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The Complete Guide to B2B Marketing

How to optimise your campaigns and drive more revenue.

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INTRODUCTION

Be a better B2B marketer.

In early 2015, Salesforce conducted a survey of more than 2,100 global marketers to better understand the current state of B2B marketing. The results proved that B2B marketers are as time-strapped as ever, and consistently grapple with three main challenges: new business development, lead quality, and lead generation.

But that's not all that B2B marketers have on their plates. The emphasis on a more cohesive, personalised selling process is growing, leading many marketers to increase their investments in technologies that can help them create 1:1 buying experiences. Marketers now own more of the lead-to-revenue cycle than ever and are responsible for engaging with buyers throughout the entire customer lifecycle.

In an increasingly digital and data-driven world, this means more than well-timed emails and the occasional clever Tweet. Marketers need to think bigger — and this e-book can help.

The following chapters will guide B2B marketers through the eight main pillars of digital marketing, with checklists and worksheets provided at the end of each chapter.

Whether you're building a B2B marketing strategy from the ground up or you're working to perfect the strategy you already have in place, you'll find valuable insights on how to:

- build effective and measurable lead generation campaigns
- qualify and assign leads to sales — at the right time
- increase the value of your database using targeted nurturing programs
- create engaging emails that resonate with your target audience
- develop a content strategy that supports your overall business goals
- build a webinar and event marketing strategy from the ground up
- engage with your target audiences over social media in an authentic way
- report on the success of your marketing initiatives

Start your journey to becoming an even better B2B marketer. Let's dive in!

CHAPTER ONE

Be better at lead generation.

B2B marketers are facing an ever-increasing demand for more high-quality leads. In fact, according to B2B Technology Marketing Community, marketers' lead generation budgets have increased 50% since 2013, demonstrating the growing number of resources that marketers are investing in lead generation initiatives.

In the B2C world, lead generation typically starts and ends in the same place: the purchase. On the other hand, B2B marketers with long, complex sales cycles look at conversion as getting a visitor to fill out a form in exchange for something of value, such as a white paper, a product demo, or a free consultation. The purchase may be months — or even years — away. Landing pages with hosted forms are often the de facto method for these conversions, which is why optimisation is so crucial to the sales and marketing process.

According to a 2015 study by Regalix, 84% of marketing executives indicate that lead generation is the number one benefit of a marketing automation tool. The first chapter of our guide takes a look at how marketing automation features like landing pages, forms, and progressive profiling can help marketers boost the effectiveness of their lead generation programs.

CREATING EFFECTIVE LANDING PAGES

Landing pages are a key ingredient in lead generation, but building the perfect landing page isn't always easy. It requires a great deal of testing and analysing — combined with eye-catching visuals and persuasive copy — to build a landing page that will not only decrease bounce rates, but will also increase conversions and the amount of time visitors spend interacting with you.

Historically, landing pages were primarily used for basic data collection, but today their usage has evolved. Now, landing pages can be used as launch pads to drive visitors deeper into your site, directing them to more valuable content. With tools like marketing automation at your disposal, you can create landing pages, forms, copy, and calls-to-action that are optimised for that purpose: to keep your visitors engaged on your site, even after they've already converted.

So where do you begin?

Start with your value proposition. Your buyers are faced with information overload and endless options, so their time is both limited and valuable. To break through the clutter and hold their attention, your offer needs to be both compelling and persuasive. Use strong calls-to-action and benefit-focused language to convey value, and be sure to keep the focus on your buyers, not on you.

To get more information about crafting the perfect call-to-action, see the checklist at the end of this chapter.

Create points of engagement. Engagement on a landing page is a function of a few core items: sightlines (where users look on the page), copy, calls-to-action, and images.

68% of B2B businesses use landing pages to garner new sales leads for future conversion.

- MarketingSherpa

SIGHTLINES AND COPY

It's important to keep the following facts in mind when designing your landing page for optimum engagement:

- Text is almost always scanned, and not read entirely.
- Greater focus is given to words in the top and left side of the page.
- Text is scanned in what's called an f-pattern.

According to Nielsen Norman Group, before a visitor leaves, they'll read — at most — 28% of the words on a page.

If you need more than a couple of short paragraphs of text on your landing page, make sure the first words in those paragraphs give a clear indication of what they're about. If you can divide the content into sections, do so! Make sure you write concise headings to help scanning eyes find the information they're searching for.

CALLS-TO-ACTION AND IMAGES

Placing your offer behind a form is an essential part of generating leads, but it helps to include some value up front. Experiment with calls-to-action and gated versus ungated content. Try gating your main offer behind a form while still sharing an unprotected piece of content for free, like an infographic, video, or calculator.

This allows visitors to see the caliber of your content without having to give up any of their personal information first.

You can (and should) still tease the downloadable asset using images on your landing pages. A good solution for this is to provide a small image of the white paper or demo that is being offered. This gives your visitors something tangible to look forward to and a much more compelling reason to convert.

Check out our checklist at the end of this chapter to see what other elements you should include on your landing pages.

Brag about your credibility. Visitors who are not familiar with your company may be hesitant to enter their contact information, even in exchange for something of value. Including a few proof points can go a long way toward establishing some credibility with your audience. Examples you might use include:

- Client testimonials
- Client logos
- Site security badges
- Ratings from Better Business Bureau and similar organisations
- Awards and industry recognition

IMPROVE CONVERSIONS IN 8 STEPS.

According to CMO Council, almost 80% of B2B marketers aren’t satisfied with their current levels of customer conversions. Learn how to join the 20%.

GET FREE E-BOOK

BUILDING FUNCTIONAL FORMS

With landing pages, less is more. Companies that ask for more than a handful of data points in the first interaction with a visitor are encouraging form abandonment. How can marketers use forms to collect prospect information without overwhelming their buyers?

Decide what information to collect. One thing to keep in mind when it comes to forms: there is an inverse relationship between the number of form fields and the form's conversion rates. One of the biggest mistakes that marketers make is asking too many questions on their forms. A general rule of thumb is to keep it to five fields or fewer, which means that you'll need to prioritise the most important information first.

Because of the multi-touch nature of B2B sales, marketers shouldn't panic if they can't collect all of the information they want about a prospect during that first interaction. Each touch point provides an opportunity to collect more data and build up a prospect's profile over time. If you have a marketing automation tool, you can use progressive profiling to dynamically present users with new questions each time they access a form (while hiding fields that they've already completed). This lessens the burden on prospects, while still allowing you to collect the valuable information that the marketing and sales teams need to move forward.

Follow best practices. Don't just think about the number of form fields; think about how they're organised. Here are some best practices for setting up and formatting your forms:

- If you have a short list of mutually exclusive options, use a radio button instead of a dropdown menu. This helps users scan faster.
- Use checkboxes when users can select multiple values simultaneously or when giving a single option that can be toggled on and off.
- When you need a single selection, but you have more than a few options, use a dropdown menu.
- Only select a default when you are confident that the vast majority of users will select that option, and ensure it's clearly labeled.
- If your labels are beside your form fields, consider making them right-aligned for enhanced readability. If form length isn't an issue, use top-alignment for even faster form-filling.

GET READY TO LAUNCH

Once you've crafted your landing page copy, decided on your offers, and added your form, it's time to release your landing page into the wild. However, the work doesn't stop there. It's important to continually monitor your published landing page and optimise each element for greater success.

Test elements to improve conversions. The best way to measure landing page performance is to study data compiled through A/B and multivariate testing. Using a tool like marketing automation, you can test calls-to-action, offers, headlines, colors, and your teaser copy. Keep in mind that users are voting with their mouse, giving you the insight needed to decide which landing page will convert the best.

At a loss for what to test? Try a few of the following:

- **Headline:** Keep it short and compelling; the headline should describe an immediate benefit to the reader.
- **Offer:** Experiment with white papers, demos, free consultations, and other content to see what prospects view as most valuable
- **Imagery:** Try a picture of your white paper cover, a related illustration, or an image of your product
- **Form length:** If you started with a lengthy form, try removing a few required fields and see if conversions improve. (Hint: They probably will.)
- **Form fields:** Try changing titles (like using department versus job title) or experimenting with the formatting of your dropdown menus and checkboxes
- **Copy:** Change up how your text is organised (for example, using short paragraphs or bullet points)

Fine-tune your thank you content. Remember, the goal of a landing page is to continue to engage your leads and keep them on your site, even after they've already converted. Create a rich and engaging experience after they submit the form. This thank you page can include additional content like videos, case studies, and links to deeper resources on your site. Buyers will appreciate the fact that you still care enough to provide them with additional information even after they've already converted — especially if you do so in a highly targeted way.

Take a look at the following pages for worksheets and checklists that can help you get the most out of your lead generation efforts — then move onto chapter two to learn more about qualifying the leads that come in through your lead generation programs.

WORKSHEET ONE

Marketing Resources Library

Use the chart below to keep track of all of your marketing collateral, including how it's being used, the goal of each piece of content (brand awareness, product knowledge, or to support sales and help close deals), your call-to-action copy, and whether or not a landing page has been created.

CONTENT NAME	GOAL OF CONTENT	CTA COPY	LANDING PAGE CREATED?	
			YES	NO
			YES	NO
			YES	NO
			YES	NO
			YES	NO
			YES	NO
			YES	NO
			YES	NO

WORKSHEET TWO

Landing Page Planning

To keep track of all of your landing page efforts, use the worksheet below. Fill out both versions A and B if you plan to conduct an A/B test for your landing page.

VERSION A

NAME: | CTA:

IMAGE? | LANDING PAGE COPY? | AUTORESPONDER? | THANK YOU PAGE?

REQUIRED FORM FIELDS:

VERSION B

List the elements being tested and their alternative treatments.

IMAGE:

CTA:

COPY:

TESTING NOTES:

WORKSHEET THREE

The Landing Page Checklist

Use the checklist below to make sure you're not missing any steps when building your landing page.

- [ ] **Communicate your value proposition.** Your offer should be compelling, persuasive, and, most importantly, clear. Don't confuse people with multiple offers!
- [ ] **Clean up the clutter.** Landing pages should be concise, easy to navigate, and free from distractions.
- [ ] **Limit scrolling**. Scanning is common in today's world, so you want your information and offer to be easy to find. If possible, keep your offer above the fold.
- [ ] **Use your thank you page.** Use your thank you page as an opportunity to upsell or cross-sell other products, services, or content. This is a great chance to drive users deeper into your site.
- [ ] **Create your form.** Keep your forms short, using no more than four fields where possible. You may also want to set up an autoresponder that will deploy once the form is submitted.
- [ ] **Add an ungated piece of content.** In addition to your gated content, consider adding a free item like a video or infographic to drive engagement.
- [ ] **Leverage images and video.** Your users will be overwhelmed by landing pages that are too text-heavy, so make sure you add in a few images to hold their attention.
- [ ] **Add testimonials.** This will lend your landing page additional credibility while lessening the hesitation that many users feel when handing over their personal information.

WORKSHEET FOUR

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 optimise accordingly.

CHAPTER TWO

Be better at lead qualification.

Today's tracking tools and marketing technologies have revealed one thing: cramming as many leads into the sales funnel as possible and hoping for the best is no longer a viable approach to doing business.

Luckily, marketing automation uses a blended lead scoring and grading model to provide an elegant solution to lead qualification challenges. In this chapter, you'll learn the basics and benefits of scoring and grading — and get several worksheets and checklists to help you build and optimise a scoring and grading model of your own.

INTRODUCING BLENDED LEAD SCORING AND GRADING

The process of sorting through incoming leads can be an immensely time-consuming task for marketing departments. Passing on the wrong leads to sales wastes your sales reps' time — plus, it puts a strain on the sales and marketing relationship. Fortunately, marketing automation offers a solution to the lead quality disagreements that often force these two teams out of sync: blended lead scoring and grading.

When used properly together, automated lead scoring and grading can take the guesswork out of lead qualification and assignment, streamlining your sales cycle and ensuring that your leads are better qualified and properly nurtured before they ever reach the sales department.

Let's take a closer look at lead scoring and grading. In this chapter, we'll examine how they differ, how they work, and why you need both.

SCORING LEADS

A lead score, expressed as a numeric value, can tell you how interested a prospect is in your product. Leads are automatically assigned scores based on their implicit buying signals (e.g., activity on your site or their response to your online marketing), providing hard, objective data in an otherwise subjective sales process. Prospects are assigned a score when they respond to an offer and enter your database. They will continue to build on this score over time as they interact with your brand.

For marketers, a lead score means that you can quickly see the leads you have generated, prioritise them based on score, and assign those that are most likely to become opportunities to sales for follow-up. In order to ensure that leads don't get passed on to sales prematurely, you can place any leads that do not pass a certain scoring threshold on a nurturing track before assigning them to sales reps. As these leads begin to respond to nurturing efforts and their scores increase, they can be automatically assigned to sales for follow-up. (Read more about this in the next chapter.)

For your sales reps, a lead score provides a concrete indication of lead engagement before they ever pick up the phone, so your reps can feel confident that reaching out will be well worth their time. Scoring can also go a long way toward relieving tensions between sales and marketing by establishing a concrete, objective system for lead qualification.

GRADING LEADS ON EXPLICIT FACTORS

While a lead's score tells you how interested they are in your company, their grade (expressed as a letter, A-F) tells you how interested you should be. Measuring a lead's interest based on implicit buying signals only tells half of the story. What if your most active lead is just a curious intern and has no influence at all on purchase decisions?

A marketer must also measure explicit qualities before passing leads on to sales or entering them into nurturing tracks to ensure that they fit the organisation's ideal customer profile. Typical explicit parameters include:

- Company size
- Industry
- Job title
- Department
- Other custom factors that shed light on a prospect's profile

With marketing automation, marketers can set up a customisable grading system that will tell them at a glance if a lead fits their ideal prospect profile, allowing them to consider prospect fit in conjunction with their accumulated score.

PUTTING LEAD QUALIFICATION TO WORK

Despite being one of the most powerful features of marketing automation, the lead scoring and grading model is also one of the most difficult topics to talk about — simply because your ideal lead qualification model will ultimately depend on your product, industry, and buyer personas. Many marketing automation platforms provide an out-of-the-box scoring and grading model, but it's important to customise this system to meet your needs in order to reap the full benefits.

Even if you feel like you don't have enough information on your prospects yet, start with a guess and adjust your model later. Here are a few items to consider as you begin building a scoring and grading model of your own:

Get input from sales. It's important to make sure your sales team is involved in the lead scoring and grading process from the very beginning. Sit down with sales stakeholders to discuss the following questions — before your lead qualification system even gets off the ground.

- What constitutes a qualified lead?
- What prospect actions typically signal sales readiness?
- When would sales reps prefer that leads get assigned to them for follow-up? How will lead follow-up be handled?
- Can lead nurturing be used to supplement the sales process if leads are not ready to talk to sales?

Setting these expectations up front will prevent you from having to backtrack later. It can also give you valuable intel as you begin setting up your lead nurturing programs.

Identify high-value actions and pages. When it comes to lead scoring, not all prospect activities are created equal. Are certain pages — a pricing page or contact us form, for example — a better indication of intent to purchase? Assign higher point values to these pages so you can see which of your leads are taking "hand-raising" actions at a glance.

40.7% of B2B marketers do not award higher lead scores to high-value web pages.

- Spear Marketing

Start assigning leads to sales — automatically.
According to a 2015 study by Spear Marketing, 46% of B2B marketers have not set up a lead scoring threshold that will automatically alert or route leads to sales. This threshold is key because it ensures that leads are only assigned once they've met a qualification level that your sales team has agreed upon. This makes it easy for sales to prioritise incoming leads and takes the guesswork out of lead assignment for the marketing team.

Whether you're a beginner setting up your system for the first time or a marketing automation pro looking to fine-tune your scoring and grading system, the worksheets provided on the next few pages will give you a helpful foundation to start from. Then, move on to chapter three to learn more about setting up effective nurturing programs for the leads in your database that aren't yet sales-ready.

WORKSHEET ONE

Building Your Model, Part I

When it comes down to it, building a customised scoring and grading model is all about asking the right questions. Use the questions below to guide your conversation with your sales team and ensure you're collaborating effectively to establish a lead qualification system that you'll both agree upon.

Who are you selling to? SMBs, Enterprise, Healthcare, etc.	
Do these companies need to be a certain size or in a certain location?	
Who within a company is qualified to buy your product? Director, CEO, CTO, etc.	
What actions on your website indicate an interest in your product?	

WORKSHEET TWO

Building Your Model, Part II

Your scoring and grading model can (and should) always be improved upon. Once you've established a system, revisit it regularly to make sure you're effectively qualifying incoming leads and passing them off at the right moment. Set a time to sit down with your sales team and discuss the following questions:

Have you noticed an increase in the number of qualified leads since implementing the new scoring and grading model?	
Discuss your current quality of leads. Any common characteristics that can be used to further weed out unqualified or non-sales-ready leads?	
Discuss a recently closed deal. What actions indicated the lead was intending to buy and ready to talk?	

WORKSHEET THREE

Grading Worksheet, Part I

CHOOSE YOUR CATEGORIES

Choose a few categories that represent important qualities in your ideal customer profile. Prospects will be graded based on these criteria. See a few common options below, and remember to think about additional criteria that may be important for your specific product or industry.

JOB TITLE	INDUSTRY	COMPANY SIZE
DEPARTMENT	LOCATION	OTHER CRITERIA SPECIFIC TO YOUR BUSINESS

Now decide how different qualifications in each of these categories will raise or lower a prospect's grade.
For example, a job title of "Director" may add 2/3 of a letter grade, where "Manager" may only add 1/3. Just remember that if your base grade is a "D," your adjustments across all categories should add up to at least 9/3 so that it's possible for a lead to reach an "A" from the default grade.

CATEGORY 1

CRITERIA	ADJUSTMENT	VALUES
	+/- __ /3	
	+/- __ /3	
	+/- __ /3	

(Continued on next page)

WORKSHEET FOUR

Grading Worksheet, Part II

CATEGORY 2

CRITERIA	ADJUSTMENT	VALUES
	+/- __ /3	
	+/- __ /3	
	+/- __ /3	

CATEGORY 3

CRITERIA	ADJUSTMENT	VALUES
	+/- __ /3	
	+/- __ /3	
	+/- __ /3	

CATEGORY 4

CRITERIA	ADJUSTMENT	VALUES
	+/- __ /3	
	+/- __ /3	
	+/- __ /3	

WORKSHEET FIVE

Lead Scoring Guide, Part I

Looking to optimise your scoring model? After you've been using your marketing automation system for about a month, it's a good idea to go back in and conduct a quick audit to make sure you're on the right track with your scoring. Let's take a look at how you can use the data you've collected to answer some scoring FAQs.

WHAT IS A "GOOD" SCORE?

Are you passing leads over to sales at the right moment? Have you set the threshold too low or too high when it comes to automated lead assignment? A sales-ready score will vary on a case-by-case basis and ultimately should be determined by historical data. Once you've collected prospect data, go back and pull your prospect scores for a closer look at how different scores correspond with different stages of the sales cycle.

PERCENTAGE OF PROSPECTS	AVERAGE SCORE	SCORE RANGE
TOP 10%		
11-25%		
26-50%		

WORKSHEET FIVE

Lead Scoring Guide, Part II

Let's take a closer look at these top 10% of prospects. Understanding which actions indicate sales readiness is an important part of setting up an effective scoring model, and your most sales-ready prospects are a great place to start. Take a group of your most qualified prospects or a deal that's closed recently, and conduct a quick audit of their recent activities. This will give you a better idea of how heavily you should be scoring certain activities.

	ACTIVITIES OF NOTE
PROSPECT ONE	
PROSPECT TWO	
PROSPECT THREE	

CHAPTER THREE

Be better at lead nurturing.

One of the most noteworthy developments in marketing technology is lead nurturing (also referred to as "drip marketing"), which allows marketers to automatically distribute targeted marketing content to leads over time. In fact, according to Regalix, 82% of B2B marketing executives indicate that lead nurturing is their number one marketing automation objective.

With the ability to achieve one-to-one personalisation on a scalable level, many marketers are realising how pivotal lead nurturing is to a customer-centric marketing strategy. Building and sustaining meaningful (and profitable!) relationships with buyers can create a substantial revenue stream from the leads you already have in your database without adding additional work or responsibilities to your department.

Creating lead nurturing campaigns that work must start with the right processes. Depending on your level of experience, this chapter can help you lay the groundwork for successful nurturing campaigns or help you improve the processes you already have in place.

WHY LEAD NURTURING?

Effective sales and marketing is all about relationships. Both departments need to be creating and sustaining meaningful communications that focus on providing value and support. Although this is a change from the traditional sales and marketing playbooks, lead nurturing makes this important aspect of the sales process easier and more effective.

79% of marketing leads never convert into sales. Lack of lead nurturing is the most common cause of this poor performance.

- MarketingSherpa

Automation improves the lead nurturing process in a number of ways. Let's look at a few examples:

1. **It increases your reach.** Nurturing campaigns are designed to feel like one-to-one interactions between your company and a prospect, but they can be applied to hundreds of leads, allowing your marketing and sales teams to be in multiple places at once.

2. **It increases your effectiveness**. According to a recent study by Forrester Research, 74% of business buyers conduct more than half of their research online before making an offline purchase. With such a large portion of the purchase process in the hands of the buyer, you could find that leads have already chosen a competitor if you wait too long to engage with them. Nurturing allows you to stay in touch throughout a long sales cycle — and allows you to monitor your prospects' responses so you can reach out the moment they show a buying signal.

3. **It gives you more bandwidth.** In modern marketing departments, and especially at smaller companies, time and resources are precious commodities. Marketers need to do more with less, and nurturing is the perfect tool to outsource your most repetitive, time-consuming tasks.

LAY THE GROUNDWORK

Whether you are just starting to use lead nurturing or you're looking to give your strategy a tune-up, proper preparation is the key to success. It's important to have a solid grasp on your sales cycle, the key members of your target audience, the content you already have in stock, and how that content maps to the sales process. Without an understanding of these variables, you are just taking shots in the dark and hoping your campaigns will be relevant and valuable.

The planning worksheet included at the end of this chapter will walk you through the preparation process, from recording key stages in the buying cycle to mapping your content to the sales cycle.

CREATE PERFECT CAMPAIGNS

An effective nurturing campaign needs to be well-planned and highly targeted to its intended audience and their stage of the sales cycle. The content, timing, and messaging of your drip emails all need to match up to the needs and priorities of your prospects. With so many variables in flux, reporting on the success of a campaign and tweaking it to have even greater success is also crucial.

We've outlined appropriate use cases, a suggested cadence, and sample messaging to help you get started with three popular types of campaigns.

- Net new lead nurturing program
- Sales nurturing program
- Cold lead nurturing program

Additionally, the campaign worksheet included in this chapter can help you identify the key variables at each stage of a nurturing campaign, making it easy to understand how all the pieces fit together into one coherent message.

INVOLVE YOUR SALES TEAM — FROM THE START

If you're just getting ramped up with lead nurturing, start with basic campaigns and expand over time based on the results you see. This process should also start with input from your sales team.

Have a sales rep walk you through your typical buying cycle and common roadblocks they see, including:

- What questions are prospects asking as they learn about your product?
- What are the pain points prospects wish to see addressed?
- Are there certain pages on your site, or certain actions a prospect could take, that would indicate that a prospect is ready to talk? What are these actions?

Find a few resources that could be helpful for someone in the beginning stages of researching your product, write up a few short emails, and build out a simple nurturing track with minimal branching. Be sure to include calls-to-action and links that can indicate that a prospect is ready to take the next step, so that you can get prospects in front of a rep the moment they're ready to talk.

By placing colder leads on this nurturing track, you ensure that leads are more educated by the time they speak with a sales rep — and that your hard-earned marketing-sourced leads don't go to waste just because they aren't yet sales-ready.

BUILD OUT A COMPLETE NURTURING PROGRAM

As you become more comfortable creating lead nurturing campaigns, you can begin to explore more use cases. Take a look at some of the options below to see if any are compatible with your business goals. (Notice that many use cases extend beyond the sales process.)

1. **Welcome Campaign**
   Welcome emails are highly anticipated, frequently opened, and simple to automate. Keep in mind that new prospects in your database should be treated differently than the ones that have been with you for weeks or months. By turning your welcome emails into a drip campaign, you can introduce these new prospects to your company, product, or service at a comfortable pace instead of flooding them with information right off the bat.

2. **Top-of-Mind Campaign**
   The top-of-mind drip is designed to engage with your not quite sales-ready leads at regular intervals, preventing leads from forgetting about your company and getting scooped up by your competitors. This drip takes place over a longer period of time, providing sales with consistent touch points, and provides the prospect with valuable content.

3. **Re-Engagement Campaign**
   Not all of your prospects will make it through the sales process and become a closed deal. At any given time, your database will likely contain a number of leads who became inactive at some point during the sales process. Re-engagement campaigns are targeted toward these inactive leads. The goal is to encourage leads to take a "hand-raising" action that will indicate that they are ready to reenter the sales process.

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 that information from you and not 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 can help.

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: Refrain from bashing your competitors, since this can come off as distasteful.) Tailor your content to your prospects' priorities and the competitors that come up most frequently in deals with your company.

6. **Industry Expertise Drip**
   As prospects move closer to the middle and bottom of the funnel, it becomes more and more 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.

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 to pull the trigger on a purchase. 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.

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.

   Take a look at a case study of our own efforts to build an onboarding drip at Pardot.

9. **Upsell Drip**
   The upsell (or cross-sell) campaign is designed to capitalise 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.

10. **Renewal Campaign**
    The renewal drip can be a convenient way to remind your existing customers that it's 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 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, and it takes the tedium out of the process for your service reps.

Sales Enablement Drip

Lead nurturing can be a critical tool for enabling your internal sales teams. By dripping your sales team with new marketing content that they can use to help sell your product, you can position marketing as a valuable resource to sales. This includes content like data sheets, new e-books, competitive one-sheeters, and even educational videos that provide selling tips from other sales reps. However, consider making this drip opt-in for your sales team — you don't want to risk becoming a nuisance by cluttering up their already busy inboxes.

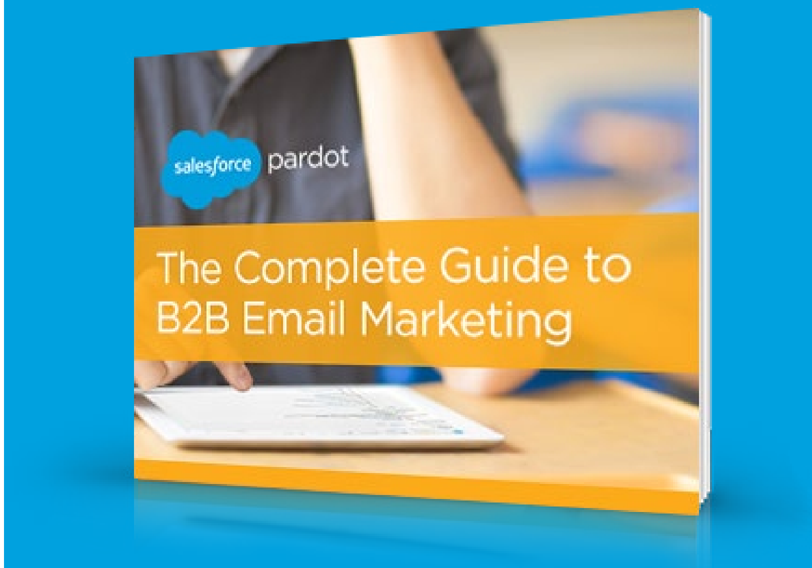
Check out this case study of our own efforts to build a sales enablement drip at Pardot.

Become a nurturing expert. As you begin to master the planning and implementation of nurturing campaigns, you can start to craft truly exceptional nurturing experiences. Just remember to stick to the following best practices.

- Segment your audience for greater personalisation.
- Present a clear value proposition to facilitate action.
- Focus your message and offer to add value for your prospects at every touchpoint.

Combining these advanced techniques with some of your own tricks will result in nurturing campaigns that not only improve the customer experience, but contribute to your bottom line as well.

The worksheets and checklists included in this chapter will help you identify the channels and strategies you need to get the most out of your nurturing programs. Skip ahead to chapter four to learn more about supplementing your lead nurturing efforts with effective email marketing.



IMPROVE EMAIL EFFICIENCY.

This e-book walks you through the entire process of creating effective, targeted emails — from planning and designing to sending and optimising — in six straightforward steps.

GET FREE E-BOOK

WORKSHEET ONE

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.

WORKSHEET TWO

Lead Nurturing 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 personalisation. Customisation 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 THREE

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 FOUR

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:

CHAPTER FOUR

Be better at email marketing.

Email marketing encompasses so much more than creating an email and hitting "send." It's about building eye-catching email templates, developing engaging email content targeted toward specific segments of your database, optimising for deliverability and responsiveness, testing, measuring, and more.

Above all, email is about connection. That's why 73% of marketers believe that email marketing is core to their business (Salesforce 2015 State of Marketing). The following chapter will walk you through the process of building a successful email program and optimising your messages for the inbox. Use the checklists and worksheets provided as you continue to refine your email strategy over time.

BUILDING EFFECTIVE EMAILS

There are a lot of questions that go along with building an email:

- Is plain text or HTML a better fit for my email?
- Where does the call-to-action go?
- What should my email subject line say?
- How will my email look on different devices?

When it comes to designing email templates for the B2B audience, it can be tough to know where to start. A B2B marketer might develop any number of emails on any particular day, from nurturing emails to autoresponders and webinar invitations. Factor in elements like images, calls-to-action, subject lines, and tracked links, and you're looking at quite a few factors that need attention before an email ever lands in a single inbox.

THE IMPORTANCE OF A GOOD TEMPLATE

One of the biggest considerations is your template. An appealing, easy-to-read email template and an eye-catching subject line can make the difference between your email being read, skimmed, or deleted.

Start by consulting the following list of questions for a few template design guidelines:

1. **Is HTML or plain text better suited for your email?** Many emails, like newsletters and event invitations, lend themselves better to HTML, while drip emails and webinar follow-ups might be more effective as simple plain text emails. Consult our full Email Design Lookbook to see examples of email templates that work for each.

2. **Does your email have an obvious call-to-action that's set apart from the rest of the content?** If your call-to-action isn't distinguished by color, placement, or text treatment, it will be hard for your readers to understand the purpose of your email. Even more importantly, it will make it that much more difficult for them to act on it.

3. **Have you broken your email content into smaller sections and used bulleted text as much as possible?** Today's buyers are pressed for time, meaning that they have a tendency to scan emails for any important points that pertain specifically to them. Use bulleted text and short paragraphs as much as possible to cater to these preferences.

4. **Are you using images when possible?** Including visuals in your emails can break up the monotony of text (especially if there's a lot of it). Just be sure to keep an eye on your image-to-text ratio; emails with far more images than text can be a red flag to spam filters.

5. **Did you include contact information, social sharing buttons, and unsubscribe links?** You'll want your email recipients to be able to share your content and/or communicate with you should they have any concerns or wish to unsubscribe.

6. **Have you spiced up your template with a few colors?** There's nothing worse than opening an email with an exciting and attention-grabbing subject line only to come face-to-face with a bland, black and white email.

7. **Is your email template clean and uncluttered?** This is perhaps one of the most important items to pay attention to when designing your email templates. Information in your emails should be as easy-to-read as possible.

8. **Is your email optimised for mobile?** Cliff Seal, Senior UX Engineer at Pardot, urges marketers to think "mobile first" with email. That means considering "tappability" (keep in mind that the typical adult finger cover 45 pixels) and using a single-column, responsive layout to ensure your design displays as intended across devices.

9. **Have you crafted an attention-grabbing subject line?** There's no secret that will guarantee you an open, but the checklist included at the end of this chapter can help you craft a subject line that will increase your open rates while still adhering to best practices.

Pay attention to how your email template addresses these questions, and don't be afraid to seek inspiration from other companies as you begin designing your emails. (Quick tip: Pinterest is a great tool for design inspiration.)

GETTING TO THE INBOX

Email marketing is at the heart of your online marketing efforts, so you want to make sure that every aspect of your strategy is optimised. No aspect of your email marketing is quite as important as deliverability — after all, even a perfectly crafted email is rendered worthless if it never reaches its mark.

When it comes to email marketing, your greatest enemy is the "Report as Spam" button. Having your emails marked as spam hurts your reputation and could result in your IP address being placed on a blacklist — bringing your email marketing efforts to a screeching halt. In fact, we recommend that you keep spam complaints under .01%, or one complaint for every thousand people emailed. Sound like a lofty goal?

Luckily, the following tips can help you optimise your email deliverability right from the start.

Start out right. If you're just getting started with a new domain name, it's important to warm up your IP address before sending high volume emails. All IP addresses start out "cold." They need to be warmed up by gradually increasing sending volume, usually over the course of two to six weeks. This is an important step in your email strategy. Sending an email to every prospect in your database right off the bat can raise some major red flags for spam monitors.

Begin by using only your best lists to build up your reputation, and try to send under 5,000 emails a day for the first week. Starting out at this rate allows you to monitor for issues that may arise from initial sends on cold IPs — without having all of your emails bounce. From here, plan out a gradual and steady ramp-up to final sending volume numbers.

Use active opt-ins or confirmed opt-ins. When it comes to obtaining permission for email communication, it's a good idea to go beyond CAN-SPAM laws — meaning a passive opt-in doesn't cut it. Whenever you're collecting information for the purpose of sending an email, include a checkbox and clearly outline what type of communication can be expected. To thoroughly cover your bases, consider using a confirmed opt-in process (also known as a double opt-in), where recipients confirm the opt-in via email after the initial form submission or contact. Confirmed opt-ins verify that email addresses are valid, keeping bounce rates low and safeguarding against spam traps being added to your permanent lists.

Make opt-outs easy and fast. Even when recipients have explicitly given permission to receive emails, they often forget that they have done so — and may turn to the spam button in a moment of frustration. Having clear and easy opt-outs is the number one way to ensure that you don't get reported as spam. You're not doing yourself any favours by continuing to send emails to people who don't want to receive them. An opt-out won't hurt your reputation, but being reported as spam will. With many marketing automation platforms, a recipient who opts out will automatically be removed from your list, but if you are not using a system that does this automatically, make sure you are regularly updating and quickly getting opt-outs off your lists.

Be clear. Be consistent. This may seem like common sense, but don't go two weeks without sending an email and then send three in one day. If possible, let your recipients known upon sign-up what you will be sending them and when — and then stick to this schedule. (Better yet, let them choose how often they receive your emails.) Not only does this make your business seem more organised and credible, it makes it far less likely that a recipient will get fed up with an inbox clogged with your emails and hit the "Report as Spam" button.

Choose your words carefully. Think of every obnoxious ad that you've ever received — and make your emails sound as least like these as possible. Phrases like "No commitment necessary!" and "For only $____!" are the best way to ensure that your email is sent straight to the spam folder. For optimal deliverability, start emails with "Hello" or "Hi" rather than "Dear."

Keep your lists clean! High bounce rates caused by invalid or misspelled email addresses can hurt your email reputation, so make sure you're regularly maintaining your lists. And if you're buying lists, stop. When you buy lists, you can easily end up sending emails to invalid email addresses, spam traps, and unsuspecting (read: unwilling) recipients — sending your odds of being reported as spam through the roof. Even if these lists aren't chock-full of invalid email (or spam trap) addresses, you're still likely to end up with a high number of spam complaints.

Watch your timing. There's no "perfect time" to send an email, but there are times that are better than others. As a general rule of thumb, avoid sending emails over the weekend or on Mondays, over major holidays or typical vacation times, first thing in the morning, or at the end of the day. The worksheet at the end of this chapter can help you find the optimal send time for your business.

Get the latest on email best practices. Learn more about email sending best practices, optimisation, and reporting in our Complete Guide to B2B Email Marketing, and get more information on deliverability best practices in the following articles:

- 21 Email Deliverability Terms You NEED to Know
- 7 and a Half Easy Ways to Improve Your Email Deliverability
- The Golden Rule of List Management
- So...What Is Blacklisting, Anyway?

WORKSHEET ONE

Email Template Checklist

There's a lot to think about when you start designing a new email template. Use this checklist to make sure you're not skipping any vital steps.

- [ ] **Decide between plain text and HTML.** Drip emails and webinar follow-ups work well as plain text, while other emails are great for HTML.
- [ ] **Break text into bullets and small paragraphs.** Make your emails easy for readers to scan at a glance.
- [ ] **Add social sharing buttons.** Allow readers to distribute your message across their networks with the click of a button.
- [ ] **Create a clean template design.** The information in your email should be uncluttered and easy read.
- [ ] **Craft your CTA.** Set your call-to-action apart using colors, a button, or text treatments so that readers will know what action is expected of them.
- [ ] **Include contact information.** In case readers have questions, include your contact info in the header or the footer.
- [ ] **Add some color.** Including a few splashes of color can really help your email stand out from the crowd.
- [ ] **Use images.** You can cut down on text if you have an image that can say the same thing.
- [ ] **Don't forget unsubscribe links.** Your emails need to be CAN-SPAM compliant, so make sure your unsubscribe links are easy to find.

WORKSHEET TWO

Subject Line Checklist

Your subject line can make or break your email — which means there's a lot at stake! Use the checklist below to help you craft the best subject line possible.

- [ ] **Use questions.** According to a study by MailChimp, email subject lines phrased as questions perform better than subject lines phrased as statements.

- [ ] **Be specific.** When recipients read your subject lines, it should be obvious what your message is and why it's relevant to them.

- [ ] **Reference location.** If you're targeting an email blast by location, add a personal touch by referencing that location in your subject line. This will make your recipients feel like your email is more relevant to them.

- [ ] **Be brief.** Try to keep your subject lines under 50 characters. Shorter subject lines tend to perform better than longer ones, and they ensure that more of your copy will be viewable in the subject line preview of an email client.

- [ ] **Include a call-to-action.** Make sure that you clearly inform readers what their next step should be. Otherwise, they may skim right over your subject line without realising that an action is required on their part.

- [ ] **Be urgent.** If your offer is only available for a limited amount of time, then your recipients will be more persuaded to act before it's too late. Just remember to choose your words carefully and avoid phrases that sound spammy.

WORKSHEET THREE

The Pre-Flight Email Checklist

Use this worksheet as a final check-through before sending off your email, both to organise your efforts and ensure that your email is optimised for content, deliverability, and rendering.

SUBJECT LINE:

LIST:

TYPE: (event, newsletter, etc.)

CTA COPY:

PLAIN TEXT OR HTML?

DOES YOUR EMAIL HAVE ALL OF THE FOLLOWING?

- [ ] BULLETED TEXT
- [ ] UNSUBSCRIBE LINKS
- [ ] CONTACT INFORMATION
- [ ] IMAGES AND COLOR
- [ ] SOCIAL SHARE BUTTONS
- [ ] SHORT PARAGRAPHS

WORKSHEET FOUR

Find Your Perfect Send Time

STEP ONE: DAY OF THE WEEK

Analyse send times and open rates from the email campaigns you've sent over the past six months and create a quick scatter plot to find the day of the week where your emails have historically seen the best open rates. Use the graph below.

STEP TWO: TIME OF DAY

Now that you've found your optimal day of the week to send emails, use this same data to find the best time of day by creating a scatter plot of open rates versus send time.

STEP THREE: SEGMENT

Now, try segmenting your lists by time of open (e.g., opened between 10:00 a.m. and 1:00 p.m. versus opened between 1:00 p.m. and 3:00 p.m.), and you'll be surprised at how easy it is to determine the best send time for each grouping.

WORKSHEET FIVE

The Email Deliverability Checklist

Sometimes, a small mistake is all it takes to send your email straight to the spam folder. Check out the common mistakes below and make sure you're not committing any of these seven deadly sins of email deliverability.

- [ ] **USING ALL CAPS.** There's no need to shout. If you're providing something of value, let your content speak for itself (and lay off the caps lock).
- [ ] **Sending to (or from) sales@, info@, or webmaster@.** This is a red flag for spam filters — and a good sign that someone is scrounging addresses off websites instead of obtaining consent from recipients.
- [ ] **Spammy greetings.** The greeting "Dear" can often trigger spam filters — thanks to the prevalence of impersonal email greetings like "Dear Energy-Conscious Business."
- [ ] **Spammy or misleading subject lines.** Any email with a toll-free number, the words "for only $__" or "click here," or a misleading subject line is at a high risk of penalisation.
- [ ] **Sending several emails in a short amount of time.** Your recipients' inboxes are full enough. They don't need three emails from you in a day. Stick to a schedule, and space communication out over time.
- [ ] **Multiple recipients with the same domain name.** This can be an honest mistake, but be aware that this is a red flag for many spam monitors.
- [ ] **Buying lists.** If you buy lists, you're highly likely to end up with a large number of invalid or spam trap email addresses — as well as a high number of spam complaints. Remember: CAN-SPAM laws dictate that people must opt in to communication from you.

WORKSHEET SIX

The Email Deliverability Checklist

Many email deliverability best practices are common sense, but it helps to have an overview to review from time to time. Use the following checklist to make sure you're continually following deliverability best practices.

- [ ] **Warm up your IP address.** If you start sending high volume emails right off the bat from a brand new domain address, you risk ending up on blacklists before you even get started. Start small and gradually ramp up your efforts.

- [ ] **Choose your words carefully.** Conduct some very simple research: go to your own spam folder and look for words that reappear often in subject lines. Familiarise yourself with these spammy terms and steer clear of them in your own emails, or run tests on your emails to help identify problem areas.

- [ ] **Use active and confirmed opt-ins.** Having clear, active opt-ins is the best way to protect your email reputation. Furthermore, confirmed opt-ins help to ensure that your recipients don't forget they subscribed and mark you as spam.

- [ ] **Be clear. Be consistent.** Make sure recipients understand what they will be receiving upon subscribing, and stick to a consistent, defined schedule. Never use misleading subject lines.

- [ ] **Make opt-outs easy.** An unsubscribe won't hurt your deliverability score, but being reported as spam will. Make your opt-outs clear, easy to find, and fast to protect your reputation.

- [ ] **Clean your lists regularly.** High bounce rates caused by invalid or misspelled email addresses can hurt your email reputation, so regularly maintain your lists to remove these.

CHAPTER FIVE

Be better at content marketing.

According to the Content Marketing Institute, content marketing is defined as "a strategic marketing approach focused on creating and distributing valuable, relevant, and consistent content to attract and retain a clearly defined audience — and, ultimately, to drive profitable customer action."

That's quite the definition, but let's be honest — it's not news to the bulk of marketers who have already had their introduction to content marketing. In fact, CMI's 2015 benchmark study revealed that 86% of B2B marketers are producing content; however, only 35% have a documented content strategy, and 17% don't have a strategy in place at all.

Considering that 60% of those with a documented strategy rate themselves highly in terms of content marketing effectiveness, this seems like a great starting point for marketers who are looking to optimise their content efforts. However, if you're still not sold on the importance of a content marketing strategy, here are a few additional ways that companies are benefiting from getting a process down on paper.

Saving time and money. Understanding how the content you create relates to your overall business goals can help you rule out projects that aren't going to be beneficial, helping to save both marketing resources and budget.

Generating new business. Per dollar spent, content marketing generates approximately three times as many leads as traditional marketing (Demand Metric). Gating content behind a form has proven to be an invaluable lead generation tactic for many businesses.

Improving the customer experience. As the B2B buyer's journey evolves, buyers will only work with companies that can provide personalised selling experiences. This applies to marketing just as much as sales — and having a content strategy to address each buyer's pain points can help meet these growing expectations.

Enabling sales. Your marketing content doesn't just help your customers. Effective content can also help your sales reps persuade a hesitant prospect or close a hard-won deal.

Educating prospects. Not every lead is ready to convert into a closed deal. Content is critical to the lead nurturing process and can help educate leads to a sales-ready state.

For B2B marketers investing in content marketing, "creating engaging content" remains the largest challenge. "Producing content consistently" and "measuring content effectiveness" are the number two and number three challenges. This chapter will walk you through the steps needed to put a complete strategy in place that can address these roadblocks and more and will provide a number of helpful worksheets and checklists to keep you on track.

PUTTING AN EFFECTIVE CONTENT STRATEGY IN PLACE

1. **Identify your goals.** The key to effective content is to make sure it meets your target customer's needs while simultaneously highlighting your company's strengths and positioning your brand as a helpful resource. Before you begin developing a content marketing plan, it's important to identify your overall business goals, map your marketing goals to those business objectives, and think critically about the key messages that will lead to more focused and effective content.

   Get started by laying out the basic components of your business, product, and target audience. Use the worksheet at the end of this chapter to organise this information and identify those important key messages.

2. **Create your buyer personas.** The average marketer targets four separate audiences with their content. One of the greatest challenges of marketing is making sure that each of these audiences is getting the right content at the right time.

   By having a concrete understanding of your ideal buyer, you can cater your content to their needs and preferences and distribute it among the appropriate channels. This ensures that your marketing messages are always relevant. To make this a little bit easier, we've created the buyer persona template at the end of this chapter to help you identify concerns and questions for each of your buyer personas — across every stage of the sales cycle.

3. **Start developing your content — with your goals in mind.** Before you dive into content creation, it's important to have an understanding of all of the options at your fingertips. The types of content you can create may seem limitless, but it's likely that some content will be better suited to your content

strategy than others. Keep in mind the goals identified during step one, along with what you know about your buyers from step two (including their channel preferences), and decide which content best aligns with your objectives.

Here are some popular types of content that might be appropriate to work into your content strategy:

- **A company blog:** A blog is a great way to position your business as a thought leader, and it can be a helpful resource for those looking for more information about your industry. Not only does this give you an SEO boost, it also helps build a community around your brand, bring in new prospects, and cultivate a following of brand evangelists.

  See the checklist at the end of this chapter for more details about optimising your content for SEO. We've also included a number of blogging worksheets and checklists to help you get a company blog off the ground. (Already heave a company blog? No problem — we've included a few blogging and optimisation tips as well.)

- **White papers and e-books:** Creating long-form pieces allows you to offer high-value content that can be gated behind a form. This gives you the opportunity to deliver a valuable resource to your audience while also collecting lead data to support your demand generation efforts.

- **Video content:** With video-hosting sites like Wistia and Vidyard, it's becoming easier than ever to collect lead data from videos and integrate it directly into your CRM. Not only is video good for lead generation, it's also a great way to connect with buyers and current clients on a more personal level.

- **Graphics, infographics, microsites, and interactive content:** Visual content has grown in popularity as the marketplace becomes more saturated with content. Buyers are looking for content that is easy to absorb and doesn't require a large time commitment to digest.

- **Case studies:** Case studies show potential buyers exactly how others are using your product or service. Since they're conducted with client approval, they carry much more weight than generic marketing content, making them an extremely valuable piece of collateral for your sales team.

- **Webinars:** If your goal is to position your company as a thought leader, educational webinars are a great way to demonstrate your knowledge of industry trends and best practices. An added bonus: they're also great for lead generation.

- **Podcasts:** The New York Times has dubbed this "The Great Podcast Renaissance." Buyers are busy, and podcasts are the perfect way for them to learn from you while multitasking.

Customer testimonials and case studies are considered the most effective content marketing tactics, identified by 89% and 88%, respectively, of B2B marketers.

- B2B Content Marketing Trends Reports

4. **Map your content to the sales cycle.** Once you have identified your different buyer personas — as well as the concerns that your personas may have at each stage — it's time to map out the content that's most appropriate for each stage of the sales cycle. Use the content mapping template included in this chapter to determine which content will be sent to each persona and when. This can help you decide which content to incorporate into lead nurturing campaigns while also helping to identify areas where more content is needed.

   A general rule of thumb is to provide more generic, topical content at the top of the funnel (think educational white papers, blog posts, and infographics) and more product-specific content toward the bottom of the funnel. Content like case studies and video testimonials are great for prospects in the middle of the funnel who are beginning to dive deeper into the different vendors that can meet their needs.

5. **Distribute!** Even if you've put in weeks of planning to develop a content strategy targeted toward your specific personas, that content will go to waste without a proper distribution plan. Remember to keep the channel preferences of your audience in mind and to leverage your networks. Take a look at the editorial calendar at the end of this chapter to get a head start on the planning process.

6. **Start measuring.** Measuring your content efforts is tricky. How do you take something qualitative like an e-book or blog post and turn it into something quantitative?

   Only 21% of B2B marketers say they are successful at tracking ROI.

   - Content Marketing Institute

   There are actually a number of KPIs that you can use to track your content depending on your goals. Metrics range from unique page visits to cost per lead and annual contract value. Take a look at this blog post for a full list of 14 different KPIs that can be used to track content success, or skip to the last chapter on reporting for a helpful KPIs checklist.

Ready to start fine-tuning your content strategy? Check out the worksheets and checklists on the following pages to make sure you're on the right track.

WORKSHEET ONE

Goal Identification Worksheet

Identify your goals by answering the questions below to make sure that your content goals are always aligned with your overall business goals.

QUESTION 1 What is your overall goal/mission statement?

QUESTION 2 Describe your target customer(s) and their basic needs.

QUESTION 3 How does your product meet these needs?

QUESTION 4 Briefly describe your company culture and some of your greatest strengths.

QUESTION 5 What sets your product apart from competitors in your field?

WORKSHEET TWO

Basic Planning Worksheet

When approaching a new content marketing initiative, use the questionnaire below to start mapping out your plan.

Describe your objective in one sentence.

Who is in charge of this initiative?

How will this objective meet your business goals?

Potential Costs:

Anticipated Total Cost:

Goal for Completion Date:

Delegation of Tasks:

Creation

Launch

Maintenance

WORKSHEET THREE

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	

WORKSHEET FOUR

Editorial Campaign Template

WEEK OF:	THEME:

DAY OF THE WEEK	CONTENT TITLE	AUTHOR	PLANS FOR PROMOTION
MONDAY			
TUESDAY			
WEDNESDAY			
THURSDAY			
FRIDAY			
SATURDAY/SUNDAY			

WORKSHEET FIVE

The Better Blogging Checklist

There are thousands of pieces of content published each day, which makes cutting through the clutter a challenge.

- [ ] **Provide takeaways.** Writing for the sake of writing just doesn't cut it. Your blog posts need to excite, inspire, and engage your audience. Provide real takeaways that a reader can put to use in all of your posts.

- [ ] **Design for readers.** The way we read content has changed. Readers no longer want to read your post from beginning to end. Provide short paragraphs, bold headings, lists, and images wherever possible.

- [ ] **Be passionate.** Passion is contagious. If you aren't excited about a blog topic, your audience won't be either. Don't be afraid to show your enthusiasm in your writing. Your readers will thank you for it.

- [ ] **Get your title right**. With so many pieces of content competing for consumers' attention, the importance of your title can't be understated. Spend some time perfecting your titles so they pique a reader's interest.

- [ ] **Do your research.** A blog post's topic may capture your readers' attention, but research and trustworthy sources will add credibility to your writing.

- [ ] **Optimise.** No matter how the marketing landscape evolves, SEO will always be a key tactic in making your content and company visible. Always take time to research and optimise for the right keywords.

WORKSHEET SIX

The Blog Promotion Checklist

Promoting your blog posts can be immensely time-consuming without a plan in place. Follow the checklist below to get your posts the visibility they deserve without sacrificing your day!

- [ ] **Share to social networks.** Post to Twitter, Facebook, Google+, LinkedIn, and your other social media accounts.
- [ ] **Submit to sites.** Use additional sites like StumbleUpon and Digg to spread your content.
- [ ] **Monitor keywords.** Set up monitoring for keywords related to your post to find other opportunities.
- [ ] **Share internally.** Your content can be just as useful within your organisation.
- [ ] **Schedule posts.** Schedule social posts over the next two weeks to hit multiple audiences.
- [ ] **Comment on relevant blogs.** Find blog posts on a similar subject and use your post to add value to the conversation.
- [ ] **Share to visual sites.** If your content has visual elements, make sure you are sharing to visual sites like Pinterest, Instagram, and Visually.
- [ ] **Monitor comments.** Keep tabs on shares and blog comments to keep the conversation going.

WORKSHEET SEVEN

The SEO for Blogging Checklist

Promoting your blog posts can be immensely time consuming without a plan in place. Follow the checklist below to get your posts the visibility they deserve without sacrificing your day!

- [ ] **Pick one to three keywords.** Keep your keyword or key phrase to three words or fewer. Keyword phrases don't always have to appear in order, but it does help your cause.
- [ ] **Create quality content.** Content creation has been ranked as the most effective SEO tactic by MarketingSherpa. Never underestimate the value of quality content.
- [ ] **Keep it short.** Keep the title of your post under 79 characters to prevent Google from cutting off your title.
- [ ] **Go deeper.** Covering topics in greater depth can help you rank higher for long-tail, specific keywords.
- [ ] **Use internal links.** Once you write an article, link to any other posts you have that are already optimised for the same keyword(s).
- [ ] **Remember to promote.** Promote repeatedly. This ensures that your content has a longer shelf-life than content that has only been promoted once.

The SEO Checklist

Ready to start optimising your content for search? Take a look at the checklist below to make sure you're not missing any important steps.

- [ ] **Use the right title tag.** Include your keyword(s) in your title tag (the text that's displayed in your browser heading).
- [ ] **Perfect the page URL.** Make sure your URL includes your keyword or key phrase as close to the beginning of the URL as possible. Remember, use hyphens — not spaces or underscores.
- [ ] **ALT tag images.** Include keywords in your image ALT tags so that search engines understand what the image is displaying.
- [ ] **Optimise file names.** Similar to your image ALT tag, you should also include your keyword(s) in your image file name to reinforce your page content.
- [ ] **Populate your page content with keywords.** Focus on where the keyword falls on the page: the closer to the beginning of your page content, the better.
- [ ] **Don't forget the metadata.** Include keyword(s) in your meta description (the descriptive sentence that search engines pull for their results page).
- [ ] **Curate quality content.** Create helpful, relevant, and high-quality content. The other steps on this checklist will be worthless if the content isn't good enough to gain you inbound links.

CHAPTER SIX

Be better at webinars and events.

Events have always been a crucial component of B2B marketing, and that certainly hasn't changed in the Internet age. In fact, Regalix reports that 91% of B2B marketers currently invest in event marketing. Instead of eclipsing traditional events, digital marketing has opened up new opportunities for marketers, such as webinars, virtual trade shows, and unique avenues for event promotion. Whether you're hosting a webinar, sponsoring a conference, or manning a booth at a trade show, the following chapter will help you make the most of your B2B marketing events.

WHY WEBINARS AND EVENTS?

According to the same study by Regalix, 96% of B2B marketers say that event marketing accelerates lead generation and grows the sales pipeline. If that's not impressive enough, consider that events and webinars are excellent avenues for showcasing your thought leadership, nurturing relationships with prospective and current customers, and enabling customers to make the most out of your products and services.

EXECUTING SUCCESSFUL WEBINARS AND EVENTS

1. **Plan your strategy.** The types of events your company invests in will differ depending on your goals. For example, a small business hoping to establish a foothold in their industry may want to operate booths at popular trade shows. A company struggling with customer training, on the other hand, may want to host a series of educational webinars. While in-person events are ideal for face-to-face, personalised interactions, webinars and virtual events give you the ability to reach a large audience right from your desk.

   More than likely, your ideal strategy will include a combination of in-person and virtual events that focus on prospecting, training, and thought leadership. Once you've determined which types of events are right for you, take a look at the planning worksheets at the end of this chapter to organise your strategy and ensure that your events go seamlessly.

2. **Promote your webinar or event.** Even the most highly organised and well-executed event will do you no good if nobody shows up. The promotion checklist at the end of this chapter will walk you through the different channels you can use to create buzz and drive attendance to your event, booth, or webinar.

3. **Deliver an exceptional experience.** Don't be just one booth among many at a trade show, or yet another webinar invitation in an inbox. Set yourself apart from your competitors and leave your audience wanting more by delivering an unforgettable experience.

- **Practice, practice, practice.** Make sure your event goes off without a hitch by running through any speeches, pitches, and slides ahead of time. If you're hosting a webinar, familiarise yourself with your webinar platform so you don't have any technical mix-ups.

- **Stand out.** If you know that your competitors usually give out t-shirts at events, why not hand out branded power banks instead? Try doing something different, such as playing a game of cornhole near your trade show booth or engaging your webinar audience with an interactive game of trivia.

- **Simplify lead tracking.** CEIR found that a shocking 59% of companies are still using paper-based lead forms and business cards to collect information from trade show attendees. This system can work, but it requires a lot of tedious, manual data entry that just isn't necessary — not to mention the fact that it can make your company look out-of-touch. Fortunately, marketing automation makes it easy to set up a landing page to collect information from leads who visit booth. You can then tie your in-person interactions with those leads to their online activities.

- **Amplify the conversation.** Live streaming and posting on social media during an event increases your reach and allows non-attendees to join in the fun. At the end of this chapter, we've provided worksheets to help you get the most out of your live posting strategy.

- **Get real-time feedback.** Your attendees' feedback is your best resource for improving your event strategy — don't miss this invaluable opportunity! Survey attendees during and after your event to see how you can improve in the future.

4. **Measure your success.** Because prospects are attached to campaigns within your marketing automation system, it's easy to attribute revenue to its source. With this insight, you can see how many event-generated leads convert to customers and use this data to calculate the ROI of your event presence. In addition, be sure to record how well you performed against the goals you set in the planning process.

5. **Follow up with your leads.** According to CEIR, 80% of businesses don't follow up with leads generated at trade shows. That's an enormous missed opportunity! It doesn't matter how many hands you shake if you're not truly connecting with anyone. Use your marketing automation platform to assign leads to your sales reps for follow-up, and begin nurturing them with relevant post-event information using drip campaigns.

6. **Extend the impact of your event.** "Events are not just a moment in time; they are content that can be used in lots of ways," says Liz Bigham, Senior Vice President and Director of Marketing for Jack Morton Worldwide. Turn your event into multiple pieces of content, like blog posts and slide decks, that will continue to generate engagement and leads for months to come.

Ready to start building buzz for your events, webinars, and other marketing campaigns? Check out the next chapter on social media to learn more about building an effective social outreach program.

WORKSHEET ONE

Live Event Planning Checklist

Hosting a live event is no small feat, but it will go much smoother if you plan all the details well in advance. Follow the checklist below to map out your strategy.

- [ ] **Choose a theme.** Will your event have a specific theme or topic?
- [ ] **Pick a date and time.** Make sure you're giving your team (and your attendees) enough time to plan for the event. Be sure to consider any competing events that may be taking place at the same time.
- [ ] **Find a location.** Be sure it fits your budget and has plenty of space. If you're hosting a multi-day conference, make sure the location is close to enough hotels to accommodate your attendees.
- [ ] **Choose the right speakers.** If necessary, select internal company speakers or hire external ones to lead workshops and give presentations.
- [ ] **Select sponsors.** How will you secure sponsors for your event, and how will sponsorships be mutually beneficial?
- [ ] **Hire the right vendors.** What kind of third-party vendors will you need for your event? Consider ticketing, event planners, your set-up and breakdown crews, food and drink vendors, swag suppliers, and other specialty vendors.
- [ ] **Aim high.** Set goals for registration, attendee satisfaction, and pipeline generated from your event.

WORKSHEET TWO

Webinar Planning

PREPARATION

Create solid groundwork for your webinar.

TOPIC: ☐ SPEAKER: ☐ DATE: ☐

MUST HAVES: ☐ LANDING PAGE ☐ FORM ☐ INVITATION EMAIL ☐ THANK YOU EMAIL ☐ REMINDER EMAIL

PROMOTION

Begin promoting 2-3 weeks before your event.

BLOG POST: ☐ INCLUDES A CTA? ☐ SENT EMAIL? ☐ SHARED TO SOCIAL? ☐ ☐ ☐

PROMOTE TO EMAIL LISTS:	PROMOTE WITHIN DRIP CAMPAIGNS:	DATES OF REMINDER EMAILS:
		(Day before webinar)
		(Day of webinar)

WORKSHEET THREE

Webinar and Events Promotion Checklist

There are dozens of promotional channels you can use to get the word out about your event or webinar. Use the following tips to explore your options and determine which ones are right for your event.

- [ ] **Create a landing page.** Set up an online hub where attendees can go to register and learn all the details they need to know about your event or webinar.
- [ ] **Issue a press release.** A big event calls for plenty of media coverage, so be sure to issue a pre-event press release.
- [ ] **Send out email invitations.** Invite clients, prospects, partners, people who attended last year, and industry influencers — just make sure to follow all CAN-SPAM regulations.
- [ ] **Go old school with direct mail.** If you really want to stand out, send personalised invitations via snail mail.
- [ ] **Advertise online.** Invest in social, search, and display advertising targeted at your audience.
- [ ] **Blog about it.** Publish a relevant blog post with a call-to-action to register for the upcoming event or webinar.
- [ ] **Create social buzz.** Select a short, memorable hashtag to promote your event, and consider generating buzz with a social media contest.
- [ ] **Advertise locally.** If you're hosting a local event, consider buying outdoor ads or local radio spots to draw in a crowd.
- [ ] **Send a reminder.** Email registrants again before your event to remind them to attend and give them any last-minute details they may need.

WORKSHEET FOUR

Live Posting Checklist

Make sure you're sticking to live posting best practices by following the advice listed below.

- [ ] **Alert your followers.** Be sure to tell your Twitter followers ahead of time to expect a high volume of Tweets so they aren't unexpectedly bombarded.
- [ ] **Hashtag and geotag.** Make sure you're reaching all attendees, including ones who aren't following you online. Include the event's hashtag in all your social posts and geotag the venue.
- [ ] **Take notes.** Keep track of any memorable quotes and moments that you don't post live so you can use them later.
- [ ] **Be visual.** Instagram and Vine are quick and easy ways to show off an event, especially if your company has an exciting booth.
- [ ] **Know where to post.** Don't overpost to Facebook, Google+, or Linkedin. It's okay to share one or two standout photos or an update promoting your company's booth, but more than that is overkill.
- [ ] **REALLY visual.** You can also use Instagram and Vine to film short clips (15 and 6 seconds, respectively) of attendees giving their best industry tips or sharing their favourite part of the event.

WORKSHEET FIVE

Live Tweeting Events

Fill out this worksheet before you attend an event so you're prepared to live-tweet the best quotes and most important moments.

EVENT SPECIFICS

EVENT NAME:		DATES:		NUMBER OF ATTENDEES:	
LOCATION:		HASHTAGS:			

SPONSORS

You don't have to know every event sponsor, but it may be helpful to jot down some of the big names.

SPONSOR:		SPONSOR:		SPONSOR:	
TWITTER HANDLE:		TWITTER HANDLE:		TWITTER HANDLE:	

SPEAKERS

If you know all about the keynotes ahead of time, you'll be able to seamlessly live-tweet their insights without scrambling to make sure you got their Twitter handles right.

SPEAKER:		SPEAKER:		SPEAKER:	
TITLE & COMPANY:		TITLE & COMPANY:		TITLE & COMPANY:	
TWITTER HANDLE:		TWITTER HANDLE:		TWITTER HANDLE:	

WORKSHEET SIX

Post-Event Checklist

Your work isn't over just because your event is. Follow these steps to wow your attendees and get the most out of your event investment.

- [ ] **Stay in touch.** Create Twitter lists of people and businesses you connected with during the event and through the event hashtag.
- [ ] **Leverage video content.** Post videos of speakers or other event highlights on YouTube, Vine, Instagram, and SlideShare. (Make sure you have permission before posting.)
- [ ] **Recap.** Recap the event highlights on your blog, and promote the post on your social media accounts.
- [ ] **Advertise.** Consider targeting attendees who tweeted the event's hashtag in your digital advertising campaigns.
- [ ] **Follow up promptly.** Send relevant materials, like the recorded webinar or slide deck, within 24 hours after the event.
- [ ] **Pass leads on to sales.** Assign event leads to your sales reps for follow-up. Note that leads who spoke to specific sales reps at a live event should be assigned to those same reps.
- [ ] **Set up drip campaigns.** Add your leads to drip programs that will nurture them with post-event information and relevant content.
- [ ] **Calculate ROI.** Use your marketing automation tool to determine how many event-generated leads were converted into customers and to calculate the ROI of your event.

Be better at social media.

A 2015 study from the Content Marketing Institute and MarketingProfs found that 92% of B2B companies are using social media — but most struggle with measuring its value for their business. Of course, there are plenty of qualitative benefits of social media. For example, it enables companies to receive instant feedback about their products and services, source content ideas, gain competitive insight, and, most importantly, show their customers they care by quickly responding to their ideas and concerns.

But how can you be sure you're making the most of social media and getting a measurable return on your investment? In this chapter, we'll give you the resources you need to build a successful social media strategy from the ground up, or to improve the strategy you already have in place.

PICK YOUR PLATFORMS

It's important to understand who your audience is and what they expect from each social media channel. CMI found that the average B2B company uses six social media platforms — but keep in mind that whichever platforms you choose to leverage, it's crucial to remain active. You're better off using a couple different channels very effectively than spreading your resources too thin across every social media platform out there.

PLAN YOUR STRATEGY

Consider your capabilities. Do you have one (or more) employees who can dedicate themselves full-time to social media? If not, how will you delegate social responsibilities? Consider your budget as well. Do you plan on investing in paid social in addition to organic posts? Would it benefit you to purchase a robust social media tool, or will free tools get the job done?

Create a schedule. Test a few different posting cadences to determine the optimal posting frequency for your audience, and make sure you're scheduling posts (through a marketing automation platform, from within the social platform itself, or using another social tool) to go out even when you're not in the office.

Source your content. Decide what kind of content you'll be posting. You'll likely want to post ungated content (like infographics and blog posts) to drive engagement as well as gated content (such as a white paper behind a form) to generate leads. It's also important to post content from other sources so you don't come across as overly promotional.

Implement social listening. Social listening is simply monitoring social media to stay up-to-date with your industry and your client base. Choose a social listening tool (like Salesforce Social Studio or TweetDeck) and set up streams of Tweets that mention specific keywords relevant to your company, your competitors, and your industry. The social listening worksheet at the end of this chapter will help you brainstorm which keywords to monitor so you can follow a steady, focused stream of conversations that matter to you.

Stay on brand. Create a documented social media policy that aligns with your branding and your content strategy to maintain a consistent online presence. An official policy gives you more control over your company's public image, and defining what is and isn't appropriate can make your employees feel more confident about social sharing.

BUILD A FOLLOWING

Your audience is already using social media; it's just a matter of connecting with them. You can do this in several different ways:

GET MORE VALUE OUT OF SOCIAL.

Learn more about social media tactics specifically for B2B businesses in our *Best Practices Guide to Social Media*.

GET FREE E-BOOK

Use your website. Link to your social media profiles in the header or footer of your website and on your Contact Us page.

Activate your employees. Ask your employees to link to your company's social profiles in their email signatures and Twitter bios, and encourage them to join the conversation! Jay Baer, President of Convince & Convert, sees employees as a valuable distribution channel for content, especially for B2B: "Employees have more engagement and trust than company channels ever do. Get your employees to participate in social media, and you'll get a powerful distribution channel in return."

Cross-post. If you already have a large following on one social network, use it as a platform to promote your other profiles. Just be sure to do this sparingly; you don't want to spam your followers with too much self-promotion.

Join communities. Join — or better yet, create — active communities on social media that your ideal buyers are likely to be part of. LinkedIn groups, Google+ communities, Facebook Groups, Pinterest group boards, and online message boards are all great places to connect with your audience. In fact, Oktopost found that 86% of social media conversions occur within social media communities rather than on company or personal profiles.

Invest in ads. The extensive data gathered by social media platforms allows marketers to run highly targeted ad campaigns that can help you grow your audience and generate leads.

Engage with influencers. By engaging industry influencers on social media, you have the opportunity to connect with their networks in addition to your own. Not sure how to identify influencers? Try monitoring relevant keywords on Twitter to see who's influential in those topics, searching Twitter lists for industry experts, or browsing topic experts on Klout.

Once you've identified your influencers, it's time to engage them. Keep the first two weeks strictly to passive engagement. Retweet them and share their content so they recognise you as a consistent follower. Then, make your pitch. Ask them to share something of yours that their followers will enjoy, and be sure to thank them when they do. Use the influencer worksheets at the end of this chapter to coordinate your strategy.

SET (AND REACH!) GOALS

Take the time to sit down and map out some social media goals so you can prove that your strategy is successful — or learn what isn't successful and work to improve it.

Determine what matters. It may be nice to know how many favourites your Tweets receive each month, but that's not a very useful metric when it comes to proving that social media is valuable for your company. While it's fine to look at vanity metrics to make sure you're on track, they aren't enough to show your CMO that social marketing is having a tangible impact. Take a look at metrics like your follower growth rate, how many leads you're generating, and levels of engagement. Need help deciding what really matters? Check out our beginner's guide to making social media measurable.

Audit your social accounts and past performance. Use an analytics tool to see how you've performed in the past. This can give you insight into which areas need improvement and help you set a benchmark for future performance.

Analyse your competitors. Take some time to peruse your competitors' social profiles. Note what they're doing well or poorly, and take a look at how their metrics compare to yours.

Set goals. Based on your past performance and your competitors' performance, it's time to set some reasonable — but still ambitious — goals for your brand. Be sure to set both short-term and long-term goals for the metrics you choose to measure.

Outline actionable steps. What steps will you take to reach your goals? Mapping out specific, actionable stepping stones to success will help you avoid the dreaded procrastination bug.

Implement change. Now that you've set your goals and outlined the steps you'll take to achieve them, it's time to put them into action.

Track your success. Use the goal tracking worksheet at the end of this chapter to track your success and prove the results of your social media efforts.

Modify your goals if necessary. Now, we're not suggesting that you drastically alter your goals so it looks like you met them when you didn't. But if you're consistently falling short, you might consider modifying your long-term goals to be more reasonable — and rethinking the steps you can take to meet them. Maybe you realise that growing your followers isn't as important as engaging the followers you already have. That's fine; just modify your goals to reflect that.

Get more specific with goal-tracking and reporting in the next chapter in our guide, which focuses on overall KPI reporting.

WORKSHEET ONE

Social Listening

A successful social media strategy is just as much about listening to relevant conversations as it is about posting content. Use this worksheet to brainstorm keywords to monitor in your social listening feeds.

COMPANY KEYWORDS

SOCIAL HANDLES & USERNAMES	PRODUCTS	NAME VARIATIONS & COMMON TYPOS	WORDS TO EXCLUDE

INDUSTRY KEYWORDS

RELEVANT HASHTAGS	REQUESTS FOR ADVICE	WORDS TO EXCLUDE

COMPETITOR KEYWORDS

COMPANY NAMES	SOCIAL HANDLES & USERNAMES	NAME VARIATIONS & COMMON TYPOS	WORDS TO EXCLUDE

WORKSHEET TWO

Influencer Tracking

salesforce pardot

INFLUENCER INFORMATION

Let's capture some basic information for your records.

NAME:

EMAIL:

TWITTER: @

WHAT DO THEY TWEET ABOUT?

HOW MANY FOLLOWERS DO THEY HAVE?

BUILD THE RELATIONSHIP

Time to start engaging. Try to share or comment on their content at least six times over two weeks.

ENGAGEMENT DATE:	RECIPROCATED?		ENGAGEMENT DATE:	RECIPROCATED?	
	YES	NO		YES	NO

ENGAGEMENT DATE:	RECIPROCATED?		ENGAGEMENT DATE:	RECIPROCATED?	
	YES	NO		YES	NO

ENGAGEMENT DATE:	RECIPROCATED?		ENGAGEMENT DATE:	RECIPROCATED?	
	YES	NO		YES	NO

WORKSHEET THREE

Pitching Influencers Checklist

After you've spent some time engaging with your influencers, it's time to make the pitch and ask them to share some of your content. Use these best practices when you make your request.

DATE:

CONTENT PITCHED:

SUCCESSFUL?

YES NO

IF YOUR PITCH WAS SUCCESSFUL, HOW WILL YOU NURTURE THE RELATIONSHIP MOVING FORWARD?

- [ ] **Personalise.** Everyone enjoys hearing their own name! Start off your message with a personal address.
- [ ] **Demonstrate value.** Use a phrase like "Thought you might be interested" to show you've tailored your link.
- [ ] **Link to your content.** Don't forget to include a link to the content you want them to share!
- [ ] **Subject line.** Your subject line should be clear and concise. Make sure it doesn't sound spammy!
- [ ] **Personalise.** Your message should sound personal and reference some of their recent posts.
- [ ] **Be concise.** Provide a simple request in order to show you've thought this contact through.
- [ ] **Have a CTA.** Don't forget to tell the influencer what you would like them to do after they read your email.
- [ ] **End on a high note.** End your message with "Would love to get your thoughts!" or simply "Thanks!" to end positively.

WORKSHEET FOUR

Social Media Goals

Use this worksheet to track your goal progress. We recommend filling out at least two versions of this worksheet: one for long-term goals and one for short-term goals.

GOAL PROGRESS				
GOAL:				
GOAL:				
GOAL:				
GOAL:				
	DATE RANGE	DATE RANGE	DATE RANGE	DATE RANGE

NOTES:

Be better at ROI reporting.

Many marketing leaders still feel like they're under the microscope when it comes to proving the worth of their entire department — and unfortunately, they probably are. You may remember the following statistic from 2012: 80% of CEOs don't trust the work done by their marketers (to put this in perspective, 90% of those same CEOs trust and value their CIOs and CFOs).

Although it's been three years since that statistic went mainstream, marketers are still having a difficult time demonstrating their ROI. In fact, Omobono conducted a recent study that found that almost half of respondents (48%) feel they lack the analytics and reporting skills to measure their return on investment.

Fortunately, with the widening adoption of closed-loop reporting systems like marketing automation, it's getting easier to track and provide the numbers that the C-suite actually cares about. This chapter will walk through a quick overview of closed-loop reporting and provide B2B marketers with a list of valuable ROI metrics to track.

THE BENEFITS OF CLOSED-LOOP REPORTING

If you have a marketing automation system with closed-loop reporting capabilities, you can solve a common issue among B2B organisations: revenue attribution. Closed-loop reporting allows you to tie closed deals back to the campaigns that originally sourced them, giving you the ability to attribute revenue to specific marketing campaigns, prioritise your marketing programs, see where your best leads are coming from, and forecast for future initiatives.

Here's how it works:

1. A prospect visits your site for the first time.
2. The prospect is assigned a unique identifying tracking cookie.
3. The anonymous visitors takes various actions on your website.
4. The activity is tracked and recorded.

5. The visitor eventually converts and provides their information, typically via a form submission.
6. The visitor's previous activity is retroactively assigned to their new lead profile.
7. When that visitor becomes a customer, the original point of contact is credited.

70% of B2B marketers cite a lack of resources to execute as the biggest obstacle to investing in analytics.

- Regalix 2015

This type of reporting makes it possible to distinguish marketing-sourced deals from sales-sourced deals, helping marketers prove their accountability to the rest of the organisation.

5 IMPORTANT ROI METRICS

Access to powerful closed-loop reporting technologies has left one question on many marketers' minds: which metrics should be prioritised to showcase success?

Start by reviewing the Better B2B Metrics chart linked to on the following page to see which vanity metrics you can trade for more meaningful ROI metrics. Then, take a look at the list below for an overview of a few metrics that the C-suite actually wants to see — and how to calculate them. Keep in mind that some of these metrics may be better suited to your business and marketing program structure than others.

For a look at more specific email and content marketing metrics, refer to the checklists at the end of this chapter.

86% of B2B marketers feel that marketing analytics are very important to the success of their marketing programs.

- Regalix 2015

1. **Your Revenue or Annual Contract Value**

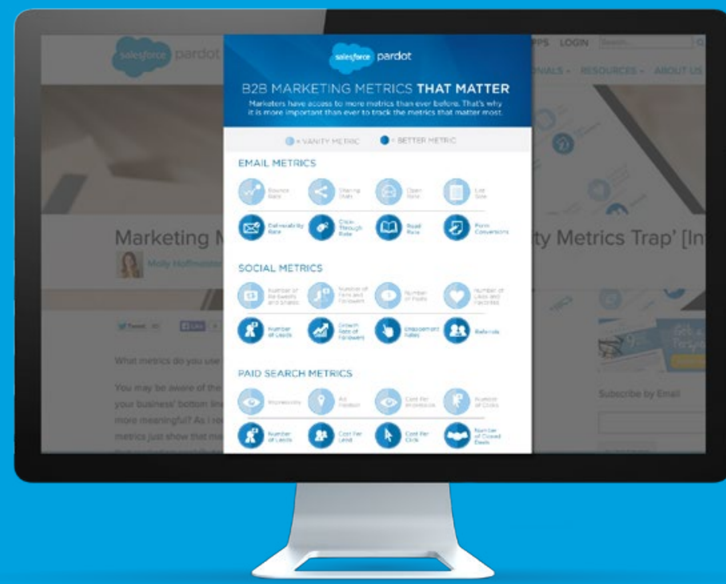
   How much in revenue or annual contract value (ACV) resulted from direct marketing sources?

   Your revenue is a great measure of how marketing is contributing to the business. To get this number, you'll want to look at the contract value or total dollar amount of all opportunities generated by marketing within a given time period. For example, for the month of January, monthly pipeline would show that marketing sourced X number of new opportunities, worth $X. Multiply this number by 12 to see the yearly amount. This dollar amount can prove to upper management that marketing is directly responsible for that amount of revenue.

2. **The Percent of Customers Directly Sourced by Marketing**

   What percentage of new customers were sourced by marketing initiatives?

   If you would rather look at things as a percentage, this metric will show what percentage of new business was sourced by marketing in a given time period. Take all of the new customers acquired in a month/quarter/



FOLLOW THE MARKETING METRICS THAT MATTER.

See some common vanity metrics (and some better alternatives) in our *Marketing Metrics That Matter* infographic.

VIEW INFOGRAPHIC

year, and see what percentage of them started as a marketing-sourced lead. This is a great indicator of how marketing is impacting overall customer acquisition.

3. **The Ratio of Pipeline to Spend**

   For every dollar spent by marketing, how much pipe was created?

   The pipeline-to-spend ratio compares the cost of each campaign to the opportunities that were sourced by that campaign. To get this metric, sum up the ACV of all of the opportunities sourced by a specific campaign and compare that number with the total spend. In order to say that the campaign was a success, you'll want at least a one-to-one ratio.

4. **Customer Acquisition Cost**

   How much does it cost you to acquire a customer?

   While you typically want all of the metrics on this list to trend upward, the same doesn't apply to your customer acquisition cost — which means this metric is definitely worth monitoring. A rise in the cost to acquire customers should be a red flag. To calculate your customer acquisition cost for a certain time period, add up all of the campaign spending, advertising costs, sales and marketing salaries (or commissions) — anything that contributes to your overall sales and marketing costs. Then, divide that by the number of new customers in that time period.

5. **The Percent of Customers Influenced by Marketing**

   What percentage of acquired customers interacted with your marketing programs?

   The percentage of customers directly sourced by marketing is a great metric to have, but some people are equally or more interested in marketing influence. The percentage of customers influenced by marketing instead looks at how many customers were touched by marketing at any point during the sales process. These leads don't need to be sourced by marketing, just influenced by a marketing program at some point during the customer acquisition process.

Each of these five metrics will give your CEO a much more accurate (and meaningful) picture of marketing performance. Take a look at the KPI calculations worksheets at the end of this chapter for help calculating these metrics, and refer to the reporting checklists on the following pages to get some ideas for additional metrics to track for your various marketing efforts. Good luck!

WORKSHEET ONE

Calculating Five KPIs, Part I

Prove to upper management that your marketing efforts are impacting the bottom line. Use this worksheet to calculate five important KPIs.

REVENUE/ANNUAL CONTRACT VALUE

How much revenue resulted from direct marketing sources?

TOTAL DOLLAR AMOUNT OF ALL OPPORTUNITIES GENERATED PER MONTH X 12 MONTHS = $

REVENUE DIRECTLY FROM DIRECT MARKETING SOURCES

PERCENT OF CUSTOMERS DIRECTLY SOURCED BY MARKETING

What percentage of new customers were sourced by marketing initiatives?

$$\frac{\text{NUMBER OF MARKETING-SOURCED CLOSED DEALS IN A (MONTH/QUARTER/YEAR)}}{\text{NUMBER OF NET NEW CUSTOMERS ACQUIRED IN A (MONTH/QUARTER/YEAR)}} = \frac{\boxed{}}{\boxed{}} = \boxed{\%}$$

PERCENT OF CUSTOMERS DIRECTLY SOURCED BY MARKETING

WORKSHEET TWO

Calculating Five KPIs, Part II

PIPELINE TO SPEND RATIO

For every dollar spent by marketing, how much pipe was created?

$$\frac{\text{REVENUE SOURCED BY CAMPAIGN}}{\text{TOTAL CAMPAIGN SPEND}} = \frac{\quad}{\quad} = \quad \%$$

CUSTOMER ACQUISITION COST

How much does it cost you to acquire a customer?

CAMPAIGN SPEND + ADVERTISING COSTS + SALARIES + COMMISSIONS + OTHER = $ MARKETING AND SALES COSTS PER (MONTH/QUARTER/YEAR)

$$\frac{\text{MARKETING AND SALES COSTS PER (MONTH/QUARTER/YEAR)}}{\text{NUMBER OF NEW CUSTOMERS PER (MONTH/QUARTER/YEAR)}} = \frac{\quad}{\quad} = \$$$

MARKETING AND SALES COSTS PER (MONTH/QUARTER/YEAR)

WORKSHEET THREE

Google AdWords KPIs Checklist

If you're company is using Google AdWords to run targeted paid search campaigns, use the checklist below to make sure you're measuring metrics beyond clicks and impressions.

- [ ] **Quality Score:** Google uses this score to determine the relevance, quality, and user satisfaction of your ads and landing pages.
- [ ] **Click-Through Rate:** The ratio of ad clicks to overall ad impressions is an indication of your ad's effectiveness.
- [ ] **Conversion Rate:** This is measured by dividing the number of leads generated by your offer by the total number of visitors.
- [ ] **Return on Ad Spend:** For every dollar spent on paid advertising, what is the return after all expenses?
- [ ] **Cost Per Lead:** This is the cost to get a qualified lead from a paid search campaign.
- [ ] **Cost Per Acquisition (CPA):** Understand how much it costs you to acquire a net new customer.
- [ ] **Total Spend:** Your total spend is the cumulative amount spend on your ads.

WORKSHEET FOUR

Content Marketing KPIs Checklist

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Turn qualitative content items like white papers and blog posts into quantitative measurements using the metrics on this list.

- [ ] **Unique Page Visit:** This is the traffic your content is receiving on a daily, weekly, or monthly basis.
- [ ] **Downloads:** The number of people downloading a piece of your content is a good indication of your content's popularity.
- [ ] **Time on Page:** This is the amount of time a visitor is spending viewing your content; time on page is a good measurement of visitor engagement.
- [ ] **Inbound Links:** This is the number of other sites linking back to your content; the greater your inbound links, the greater your credibility.
- [ ] **Shares:** This shows how often your content is being shared across networks. It is worth tracking to see which channels your content is resonating on.
- [ ] **Comments and Interactions:** Is your content sparking conversations and making an impact on your readers?
- [ ] **Cost Per Lead (CPL) and Cost Per Acquisition (CPA):** See the Pay Per Click KPIs Checklist to see how you can measure content promotions via online advertising.
- [ ] **Lead Generation:** This is the number of leads sourced by a piece of marketing content.
- [ ] **Influence:** Understand the number of leads, opportunities, or closed deals that have been "influenced" by your content
- [ ] **Conversion Rates:** Track the percentage of users that take a desired action; i.e downloading your content via a form submission.
- [ ] **Followers and/or Subscribers:** Keep an eye on the number of followers and subscribers you have on your various channels (social media, blog, etc); a good indication of brand awareness.
- [ ] **Growth:** Follow the percentage of change over time; by what percent is your subscriber base increasing? Have you seen a spike in content downloads?

WORKSHEET FIVE

Email Marketing KPIs Checklist

Go beyond email opens. Use the KPIs described below to measure the effectiveness of your email efforts.

- [ ] **Click-through Rate (CTR):** This is calculated by dividing the total number of clicks by the total number of impressions; if an email offer was delivered 100 times, but the included link was clicked only once, this would result in a 1% CTR.
- [ ] **Email Clients and Devices:** Understand which email clients, browsers, and devices your recipients are using to open your emails; use this information to optimise your emails based on your audience's preferences.
- [ ] **Glanced or Unread Percentage:** This tracks the percentage of people who did not open your email or had it open for less than two seconds.
- [ ] **Skimmed Percentage:** How many people opened your email for between two and ten seconds?
- [ ] **Read Percentage:** How many people opened your email for longer than ten seconds?
- [ ] **Forward and Print Count:** How many of your emails are being printed or forwarded?
- [ ] **Bounces:** These can be either hard (permanent) or soft (transient). In the case of a hard bounce, you likely have a bad or invalid email address that needs to be scrubbed from your lists. A soft bounce, on the other hand, may indicate that a mailbox is full or that you're sending a file that's too large.
- [ ] **Delivery Rate:** The amount of emails sent versus the amount of emails delivered is a good indication of the quality of your lists.
- [ ] **List Growth:** Is your number of email subscribers growing?

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WANT MORE INFORMATION?

Pardot is B2B marketing automation by Salesforce.

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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