THE COMPLETE GUIDE TO LEAD NURTURING

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Maximize your revenue with lead nurturing.

Lead nurturing, also called drip marketing, is one of the most powerful and sought-after features of a marketing automation system. With the ability to drive revenue from a database of leads that you've already built — with minimal investment on the part of sales and marketing — lead nurturing has the potential to transform the way you do business.

At its core, lead nurturing is the process of automatically "dripping" relevant information via email to sales leads over time, usually based on user action or a predetermined time interval. Using nurturing capabilities, emails can be sent to prospects at exactly the right time, reducing much of the manual labor involved in sales communications. The benefits of this are numerous, and extend far beyond simple sales functionality.

Interested in learning more about this feature, and how it can help align your sales and marketing teams, boost revenue, and get the most out of your database of hard-earned leads? Take a look at the rest of this white paper to get more information on the benefits of lead nurturing, how it works, and the types of campaigns that your team can run — then check out the compilation of checklists, tip sheets, and worksheets at the end to put what you've learned to good use.

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Why Lead Nurturing?

The real power behind lead nurturing comes from its ability to automate thoughtful communications. With a nurturing program in place, your prospects are no longer getting spammed with generic sales emails — they're receiving targeted communications based on their own activities, interests, and more. Take a look at the rest of this chapter to get a better idea of some of the benefits of lead nurturing.

> **Nurtured leads produce, on average, a 20% increase in sales opportunities versus non-nurtured leads.** *(DemandGen Report)*

Sales can be as involved as they want to be.

The beauty behind nurturing is that even though it's often used to automate sales communications, your sales team hardly has to be involved in the nurturing process. Lead nurturing allows each team to play to their respective strengths: for marketing, this means messaging, email creation and targeting, and the development of campaigns that can successfully nurture leads to sales-readiness. Your sales team, on the other hand, can focus on doing what they do best: selling your product.

No wasted time educating leads.

Your sales reps are busy, and don't want to waste time on leads who aren't ready to buy. Marketing can use a marketing automation tool to put these non sales-ready leads on nurturing tracks, which will automatically move leads through the sales cycle until they're ready to speak to a sales rep. Use drip campaigns to build awareness by sending educational materials over time, then rest assured that your sales team won't be left dealing with a blank slate when leads become active again. For the leads who are investigating your product but aren't quite ready to buy, use nurturing to ensure that they're as educated as possible by the time they're ready to talk to a sales rep.

Personalized 1:1 email messages.

Not only do nurturing emails deliver the right content at the right time, they also deliver *personalized* content. In fact, according to eConsultancy, businesses who are personalizing web experiences are seeing a 19% increase in sales. By using plain-text emails instead of HTML (see more about the benefits of this in **chapter four**), including a personalized signature from a sales rep, taking advantage of variable tags, and sending content based on your prospects' actions or interests, your sales emails can reach that 1:1 marketing ideal.

> **Businesses who are personalizing web experiences are seeing a 19% increase in sales.** *(eConsultancy)*

Do more with less.

Today's marketing and sales teams are strapped for time and resources. With only a limited amount of both, it's easy to let something like sales follow-ups slip through the cracks. Think of lead nurturing as a simple way to outsource many of the time-consuming, manual tasks that take up your marketing and sales' teams time. Now, you can use that time to pursue more strategic marketing initiatives.

Use nurturing for more than sales.

While much of the emphasis has been placed on automating sales communications, lead nurturing is equally useful for campaigns aimed at new or existing clients. Use nurturing campaigns to welcome new clients, distribute helpful training information, send important best practices information, and more. You can even use nurturing tracks to upsell current clients, promote new or different packages, or run campaigns focused on renewals.

Now that you're familiar with all of the benefits of lead nurturing, you're ready to get a more in-depth look at each type of campaign you can run with an automation tool. Take a look at the next chapter for more information.

10 Nurturing Campaigns Worth Trying

Lead nurturing is a powerful tool for sales and marketing, but also for your customer service team. Let's look at 10 different campaigns you can run that cover the length of the entire buyer journey, from initial awareness to a loyal (and hopefully repeat) customer.

Engagement Campaigns

1 *Welcome Campaign*

Welcome emails are highly anticipated, frequently opened, and simple to automate. By turning your welcome emails into a drip campaign, you can introduce prospects to your company, product, or service at a comfortable pace, instead of flooding them with information right off the bat. Remember to remind them why they converted, confirm their opt-in, and start providing them with light educational content to build awareness and keep them interested.

2 *Top-of-Mind Campaign*

The top-of-mind drip is designed to engage with your leads at regular intervals, preventing leads from forgetting about your company and getting swooped up by your competitors. This drip takes place over a longer period of time, providing sales with consistent touch points, and provides content primarily focused on value to the prospect. Some great content to consider for this type of drip would be blog posts, white papers, videos, webinars, infographics, and relevant industry news.

Another use for the top-of-mind drip would be for event and webinar follow-ups. If you engaged with a lead during an event or a webinar, you'll want to keep this engagement going via targeted follow-up emails that pass on additional, relevant content. This gives leads an opportunity to take a high-value action that could trigger assignment to a sales rep.

> **90% of business buyers say when they're ready to buy, they'll find you.** *(DemandGen Report)*

3 *Reengagement Campaign*

At any given time, your database is full of leads who are actively participating in the sales cycle, and equally full of leads who became inactive at some point during the sales process. Reengagement campaigns are targeted toward these inactive leads, with the ultimate goal of prompting them to take some sort of "hand-raising" action, which would indicate that they are ready to reenter the sales process. Try sending a helpful blog post, a new white paper, or a successful case study for these kinds of drips.

Educational Campaigns

4 *Product-Focused Campaign*

As prospects progress through the sales process and begin to seek out more product-focused content, you'll want to make sure they're getting the right product information from you, instead of a competitor or biased third party. Focus on your prospects' pain points, how your product can address them, and the key features and benefits that will help along the way. For this type of drip, you'll want to use case studies, customer testimonials, data sheets, and more in-depth white papers.

5 *Competitive Drips*

This campaign focuses on differentiating your product or service from your competitors by highlighting the advantages of using your product, as well as the disadvantages of not using it (note: you'll want to refrain from harping on the disadvantages of your competitors' products, since this can come off as distasteful). Tailor your content to the priorities of your prospects and the competitors that come up in deals with your company.

> **Companies that excel at lead nurturing generate 50% more sales-ready leads at 33% lower cost.** *(Forrester Research)*

Closing Campaigns

6 *Industry Expertise Drips*

As prospects move closer to the middle of the funnel, it becomes important to reinforce that your company is the right choice. Pass on any helpful press releases, industry reports, or high-traffic content as part of this drip to establish your company's authority. For example, if your company was recently covered by an analyst report, be sure to share it with your prospects and put your own spin on the review.

7 *Promotional Drips*

As your prospects near the purchase stage of the sales funnel, a well-timed promotion or special discount can be just the catalyst they need. Consider offering special pricing or additional features based on their individual needs, especially if you're working with bigger accounts where closing the deal is critical to growing your business.

Retention Campaigns

8 *Onboarding Campaign*

Onboarding a new client will always be a high-touch and manual process, and rightly so. However, nurturing campaigns allow you to automate some of the more repetitive tasks involved in onboarding, like providing introductory training resources, a list of next steps after close, timelines for product kickoffs, and frequently asked questions. These helpful resources can help your new clients get started on their own, without having to wait on a customer service rep for assistance.

9 *Upsell Drip*

The upsell (or cross-sell) campaign is designed to capitalize on your existing pool of clients. By providing your clients with information and incentives to expand the list of products they are using, you can drive more revenue with little effort from your sales team — and help your clients see more of your product's value. Just be sure to focus your message around the benefits of the upsell, instead of sending them a sales pitch.

10 *Renewal Campaign*

The renewal drip can be a convenient way to remind your existing customers that it is time to renew their contracts, and show your appreciation for their continued business. This drip can be triggered a month (or more) before the renewal date, send multiple reminder emails over a specified period of time, and notify the assigned user in the marketing automation tool if no action takes place. This makes it far less likely that your clients will miss the renewals on their contracts, takes the tedium out of the process for your service reps, and improves your retention rates.

Have you picked out the campaigns that will work best for your business? Start thinking about how you can implement them by reading through the next chapter, which will take a look at how lead nurturing actually works.

How Does It Work?

The benefits of implementing a lead nurturing program are pretty self-explanatory, but how does nurturing actually work? Let's take a look at some of the mechanics behind nurturing to see the steps involved in setting up a successful nurturing program.

Decide what type of campaign you would like to run.

As discussed in the previous chapter, there are several different types of programs you can run based on what you want to accomplish. Are you hoping to revive inactive leads, or remind your current clients that renewals are fast approaching? Your next steps will hinge on this initial decision.

Choose the list you would like to nurture.

Lists and segmentations are the reason that drip emails can be so highly targeted. If you want to nurture a specific segment of your database, sort these prospects or clients onto the same list. A few use case scenarios for this would be nurturing programs designed to target specific locations, certain product segments, new users, leads who have been cold for longer than six months, and more.

Set up your drip logic and decide on your content.

Once you've decided which list to target with your campaign, you're ready to set up your drip logic and choose your content. There are several items to consider here:

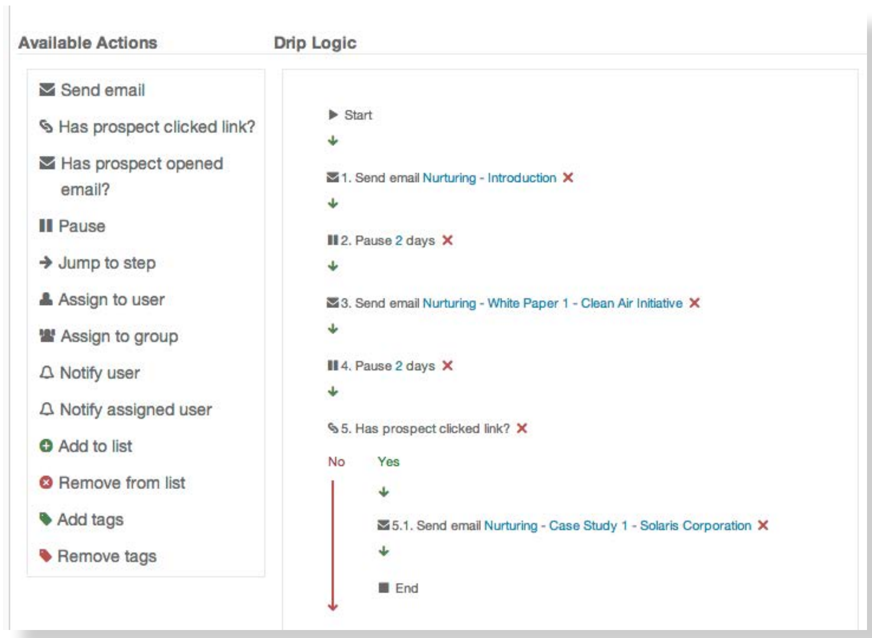
How often will you be sending drip emails to this list?

This will depend on the type of campaign you're running. If you have a long sales cycle and are targeting a list of inactive leads, consider spacing emails further apart. Other emails, like training emails or time-sensitive renewals, might be spaced closer together. As a general rule of thumb, we recommend sending emails between six and 45 days apart to prevent sending more than one email in one week, or going more than a month and a half between touch points.

How complex do you want your drip campaigns to be?

Your nurturing tracks can be as simple or as complicated as you want — it all depends on the drip logic that you create. Nurturing campaigns can be set up linearly, where prospects will progress through them in straight lines, or they can have different branches (or paths) that prospects will embark upon depending on their responses to each email (content downloaded versus an unopened email). Take a look at the image to the right to see what a drip campaign might look like in your marketing automation system.

Drip Campaign Logic



What content would you like to offer?

You'll want to choose content that's appropriate for the type of drip that you're creating. If it's a simple nurturing track for sales leads, send content based on your prospects' known interests. Keep in mind that your content will vary depending on how far your prospects have progressed through the sales cycle. For help targeting your content to the stages of the sales cycle, see the worksheet on **page 16**.

What will trigger each prospect to move to the next stage of the drip program?

Lead nurturing is a type of trigger-based marketing, a technique that allows marketers to deliver highly-relevant messaging based on a prospect's response or reaction to a stimuli. In the case of nurturing, marketers can use actions like opening an email, clicking a link, downloading a piece of content, or the passage of time to trigger the next stage of the nurturing program. Here are a few examples of what could result based on these actions:

- sending another email
- sending a notification to a sales rep
- automatic assignment to a sales rep
- removing the prospect from the drip

Deploy and track progress.

Once you've selected your lists and created your drip logic, you're ready to deploy your nurturing program. While these campaigns will run automatically with little additional work on the part of marketing or sales, you'll want to keep an eye on them to see how they're performing.

Use the drip reports in your marketing automation tool to see how many people have progressed through each stage of the program, the number of prospects that have been sent each email within the program, the number of bounced emails, and total clicks and click-through rates for all of your drip emails. Use this information to adjust and optimize your campaigns for optimum performance.

Now that you know how nurturing campaigns work, and how to set them up in your own system, check out the best practices provided in the next chapter.

Learn More

Ready to get your hands dirty with lead nurturing? Check out our **interactive Lead Nurturing Lab** to practice building campaigns of your own.

Lead Nurturing Best Practices

Before you start deploying your new nurturing campaigns, it's important to have a solid understanding of lead nurturing best practices. This will prevent you from spamming your recipients with unwanted emails, ensure that your emails are optimized for conversion, and help make sure your messages are always delivered to the right people at the right time.

Touch Base with Your Sales Team

While nurturing emails don't require any manual work from sales, you'll still want them involved in the nurturing process. Without any intel from sales, marketing is forced to guess at the best approach to automating sales communications. Your sales team is on the front lines when it comes to dealing with prospects, and has the best understanding of your prospects' pain points, needs, and interests. Touch base with them on a regular basis to see how they can get the most value out of your nurturing programs. Keep in mind: while this communication is important for your marketing team, it's equally important for your sales team so that they can get better visiblity into the messages their prospects are receiving.

Target Your Communications

One of the biggest draws of lead nurturing is its ability to target communications on a 1:1 level. Don't ignore the advantages this offers by nurturing huge chunks of your database with generic communications. Use the segmentation capabilities at your fingertips to sort leads and clients in your database into targeted lists, then develop exclusive content for each list (for example, developing different nurturing tracks for CMOs, CSOs, etc., and then creating content targeted specifically toward C-level executives). Remember, according to Juniper Research, relevant emails drive 18x more revenue than broadcast emails.

> **Relevant emails drive 18x more revenue than broadcast emails.** *(Juniper Research)*

Make It Easy To Unsubscribe

Just like with any email communication, you'll want to adhere to general email best practices. This means having a clear "unsubscribe" link or a link to your email preferences center, where users can control which emails they do and do not want to receive from your company. Don't risk getting blacklisted over a simple nurturing email — make it obvious and clear that your recipients are still control of what they receive from you, and how often they receive it.

Include Obvious Calls to Action

The point of any lead nurturing email is to elicit some sort of action on the part of the recipient, whether it's clicking a link, downloading a piece of content, or responding with further inquiries. For any of these actions to occur, your calls to action (CTAs) need to be clear, concise, and prominently placed, so that your recipient always understands your value proposition and what action is required of them. For more information on CTA best practices, check out our CTA Tip Sheet on **page 18**.

Consider Using Plain Text Emails

Which email would strike you as more personalized: an HTML email with your name substituted into the first line, or a plain text email with a few lines of content and a personalized signature from a name you recognize? As a best practice, we recommend using plain text emails for sales communications to achieve the look of a personalized, one-to-one email, though HTML emails are often still appropriate for client communications like training emails, or for drips that are clearly intended to be from marketing rather than a sales rep.

Be Strategic with Your Timing

As stated in chapter three, the timing of your drip emails should be between six and 45 days. However, this doesn't mean that you should pick a standard timeframe that applies to all of your nurturing programs. Be strategic with your timing. When will your prospects see the most value from your communications? Use triggers to ensure that emails are delivered at exactly the right time, keeping in mind that 53% of buyers stop engaging as soon as content becomes irrelevant (Cone Consumer New Media Study).

Use Nurturing to Qualify and Assign Leads

According to MarketingSherpa, 61% of marketers pass all leads directly to sales; however, only 27% of those leads are qualified. Instead of passing along a slew of leads in which 73% are unqualified, marketing can take these non-sales-ready leads and place them on nurturing tracks to further qualify them. Using an automation system, you can then automate lead assignment based on your prospects' responses to your nurturing program, ensuring that leads are getting passed to your reps at exactly the right time (remember: talk to your sales team to find out which prospect actions they deem most important, so you'll know when to get your reps involved).

> **61% of marketers pass all leads directly to sales; however, only 27% of those leads are qualified.** *(MarketingSherpa)*

Create Supporting Content

Content forms the foundation of your lead nurturing programs, and many companies find themselves grossly underprepared for marketing automation from a content perspective. Think of it this way: if lead nurturing is the engine, content is the fuel that makes it run. Before launching any new nurturing programs, make sure that you have the content in place to support them, whether that means developing a store of white papers, blog posts, webinars, or any other appropriate content. This will prevent you from having to backtrack when you begin launching your first nurturing campaigns.

While these are a great start for lead nurturing best practices, remember that better practices are evolving every day. Find a system that works for you, and do your best to stay up to date on the latest best practices for your industry.

Get Started

Take a look at the tip sheets, worksheets, and checklists provided on the following pages to start putting everything you've learned into practice.

1. *Lead Nurturing Tip Sheet*
2. *Content Mapping Worksheet*
3. *Planning Checklist*
4. *Campaign Worksheet*
5. *Call to Action Tip Sheet*

LEAD NURTURING

TIP SHEET

Designing nurturing campaigns that effectively move prospects through the sales cycle is a learning process. Following the best practices below will help ensure that your campaigns deliver maximum value and impact.

Segment

Segmenting your prospects will show them right away that you are focused on them and their situation, not simply spamming hundreds of recipients on a list.

Get Personal

After you have segmented your lists, add some personalization. Customization can go well beyond using a recipient's name in the email's salutation.

Lend a Hand

It is important that you use every email you send to provide value to your readers. Show your prospects that you have the resources and drive to help them.

Present a Value Proposition

You need to state the value proposition of each piece of content in order to demonstrate your expertise and the value your company offers. Recipients should never wonder why they received an email.

Link to Additional Resources

Where it is applicable, add links to additional content to draw prospects to your site where you can track and record what they are searching for and what interests them.

Focus on Your Prospects

The most important thing that you can do to ensure the success of your lead nurturing campaign is also the most obvious: focus on the prospect.

LEAD NURTURING PREP CHECKLIST

Successfully implementing lead nurturing campaigns requires laying a solid foundation of responsibilities and processes. The checklist below will help ensure that you start off on the right foot.

① **Define Your Audience Roles**
Who is involved in the purchasing decision? What are their main concerns?

② **Understand Your Sales Cycle**
Know the stages of your sales cycle and what defines each one.

③ **Have a Store of Content**
Content is the key to nurturing success and you need to have plenty created.

④ **Map Content to Sales Cycle**
You need to know which pieces of content are best for each buyer stage.

⑤ **Understand Timing**
Know the length of your sales cycle and how often you can contact prospects.

⑥ **Define Your KPIs**
Understand and track the metrics that will indicate the success of a campaign.

⑦ **Determine Responsibilities**
Determine who is in charge of creating, monitoring, and updating campaigns.

⑧ **Test. Test. Test.**
You'll never get it right the first time. Be prepared to track and iterate.

CONTENT MAPPING
WORKSHEET

Sales Cycle Stages

Write a description of each stage of your sales cycle below.

Stage: (there may be more or less than 4)

01 Top of funnel, middle of funnel, bottom of funnel, etc

02

03

04

Audience Roles

Who are the major influencers in a purchasing decision?

Audience: (there may be more or less than 4)

01 CMO, c-level, general manager, etc.

02

03

04

Mapping Your Content

Each stage should have content that fits your audiences' needs best. Write the name of the content that corresponds with each stage.

STAGE 1	01	02	03	04
STAGE 2	01	02	03	04
STAGE 3	01	02	03	04
STAGE 4	01	02	03	04

NURTURING CAMPAIGN
WORKSHEET

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The Campaign

Let's record the basics of your campaign first.

Title:

Target: Who is the intended audience?

Stage of the Sales Cycle:

Trigger: Email open, content download, page view, etc.

Campaign Steps

Define the steps of your nurturing campaign and how you will proceed if an action is taken. Use more than one sheet if needed.

Drip Content:

Pause: Days

Action Taken by Recipient? (y) (n)

Follow-up:

Drip Content:

Pause:

Action Taken by Recipient? (y) (n)

Follow-up:

Drip Content:

Pause:

Action Taken by Recipient? (y) (n)

Follow-up:

CALL TO ACTION

TIP SHEET

Calls to action can be tough, and there's no set formula that will guarantee success. Here are a few general guidelines you can follow to keep yourself on the right track.

Keep It Short

Calls to action should be short and concise. Keep them as to-the-point as possible.

Make Them Obvious

Set your calls to action apart. They should be easy to find in your email, so consider using buttons or different colored text to differentiate them from the rest of your copy.

Don't Be Bossy

Use commands, not demands. You want your calls to action to encourage the recipient to take an action without sounding demanding. For example, use "Get" instead of "Download" whenever possible.

Indicate Urgency

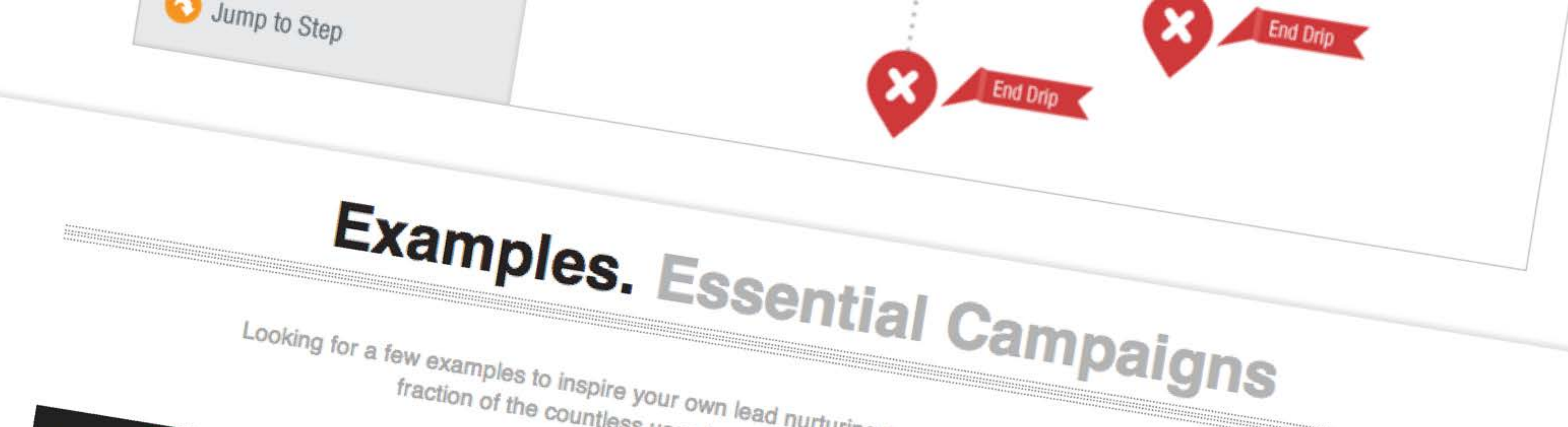
When possible, indicate a sense of urgency. Your users will be more swayed by offers that they perceive to be available for only a limited amount of time.

Convey Value

Tell your users what they're going to get, not what they need to do. Your call to action should convey that you're providing something of value, not pushing your marketing message onto them.

Test. Improve.

You can't improve what you don't measure. Use A/B testing to decide which calls to action perform the best, then optimize accordingly.



SEE IT IN ACTION

The Interactive Lead Nurturing Lab

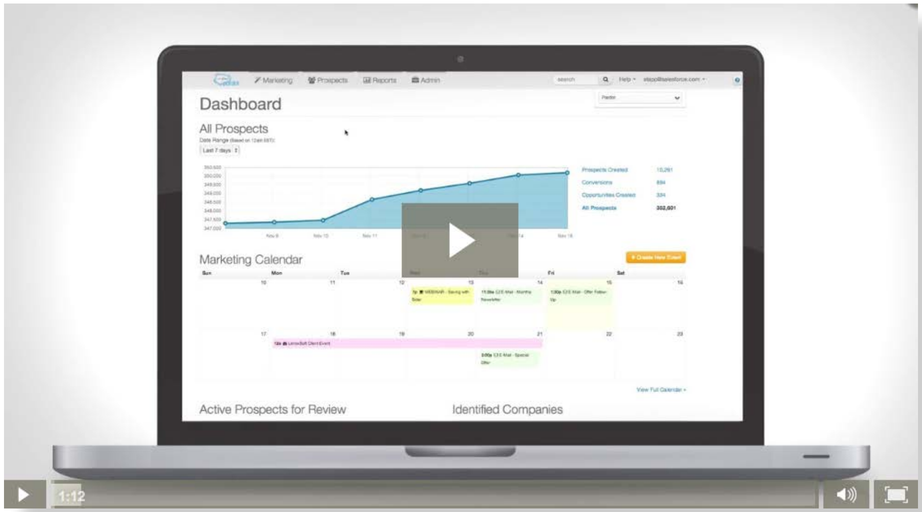
Ready to get started with lead nurturing?

Try our free, interactive Lead Nurturing Lab to get a hands-on look at building nurturing campaigns, the different types of campaigns you can run with a marketing automation system, and the benefits of implementing nurturing campaigns at your own company. Then, check out some of the additional, helpful resources provided at the end of the Lab.

Try it out!

Conclusion

Now that you understand the benefits of implementing a lead nurturing program at your company, it's time to pick a campaign and get started. Don't be afraid to start simple and build your way to more complex campaigns. Use the tip sheets and checklists provided in this guide as you begin creating your nurturing tracks, and as always, be on the lookout for more lead nurturing best practices evolving every day. Good luck!



Want to get more information about Pardot? Watch a quick demo by clicking on the screenshot to the right.

Take a Guided Tour!

Connect with us!

Notes:

Marketing Automation For The Customer Company

Your customers are smarter, more capable, and better informed than ever before. This new breed of consumer demands a better breed of marketing, and the Pardot platform has the capabilities to get you there.

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Smarter Marketing. Better Results.

Questions? Contact us at 1-855-426-9213, or visit our website at www.pardot.com