The Complete Guide to Lead Nurturing

salesforce pardot

Introduction

Selling in an on-demand world isn't for the faint of heart. Today's customers are researching on their own terms, and they expect interactions with your brand to be personalized and timely. Marketers must be ready to pivot on a dime. A 2015 IDC study commissioned by Salesforce found that 65% of B2B buyers only engage with a vendor sales rep after they've already made a purchase decision. The same study found that 83% of those customers only want to hear from you if you are able to be relevant and contextual. Otherwise, you're just another one of the many, many people distracting them from their long to-do list.

Companies and customers are actually pretty aligned on this. No marketer wants to feel like a spammer – they want to build a community of happy, successful customer advocates. And sales reps would much rather call on an engaged, warm lead who wants to speak with them than cold call all day. But personalizing every interaction and conversation across a large audience and a long sales cycle can be a daunting task. How can you make sure you are sharing the right information at the right time, and getting it to the right person?

There are only so many hours in the day, so the answer is to automate – very purposefully. A well-thought out lead nurturing strategy is one way that you can connect more effectively across all phases of the customer lifecycle. At its core, lead nurturing is the process of automatically "dripping" relevant messages to your leads over time.

Here's how it works.

Marketers build a number of different tracks to address various products of interest, pain points, common objections during the sales cycle, and more. Then, customers are placed on a track based on what we know about them. You're learning more about your customers every day – maybe they returned to your website to download a new e-book, or they requested a live demo from sales – so nurturing campaigns aren't static. Leads move in and out of different tracks based on the signals they are sending. And it's all automatic.

Sounds good, right? Read on to learn more about how nurturing can benefit your sales and marketing teams, plus get some campaign inspiration. Stick around 'til the end and you'll find some handy checklists, tip sheets, and worksheets, so you can put what you've learned into action.

Chapter 1: 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 list below to get a better idea of some of the benefits of lead nurturing, then flip to the next chapter for more information on the different types of campaigns you can run with a marketing automation tool.

More than a quarter of marketers (26%) get 10% to 20% better response from lead nurture campaigns versus standard campaigns, and another quarter get 20% to 30% better responses to lead nurture campaigns compared to non-nurtures. (Demand Gen Report, 2015)

Stop wasting time.

If sales engages a lead too early, they have to spend a lot of time explaining what your solution does and pitching the value. Nurturing has the power to significantly speed up your sales cycle by taking care of some of that education before a lead even reaches your sales team. It's effective for both those actively evaluating your brand, and those who aren't quite there yet – just make sure you use data to deliver the right message. A targeted nurturing approach ensures that they're as educated as possible by the time they're ready to talk to a sales rep, but doesn't feel too pushy.

Reactive dormant leads.

Your database was expensive to grow, but we often forget to tend to it over time. If sales does reach out, but can't connect, they move on to the next name – leaving you with a large pool of inactive leads. Nurturing can be a great way to revive the good ones and weed out the bad. Slowly start sending educational content and watch for signs of life. Then, rest assured that your sales team won't be left dealing with a zombie lead when they re-engage. Even better? You can keep leads out of the lead cemetery altogether by creating nurturing tracks for your sales team to use for leads that don't answer their calls. Just one easy click in the CRM lets them keep the conversation going while they focus on their hotter leads.

Personalize 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 rich-text emails instead of HTML (see more about the benefits of this in chapter 4), including a personalized signature from a sales rep, taking advantage of variable tags to insert the right details, and sending content based on your prospects' actions or interests, your sales emails can finally achieve that 1:1 marketing ideal, even at scale.

Do more with less.

Today's marketing and sales teams are strapped for time and resources. If you're balancing multiple priorities and doing everything manually, it's easy to go too long without checking up on your leads. 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.

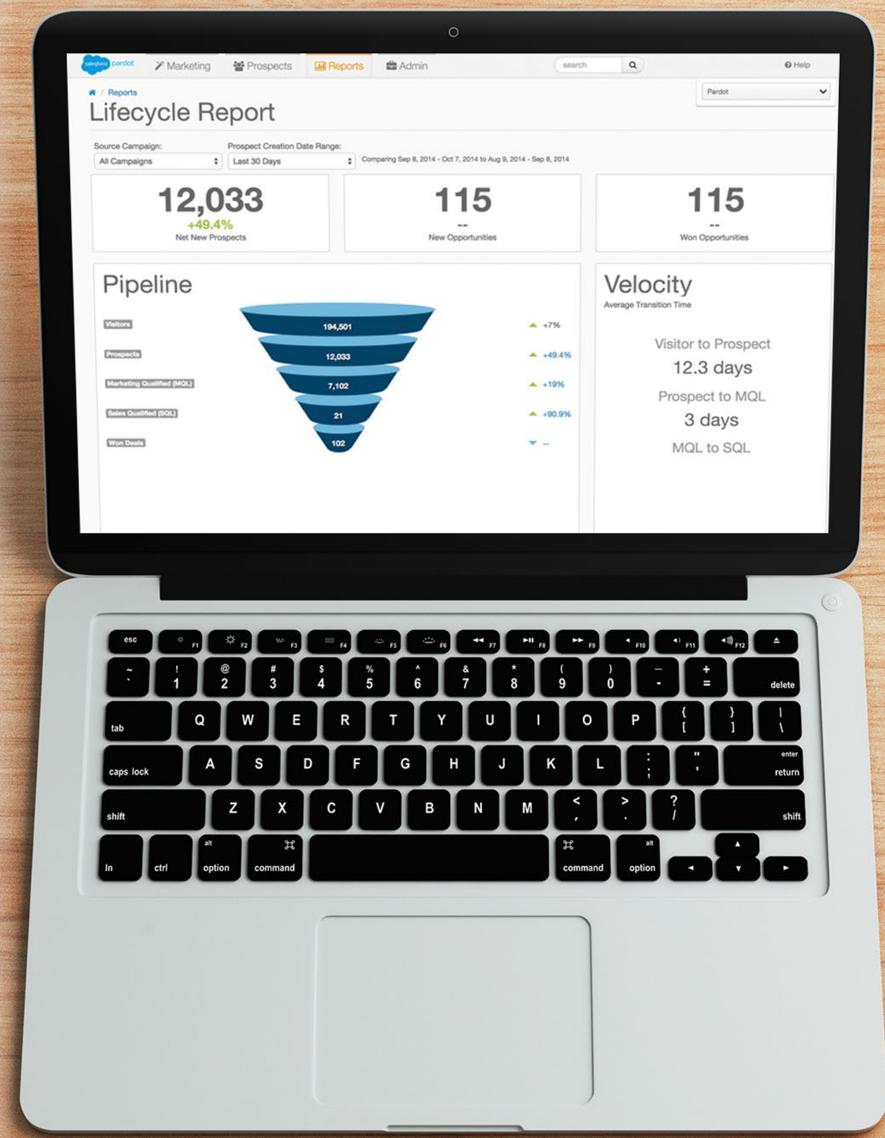
Use nurturing across the entire lifecycle – and internally.

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. Some companies also create internal nurturing tracks to onboard new employees and deliver ongoing training.

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.

Chapter 2: 10 Lead 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 ten different campaigns you can run that cover the length of the entire customer lifecycle, from initial awareness to a loyal (and hopefully repeat) customer.



Connect

1. Welcome Campaign

Welcome or fulfillment emails in response to a particular offer are highly anticipated, frequently opened, and simple to automate. By turning your welcome emails into a nurturing campaign, you can begin to establish a lasting relationship. In the initial email, remember to remind them why they converted, confirm their opt-in, and let them know what to expect from your program. Then, start providing them with light, educational content to build awareness and keep them interested. Be sure to keep it targeted based on the offer they converted on!

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 uses content primarily focused on value to the prospect. For early-stage leads, make sure to choose the right content. Start engaging them with interesting blog posts, helpful third-party content, and other content around related topics, and watch for key activities that indicate they are interested in learning more about your actual offering. These buying signals can trigger an automatic assignment to sales or shift them to a more product-focused nurture track.

3. Re-engagement Campaign

Not all of your prospects will make it through the sales process. 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. Re-engagement campaigns are targeted toward these inactive leads, with the ultimate goal of prompting them to take a "hand-raising" action, which would indicate that they are ready to re-enter the sales process. Try sending a helpful blog post, a new white paper, or a successful case study for these kinds of drips.

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

Educate

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. Be sure your sales team has visibility into all touchpoints with their customers so that they can tailor their conversations based on activity history.

5. Competitive Drips

This type of 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). Focus your content on the priorities of your prospects and the competitors that come up in deals with your company. A general differentiator campaign can be effective, but if you know that a customer is currently using or evaluating a particular competitor, you can really position your product to win.

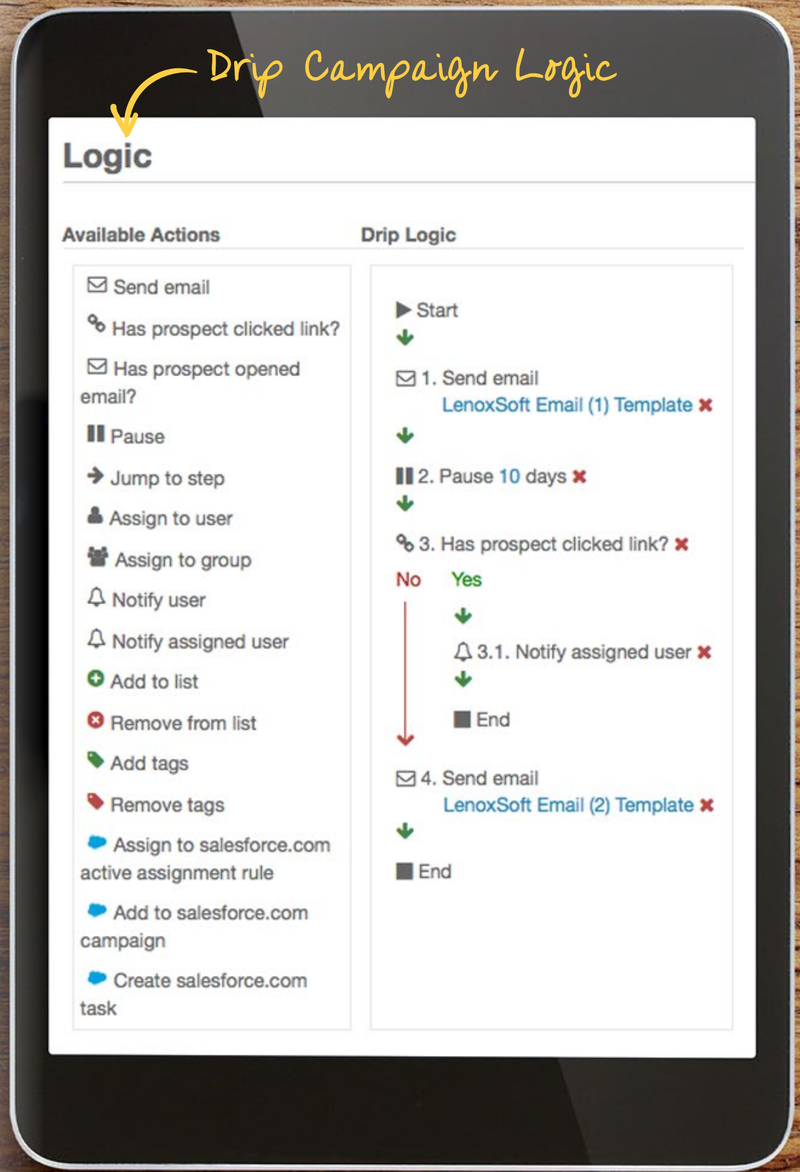
Close

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. This also works well for companies that use a free trial model. The right offer near the end of the trial can help encourage customers to commit.



Retain

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 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. Just be sure to focus your message around the benefits of the new offering, and remember to use a tone that feels friendly and approachable to your customers. Segment carefully, and avoid trying to sell to accounts that are currently having issues (hint: you can do this by setting up a dynamic suppression list).

10. Renewal Campaign

Renewal nurtures can be a convenient way to remind your existing customers that it is time to renew their contracts. 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 account manager if no action takes place. This makes it far less likely that your clients will miss the renewals on their contracts, and takes the tedium out of the process for your service reps.

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, from triggered messaging, to sales assignment, and more.

Chapter 3: 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.

1. Choose the 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? Remind your current clients that renewals are fast approaching? Your next steps will hinge on this initial decision.

2. 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. Need some inspiration to get your wheels turning? Try segmenting by specific locations, certain product segments, new users, or leads who have been cold for longer than six months. You can use logic rules to filter your prospects accordingly; this will also ensure any new prospects entering your database are evaluated and added to the campaign automatically.

3. Build up your flow and decide on your content.

Once you've decided which list to target with your campaign, you're ready to develop your drip campaign 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 30 days apart (to prevent sending more than one email in one week, or going more than a month 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).

- *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 an offer. 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. Rules can also be set to look at the entire scope of interactions an individual has with your brand, so you can adjust the nurture track based on any digital interaction you track.

  How does this look in action? Here are a few examples:

  - You invite a list of customers to register for an upcoming webinar. Those who don't open the email receive a follow-up invitation a few days later, while those who click to register are thanked and sent a related blog post.

  - A prospect on a early-stage education nurture accesses your latest e-book offer, views several key pages on your website, and watches a video. Her lead score shoots up quickly! She's removed from the education drip and assigned to sales. The sales rep gets a notification, and can quickly review her activity history so he understands exactly what she's interested in.

- The year is coming to a close – you know that means many companies you target are trying to use up remaining budget. You decide to start a nurturing campaign for leads that haven't engaged with you in a few months. Your first message includes some information about your new product features. When someone opens the email and engages, their sales rep is alerted. Those who don't engage are sent a series of special incentive offers to nudge them along.

- Hooray, you closed a deal! When someone becomes a client, they are automatically removed from your sales nurture and added to a customer engagement program.

• *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.

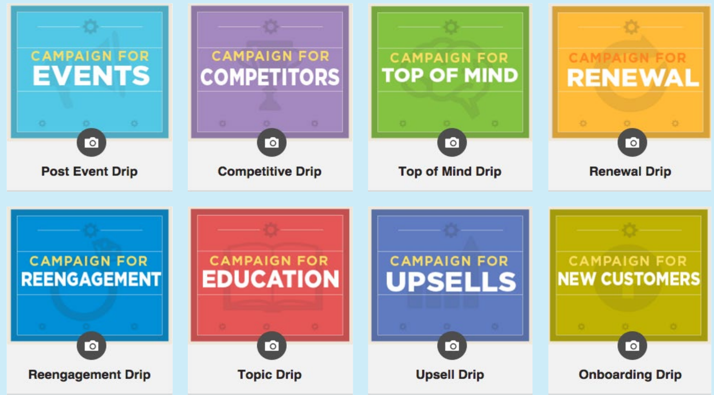
To start mapping your own campaigns, check out the worksheet on page 15.

4. Deploy and track progress.

Once you've selected your lists and created your drip logic (covering each of the steps in the point above), 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. Take a look at 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.

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



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 to make sure that your nurturing campaigns perform to their maximum potential.

Chapter 4: 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 prospects and clients with unwanted emails, ensure that your emails are as optimized for conversion as possible, 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. You'll also want to make sure they are aware of the programs you are running, and you each understand and when the other is interacting with customers, so that you don't bombard prospects with too many communications. Touch base with them regularly to see how they can get the most value out of your nurturing programs.

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, and other job titles – then creating content targeted specifically toward c-level executives).

Targeted, segmented, activity-based or life-cycle based emails are better received by buyers, accounting for more than 75% of all email marketing revenue. (DMA, 2014)

Make it easy to unsubscribe.

Just like with any email communication, you'll want to adhere to general email best practices. This means using opt-in methods to build your list, and having a clear "unsubscribe" link or a link to your email preferences center that allows users to control which emails they want to receive. Don't risk getting blacklisted over a simple nurturing email – make it clear that your recipients are still in 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 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 call to action best practices, check out our Call to Action Checklist on page 20.

Consider using text-based 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 including some text-based emails, especially for communications from sales reps, to achieve the look of a personalized, one-to-one email. HTML emails are still appropriate when used thoughtfully, like for early-stage marketing emails and client communications, including training courses.

Be strategic with your timing.

As stated in chapter three, the timing of your emails should be between six and 30 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).*

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, be 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. To help supplement your campaign and provide value, you can also reference third-party articles (with credit, of course!). Don't let lack of content get you down – you can always add more touch points to your nurture along the way; just build up enough to get started, and grow from there!

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. On the following pages you'll find a number of worksheets and checklists you can use to start building your own lead nurturing strategy.

WORKSHEET ONE

Buyer Personas

Use this worksheet to identify concerns and questions that you need to address for each of your buyer personas at each stage of the sales cycle. Depending on how many buyer personas you will be working with (initiator, influencer, decision maker, etc.), you may need to print off several copies.

PERSONA 1

STAGE	QUESTIONS/CONCERNS
EARLY	
MIDDLE	
LATE	

PERSONA 2

STAGE	QUESTIONS/CONCERNS
EARLY	
MIDDLE	
LATE	

Campaign Planning Checklist

Successfully implementing lead nurturing campaigns requires laying a stable groundwork of responsibilities, understanding, and processes. The checklist below will help ensure you start off on the right foot.

- [ ] **Define your audience roles.**
  Who is involved in the purchasing decision? What are their main concerns?
- [ ] **Understand your sales cycle.**
  Know the stages of your sales cycle and what defines each one.
- [ ] **Have a library of content.**
  Content is the key to nurturing success, and you need to have plenty created.
- [ ] **Map content to sales cycle.**
  Understand which pieces of content are best for each buyer stage.
- [ ] **Understand timing.**
  Know the length of your sales cycle and how often you can contact prospects.
- [ ] **Define your KPIs.**
  Understand and track the metrics that will indicate the success of a campaign.
- [ ] **Determine responsibilities.**
  Determine who is in charge of creating, monitoring, and updating campaigns.
- [ ] **Test, test, test.**
  You'll never get it right the first time. Be prepared to track and iterate.

Campaign Planning Checklist

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

- [ ] **Segment.**
  Segmenting your prospects will show them right away that you are focused on their particular needs, 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's important that every email you send provides value to your readers.

- [ ] **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 applicable, add links to additional content to draw prospects to your site. You can then track and record what they are searching for and what interests them.

- [ ] **Focus on your prospects.**
  The most important thing you can do to ensure the success of your lead nurturing campaign is also the most obvious: focus on the prospects' needs.

WORKSHEET FOUR

Campaign Planning, Part I

SALES CYCLE STAGES

Defining the stages of your sales cycle will help you tailor your campaigns to a buyer's journey.

AUDIENCE ROLES

Who are the major influencers in a purchasing decision? Define and understand each one.

MAPPING YOUR CONTENT

Each stage should have content that fits your audiences' needs best.

STAGE

There may be more or fewer than six.

1. ______________________
2. ______________________
3. ______________________
4. ______________________
5. ______________________
6. ______________________

AUDIENCE

There may be more or fewer than six.

1. ______________________
2. ______________________
3. ______________________
4. ______________________
5. ______________________
6. ______________________

MAP YOUR CONTENT

Choose the pieces of content that you would like to include in your nurture program.

WEEK ONE: ______________________

WEEK TWO: ______________________

WEEK THREE: ______________________

WEEK FOUR: ______________________

WEEK FIVE: ______________________

WEEK SIX: ______________________

WORKSHEET FIVE

Campaign Planning, Part II

THE CAMPAIGN

Define the steps of your nurturing campaign and how you will proceed if the prospect takes action.

TITLE:

STAGE OF THE SALES CYCLE:

TARGET AUDIENCE:

THE CAMPAIGN STEPS

Record the basics of your campaign.

ACTION:	ACTION:	ACTION:
PAUSE: DAYS	PAUSE: DAYS	PAUSE: DAYS
ACTION TAKEN? YES NO	ACTION TAKEN? YES NO	ACTION TAKEN? YES NO
FOLLOW-UP:	FOLLOW-UP:	FOLLOW-UP:

WORKSHEET SIX

The Call-to-Action Checklist

Creating the right CTA 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 as to-the-point as possible.

- [ ] **Make CTAs obvious.**
  Set your CTAs apart. They should be easy to find, so consider differentiating via color or buttons.

- [ ] **Don't be bossy.**
  Use commands, not demands. You want your CTAs to encourage an action without sounding demanding.

- [ ] **Indicate urgency.**
  Your users will be more tempted by offers they perceive to be available for a limited time only.

- [ ] **Convey value.**
  Tell users what they're going to get, not what they need to do.

- [ ] **Test, test, test.**
  Use A/B testing to decide which CTAs perform the best, then optimize accordingly.

Smarter Marketing.
Better Results.

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.

Take a Guided Tour

View a Demo