that you would like to highlight. This will draw a visitor's eyes and make sure they complete your desired action.
8. To speed up your page make sure your images are scaled appropriately for the box they are placed in, you minimize your CSS files, enable browser caching, turn on

compression at the server level for your website, delete or deactivate any website plugins that are no longer in use, and reduce the number of redirects associated with your site. Redirects generate extra HTML requests and increase load time.

The best way to determine what works to convert your landing page visitors is to test it. There are several test variables associated with landing pages including:

1. Main headline
2. Main image (Size, placement, people vs. no people, icon vs. photo)
3. Button (Text, placement, design, size, color)
4. Form (Length, color, layout, placement)
5. Long copy vs. short copy
6. Header image/banner vs. none
7. Bullets lists vs. paragraph copy
8. Testimonials vs. none
9. Call to action

Testing and Optimizing for Social Media Platforms and Blogs

Social media metrics are fairly straightforward, and in some regards, easier to track than those of other campaign elements. These metrics include:

- **Post engagement rate** - The inflow of likes, shares, and comments on your posts.
- **Average post reach** - The number of unique people who saw your content. It affects every other metric you can track, such as engagement, likes, comments, clicks, and negative feedback.
- **Click-through rate** - Do users follow links back to your website, to particular offer pages, etc.?
- **Share rate** - Sharing posts increases awareness and builds your audience by word-of-mouth. Outside of other forms of engagement, it's worth paying particular attention to.
- **Clicks to conversion** - How many leads were generated compared to clicks on your post.

Improving Social Metrics

The best way to find out what your audience will respond to (and what the social algorithms will like) is to test:

1. Headlines and copy
2. Posting time
3. Posting frequency
4. Type (Image, link, text, video, audio)
5. Content (Question, opinion, news, stats, quote, poll, tip, etc.)
6. Calls to action
7. Hashtags

Improving Blog Metrics

Tips for improving the conversion rates of blogs include:

1. Using a mix of buttons and in-text hyperlinks.
2. Writing your blogs with your persona in mind first, and Google second.
3. Choose the right font—large and easy to read. This will keep your visitors from getting frustrated and leaving the page.
4. Make sure your blog is responsive to being viewed on mobile.
5. Only insert links to your campaign in blog posts that are relevant to that campaign.
6. Match the tone and style of your blog, CTA, and landing page language. This will provide consistency and boost conversion rates.

You can also try testing the following elements on your blog:

1. Headline
2. H2's (Sub-headings)
3. Font (Size, typeface, and color)
4. Images along with their frequency and placement
5. Call to action (Position, color, text)
6. Adding multimedia like audio or video

Testing and Optimizing Workflows

In a lead nurturing campaign, workflows are used to tie together the pieces of your campaign together in order to progress your lead from one stage of their journey to the next. The key metric associated with your workflows is the goal completion rate—the percentage of contacts enrolled in your workflow who met the designated goal.

To improve the performance of a lead nurturing workflow you can test:

1. Wait time between actions
2. Enrollment and suppression criteria (Who is included in the workflow)
3. Number of communication (Adding or subtracting)
4. Offer/content of communication
5. Form of communication (e.g., swapping an email for an SMS message)

3. How to Test Your Lead Nurturing Campaign

Now that we know what we want to optimize and test, it's time to actually do it!

A/B Testing for Lead Nurturing Campaigns

A/B testing is the cornerstone of lead nurturing optimization. Also known as split testing, A/B testing allows you to test variations of an element of a campaign alongside one another. The results will enable you to determine which version is the most effective option. Standard A/B testing begins with creating two versions of a piece of content, which are then randomly presented to similarly sized audiences.

The responsiveness and conversion rates of the test groups are recorded and analyzed with testing and/or analytics software, which often offers testing tools in tandem with tracking and analysis of metrics and KPIs.

But as our friend Peep Laja from CXL said, "Using an A/B testing tool does not make you an optimizer. Using a scalpel does not make you a surgeon."

The steps to follow for conducting successful A/B tests for optimizing your lead nurturing campaign are:

1. Formulate a hypothesis.
2. Create a ‘control’ and a ‘variation’.
3. Determine sample-size and test duration.
4. Go forth and test.
5. Evaluate the results.
6. Decide what do do with a ‘failed’ test.

Now, let’s break each step down in greater detail.

1. Formulate a Hypothesis

The key to finding success with A/B testing is by having solid hypotheses. A hypothesis is a prediction you create prior to running a test. It states clearly what is being changed, what you believe the outcome will be, and why you think that’s the case. Running the experiment will either prove or disprove your hypothesis.

A complete hypothesis has three parts—the variable, desired result, and rationale—which should be researched, drafted, and documented prior to building and setting an A/B test live. So a hypothesis is essentially a change and effect statement that often follows a simple established formula:

If [variable], then [result], because [rationale].

Let’s break these elements down a bit more.

The Variable

This is an element that can be modified, added, or taken away to produce a desired outcome. As with the scientific method, you want to isolate one "independent variable" (i.e., element) to test. If you want to test multiple aspects at once, you will need to deploy multivariate testing.

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The Result

The predicted outcome. Essentially you need to choose the "dependent variable" for your test and how you expect it to change. As discussed above, a number of conversion metrics can be relevant to every component in a campaign. Take time to find the indicators most relevant to the specific piece being tested. This could be more landing page conversions, clicks or taps on a button, email opens, or another KPI/metric you are trying to affect.

The Rationale

The last part of a hypothesis is the “why”. This demonstrates that you have informed your hypothesis with research. What do you know about your visitors from your qualitative and quantitative research that indicates your hypothesis is correct?

A thoroughly researched hypothesis doesn’t guarantee a winning test. What it does guarantee is a learning opportunity, no matter the outcome—winner, loser, or inconclusive experiment.

Another consideration is the desired statistical significance of your results. Setting your confidence level to a higher percentage is equivalent to investing in the accuracy of results.

2. Create a 'Control' and a 'Variation'

You now have your independent variable, your dependent variable, and your predicted outcome. Use this information to set up the unaltered version of whatever you're testing as your "control". If you're testing a web page, this is the unaltered web page as it exists already. If you're testing an email subject line, this would be the subject line copy you are already using.

From there, build your variation—the website, landing page, or email you’ll test against your control. For example, if you're wondering whether including an emoji in your subject line will increase open rates, set up your control email with no emojis in the subject. Then, create your variation email with an emoji in the subject line.

3. Determine Your Sample Size and Test Duration

Your sample size depends on three factors:

- **Baseline conversion rate** - Your control group's expected conversion rate.

- **Minimum detectable effect** - The minimum relative change in conversion rate you would like to be able to detect.
- **Statistical significance** - Threshold for significance based on your risk tolerance. For example, higher significance indicates greater certainty in your results but less power to detect a difference.

There are a number of sample size calculators available that will determine your needed sample size per variation needed based on these three factors.

For A/B testing emails, you just need to ensure that each variation is sent to the calculated sample size. For landing pages and website A/B testing, you'll translate sample size into the estimated time you need to run your test with two calculations.

Calculation #1: Sample size × 2 = Total # of visitors needed

Calculation #2: Total # visitors needed ÷ Average # of visitors per day = Test duration (in days)

4. Go Forth and Test

Though your variations should be tested simultaneously, there is nothing wrong with selecting testing times strategically. For instance, well-timed email campaigns will deliver results more quickly. Determining these times require some research of subscriber segments. As mentioned, depending on the nature of the piece, your site traffic, and the statistical significance that needs to be achieved, the test could take anywhere from a few hours to a few weeks.

If you are interested in gaining some additional insight into the reasoning behind your visitors' reactions, consider asking for qualitative feedback. Exit surveys and polls can quite easily be added to site pages for the duration of the testing period. This information can add value and efficiency to your results.

5. Evaluate the Results

Using your pre-established hypothesis and key metrics, it's time to interpret your findings. Keeping confidence levels in mind as well, it will be necessary to determine statistical significance with the help of your testing tool or another calculator. If one variation proves statistically better than the other, congratulations! You can now take action appropriately to optimize the campaign piece.

6. In Case of "Test Failure"

If your test failed to achieve a statistically significant result—that is, the test was inconclusive—several options are available.

For one, it can be reasonable to simply keep the original variation in place. You may also choose to reconsider your significance level or re-prioritize certain metrics. Finally, a more powerful or more dramatically different variation may be in order for your next test.

Most importantly, if your A/B test "failed", do not be afraid to try again. After all, the adage "practice makes perfect" fully applies to testing methods.

A/B vs. Multivariate Testing

Multivariate testing is founded on the same key principle as its A/B counterpart. The difference is in the higher number of variables being tested. The goal is to determine which particular combination of variations performs best, and examine the "convertibility" of each variation in the context of other variables rather than simply a standalone process. In many ways, it can be a more sophisticated practice.

This type of testing is a great way to examine more complex relationships between optimizable elements. In theory, it is possible to test hundreds of combinations out side-by-side! Notedly, multivariate tests have their disadvantages, particularly with regards to the greater amount of time and number of site visitors needed to conduct them effectively.

Testing for B2B vs. B2C Lead Nurturing

It is important to note that the significant differences between your B2B and B2C nurturing campaigns extend into optimization and testing. That being said, you will need to tailor your strategies accordingly to your sales cycle lengths and database sizes (as well as, of course, other factors relevant to your unique campaigns).

B2B

With longer sales cycles, B2B marketing often takes quite a while to collect enough data to gain insights into many optimization opportunities, and the smaller databases often lack sufficient data for more complicated testing, like multivariate testing.

However, it is fully possible to begin with more simple testing. This is why A/B testing is perfect for this type of campaign. Page layouts, email subject lines, and offer types can all be tailored to maximum effectiveness, given you put in the time to gather enough data to determine whether, and which, changes are making an impact.

B2C

B2C marketing's shorter sales cycles are conducive to fast-paced data collection to gain insights into many optimization opportunities. The flip side of this is that constant optimization is a virtual must to keep up with the (occasionally intimidating) pace of the market.

Larger customer databases also open the door for more complex testing and iterations. While there is still room for A/B testing in a B2C campaign, it is more efficient to incorporate multivariate testing into your approach.

Multivariate testing aims to determine which combination or interaction of variations produces the best possible results. For example, three variations of an image on a site page may be combined with two variations of a headline to create six versions of the content, which will be tested side by side.

As you can see, the launch of a lead nurturing campaign is only the beginning. If you want to experience success, you have to continually seek opportunities for improvement. As Tom Peters aptly pointed out, "Excellent firms don't believe in excellence—only in constant improvement and constant change."

Feel like you have a better understanding of testing and optimizing your lead nurturing campaigns? Take your learning to the next level by applying your knowledge in the *Lesson 9 Exercise* below.

Lesson 9 Exercise

Identify and Prioritize Optimization Opportunities

Select one element of your lead nurturing campaign to evaluate for optimization (e.g., an email, landing page, blog post, social post, or workflow). Under this lesson's section, *What to Optimize and Test in Your Lead Nurturing Campaign*, find the section dedicated to your chosen campaign element. Use this section to guide you through the following steps:

1. Gather the observed metrics listed for that element.
2. Determine your benchmarks for each metric.
3. Compare your observed metrics to your benchmarks.
4. If this element is underperforming, create a list of optimization activities or tests you could run to improve this struggling metric.
5. Prioritize your list using a prioritization model such as PIE or ICE.

Next up in *Lesson 10* of the Lead Nurturing Masterclass, we'll wrap things up with the best practices for a winning lead nurturing strategy.

Lesson 10: Lead Nurturing Best Practices

Welcome back to the Lead Nurturing Masterclass, and your very last lesson! We are concluding this masterclass with some final best practices and useful reminders to take with you as you build your lead nurturing strategy.

In this lesson:

1. Best Practices for Nurturing Emails
2. Lead Nurturing Optimization Best Practices
3. Best Practices for Lead Nurturing Content
4. Lead Interaction and Personalization Best Practices
5. Best Practices for Integrating Lead Nurturing into Your Overall Strategy

Best Practices for Nurturing Emails

Pacing Yourself

As important as regularity is to the success of your email nurturing campaign, it is wise to refrain from creating burnout for your recipients by over-emailing. This can be caused by enrolling a lead in too many campaigns simultaneously, or simply not spacing out sends sufficiently. Good workflows and thorough A/B testing can be key in preventing this.

Additionally, though email frequency should generally be timed to the average length of your sales cycle, keep in mind that the optimal timing for your strategy will depend on the type of campaign being implemented. Frequency can range from about once a week to once every month and a half!

For customer retention or re-engagement purposes, for example, you may choose to send additional emails to supplement your regular newsletter in particular cases, such as when relevant new offers or products become available, when customers interact with your company in a particular way, or when new strategies offer opportunities to drive conversions.

For nurturing leads who have made initial contact with your sales team, in contrast, it may be best to ask the sales team itself for advice, as your representatives are the ones in close contact with the recipients. Ultimately, pacing and variety of content are two potent factors that must work together for strong open and click-through rates.

Don’t Forget Your History with Your Leads

Tying in with consistency in tone and frequency is the crucial idea that you must remember the previous emails that a lead has received from your company. After all, nurturing is about establishing a relationship with leads. If a lead nurturing series acts as though every email is the first one being sent, with the same offers and phrasing, it can easily come off as uncoordinated and impersonal.

An email following up on an eBook offer, for instance, can discuss a brand message relevant to the previous email or reference it directly, creating a cohesive narrative around a product or service without simply repeating information. Combined with a detailed email calendar and intermittent emails that request questions or feedback from recipients, this practice will help to cultivate a dynamic that indicates to leads that you’re paying attention to them, rather than simply assigning various team members to robotically fill their inbox with emails.

Keep Multi-Channel Strategy in Mind

While email is a powerful cornerstone of a nurturing strategy, it is most effective when viewed as a pipeline or hub for connecting leads to other content on platforms such as social media and your site. As such, your emails must be coordinated with these platforms to enable an experience that allows leads to move seamlessly between channels. This is why a focus on multi-channel marketing is so important.

Multi-channel marketing is a straightforward term—a strategy in which marketers rely on a mix of channels to distribute content and engage with their audience, from a messaging app to an email campaign to a brick-and-mortar storefront. Effective multi-channel lead nurturing often involves email working alongside social media, dynamic website content, marketing automation, paid retargeting, and sales team outreach.

Despite the fact that 72% of consumers would rather connect with brands and businesses through multichannel marketing, only 14% of organizations say they are currently running coordinated marketing campaigns across all channels. As the core component of your company’s communication with leads, email can play a role in maintaining a consistent tone for multi-channel campaigns, delivering value reliably, and reinforcing other channels.

Lead Nurturing Optimization Best Practices

Don't "Set It and Forget It"

Complacency is all too common of an issue for marketers, especially with the degree to which modern nurturing campaigns can be automated. Everything from your goals to your KPIs to your lead scoring models need to be systematically looked over. In a fast-evolving sphere where new technology and new tactics are constantly coming into use, standing still, as Lauren Bacall said, is as good as moving backwards.

It is optimal to set monthly or quarterly meetings to examine the progress of your campaigns. Even if the results are positive, however, it is always worth reviewing suggestions and recommendations from your marketing team (and even from your sales team).

Keep Your List Clean

Regularly cleaning your contacts list will prevent you from sending emails, SMS, and other messages to leads who have opted out, marked your emails as spam, or bounced multiple times. Such recipients can mess with analytics and clutter up your contacts.

Removing inactive leads, however, is a step that requires deliberation. It is up to you to define the period of inactivity that deems them necessary to remove from your contacts. It may be wise to send a last "this is your final email" communication to attempt to retain some customers. Prior to this, inactive leads can be re-segmented to receive less frequent emails, perhaps with more appealing offers. For instance, a lead unresponsive to weekly emails with content offers may better engage with monthly, higher-value product offers.

Additionally, keep in mind that bounces and inactive recipients are two distinct issues, and make sure to devote attention to the former. While hard bounces should be removed immediately, soft bounces still carry some potential. Finally, consider purchasing email lists from a trustworthy outside provider (provided the data is useful for targeting your intended audience).

Avoid Making Assumptions

Though common sense and intuition can be useful in constructing elements of a campaign, the proof ultimately lies in the data. This doesn't necessarily only entail cold, hard numbers. For this reason, both quantitative and qualitative data have their roles to play in analyzing the effectiveness of your nurturing.

Nevertheless, extrapolation can be the downfall of a developing nurturing campaign as market, industry, and even general economic conditions change. Self-confidence is an important asset, but too many marketers choose to dismiss the results measured by their carefully researched metrics based on “gut feeling” or no longer applicable past patterns. Modifying your strategy is not an indicator of failure—on the contrary, it marks success by demonstrating adaptability.

Best Practices for Lead Nurturing Content

Don’t Be Self-Centered

In trying to exhibit a product in a way that seems most appealing to them, many marketers often forget the golden rule: customers care about content that most directly carries value for them, not for you. While highlighting innovation and company reputation can carry advantages, content oriented around pain points will yield far greater results.

When adding information to any content piece, consider whether it is directly relevant to the customer needs. At the end of the day, lead nurturing is not intrinsically about selling product features or a brand image, but the full experience that a client receives when choosing to commit to your company.

Coordination is Key

Coordinating your content across different outlets and platforms can be one of the most difficult aspects of the content strategy. Here are some tips for aligning content creation and publication across all of your major channels.

Map content themes with detailed buyer personas

Consider how your content can support particular personas’ needs using analytics software, social media feedback, industry influencers’ writing, keyword research, etc.

Keep up with your editorial calendar

A must-have asset for organizing your strategy, the calendar should not only set publishing deadlines, but ones for stages like drafts, general planning, routing, and editing. A tool with social sharing scheduling features is ideal for maximizing your content’s visibility.

Communicate consistently

Make sure your teams are interacting regularly both in-person and through digital platforms (which can be made exclusively for communication or incorporate it as a feature, like a CMS) to ensure you are maintaining content quality, answering any potential questions, and staying on deadline.

Determine KPIs and metrics

Some examples include engagement, conversion, referrals/shares, top pages visited, average reading time spent on page, etc.

Make use of content workflow tools

Look for key features like status and productivity tracking, buyer persona templates, editorial calendars, persona templates and content strategy integration, real-time user collaboration and editing, and social media integration.

Use Gated Content (In Moderation)

Experimenting with different types of nurturing content is wise when optimizing your strategy, and some marketers turn to gated content as a means of facilitating value exchange between company and lead. As a fresher, gated content provides a valuable asset in exchange for personal information such as name, email address, company name, etc., and can be applied to a variety of marketing assets like whitepapers, demos, eBooks, and videos.

Though often discussed in reference to lead generation, gated content can also have a place in nurturing. While content without a gate can be useful in building trust by offering value upfront, gating is optimal when a lead has taken an interest in your company, considered its credibility, and is ready to receive higher-value content. A filled form is a greater indicator of engagement than a click-based “response”, which may be indicative of a passing interest.

Fortunately, gated content can often be created by recycling existing content, even pieces which aren’t major assets, such as blog articles. Just pause to consider when it is best to gate and which type of content is worth gating—scoring and segmentation are vital resources once again in this situation to ensure your audience is ready and willing to participate.

Lead Interaction and Personalization Best Practices

Include Third-Party Data in Lead Scoring

Most marketers making use of behavioral data when creating lead scoring models rely on first party engagement data—free, relatively easily attained information that comes directly from interaction with a consumer, such as personal information, purchase history, engagement with your digital channels (downloads, clicks, visits, etc.), and various other behaviors. First-party data is generally considered more accurate and more reliable than third-party data.

However, this data tends to exclude leads who are closer to the beginning of the buyer's journey, conducting online research, reading reviews and publications, and devoting attention to industry influencers. After all, the average buyer conducts 60% of their research before reaching out to a company. This is where third party "intent" data comes in.

Despite being collected at a more preliminary stage in the buyer's journey, third party data—collected based on actions taken by a lead on the broader web outside of your own digital properties—is still very much relevant to lead scoring for nurturing, as it can indicate their buying intent early on and help to inform sales and marketing on how and when to reach out to them further down the line. It can be licensed or purchased from a data collector, but is cost-effective when utilized properly.

Major sources of third party intent data can include:

- Social media
- Online search
- Analyst reports
- Buying guides sites/Software review sites
- Events
- Publication sites

Social media activity in particular has proven highly valuable to collecting third party data. With recent advances in technology, social media activities can be traced to real user identities and relevant contact information, among other data points. With a combination of first and third party data, marketers can create more intricate scoring models.

Send Data Enrichment Emails

Data enrichment emails enable you to learn more about leads over time and inform your segmentation and personalization. These emails contain short surveys that ask the reader to identify with a particular answer that relays information about their demographics, behavior, or otherwise. The answer options are in the form of clickable links, which update the recipient's contact record with the information.

Examples of potential data enrichment questions include simpler ones about company size, job title, or budget, and more complex ones about the types of products in which the lead is interested and the varieties of content they would prefer to receive. Enrichment emails not only provide you with useful information, but may be reassuring to your leads, who will feel that their input is valued.

Personalization as a Holistic Experience

Finally, keep in mind that personalization is a commitment at every stage of the customer life cycle. The stronger and more dynamic your segments, personas, and overall data strategy, the better equipped you are to deliver on this commitment.

Personalized elements in email headings should be followed through on in more substantial areas, like tailored offers or bottom of the funnel experiences (e.g. landing pages) after a call to action has been taken. In designing a holistic personalization experience for any major campaign element, it can be helpful to begin with an end goal and work backwards.

For instance, if the goal is an event registration, begin with considering personalized elements in the registration thank-you page or email, then on the landing page for the event, then the original email inviting leads to register. In addition, address the differences in format and accessibility of elements like emails and site pages between different devices, the two main categories being desktop and mobile. It is important to create versions that accommodate more than one kind of browsing experience and behavior.

Best Practices for Integrating Lead Nurturing into Your Overall Strategy

Consider Overall Brand Experience

When placing your lead nurturing campaign in the context of your overall strategy, brand experience is a significant commitment to stand by. Consistency in design, tone, personas, and themes delivers an appealing brand promise of what leads and customers can expect from their interactions with your company, both within and outside of lead nurturing.

On a more superficial level, consistency involves elements including:

- Color schemes and logo designs
- Typography
- Imagery rules and page design
- Copywriting guidelines

On a deeper level, brand experience delves into your company objectives and values, exemplified by the:

- Mission statement
- Slogan
- Company story
- Primary audiences
- Particularities of your industry
- Definition of the buyer's journey

Adhering to the guidelines necessary to produce a brand experience that leads find meaningful and engaging requires a combination of automation and "human touch", depending on the complexity of the elements being managed. These guidelines should be used, maintained, and improved by team members at every step of the marketing funnel, and conveyed to any third-party contractors that contribute to your campaigns.

Keep Filling the Funnel at the Top

Nurturing leads effectively requires them to have been acquired in the first place, via a strong lead generation/capturing strategy. So, it's important to continue creating more lead capturing opportunities and filling your funnel.

Having examined in depth over the course of this series the major channels around which lead nurturing is built, consider which of these double as channels for lead generation—for example, your company site, emails, blog, and social media. How can these efficiently be used to both generate and nurture? How do posts and pages compete with one another, and how can they be synchronized to create a multi-functional, cohesive set of assets? Explore also how content can be repurposed and upcycled efficiently between generation and nurturing.

In addition, while the focus remains on inbound marketing, a well-rounded generation strategy can, and even should, include an outbound component to amplify inbound efforts and target specific opportunities. Outbound marketing introduces your message and content to prospects through "rented attention" with an obvious call to action, potentially pushing them through the funnel at a faster rate than inbound marketing can. Determining the perfect outbound-inbound mix for your company's needs will be up to you!

Make Sure Your Sales Team is On Board

It's been said time and time again, but we keep reiterating the importance of communication between the marketing and sales teams because it continues to hold true! Perhaps the largest mistake marketers can make with lead nurturing is in failing to discuss the launch and progress of their campaigns with the rest of the company. Nurturing affects the bottom of the marketing funnel, and sales has a crucial role to play that needs to be informed by the nurturing strategy.

For example, if sales representatives are talking to these leads simultaneously or after the running of a nurturing email campaign, they should be informed of the content which has been distributed and the timeline it has been distributed over. This allows them to carry a more productive conversation that takes into account what their leads already know.

Ensure that your lead management and nurturing software integrates with the CRM (customer relationship management) software used by your sales team. In the case that integration is not possible, or you do not use a CRM, it is necessary to find another method of sharing primary information about your list of leads, content, segments, and offers.

Congratulations. You have just completed the Lead Nurturing Masterclass! While the previous lessons had exercises to apply what you've just learned, we're confident you're ready to go forth, follow these best practices, and start creating your next out-of-this-world lead nurturing campaign today.

It has been a pleasure to have you and we wish you the best of luck in your lead nurturing endeavours. Come back anytime, and be sure to tell your friends about us!

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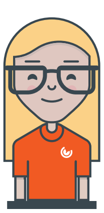

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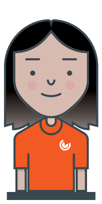

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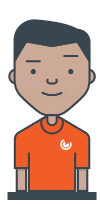

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