

Lead Nurturing Workflows

Setting up your initial campaign

This is a sample exercise from a workshop conducted by one of the community of businesses using HubSpot (HubSpot User Group)

Exercise

1. Select the content offer you will use to trigger this Workflow (Ebook, whitepaper, kit, Webinar, free sample, etc?)

Content offer name: _____

2. What persona(s)/target market will you be focusing on

3. What is the goal of your campaign (i.e. request a demo, assessment, donation, talk to an expert). Must be associated something behind a landing page so it can be tracked.

Log into HubSpot and go to Contacts > Lists. Click Create new list

4. Create your smart list that will be used for entering people into the Workflow. Use the form required to get the content from step 1 above + any additional property fields of your choice

Name of list: _____

5. Create your smart list that will be used to track how many people have met the goal of your campaign that you chose in step 3

Name of Goal List: _____

6. Create static list named "Completed [xyz] Workflow not goal" and save. No criteria necessary

Name of Static List: _____

In HubSpot go to Content > Email. Click Create new email

7. Write email 1: [] (see initial lead nurturing campaign guide for how to write this email)
8. Write email 2: [] (see initial lead nurturing campaign guide for how to write this email)
9. Write email 3: [] (see initial lead nurturing campaign guide for how to write this email)
10. Write email 4: [] (see initial lead nurturing campaign guide for how to write this email)
11. Write email 5: [] (see initial lead nurturing campaign guide for how to write this email)

In HubSpot go to Contacts > Workflows. Click Create new Workflow

12. "When activated this workflow will enroll" **SELECT:** New contacts in list, then select the list you created in step 4.

13. "Unenroll contacts from this Workflw when contact meets the criteria of" **SELECT:** the goal list you created in step 5

14. Under "First workflow step **SELECT** "send email" and select email number 1 that you created in step 7. Set email timing to 2 or 3 days

15. Repeat step 14 four more times by clicking "add step"

16. Add step – **SELECT** "add/remove from list" then to the right **SELECT** the static list create in step 6

17. Review settings and activate

EMAIL 1:

The purpose of email one is to establish relevancy and build trust with the lead. The email should recap why you are reaching out to them and provide useful content (blogs, links, and premium content)

Subject line [make sure to include the topic which has resulted in the Workflow] If the reason why someone is entered into this workflow is because they downloaded “The ultimate guide to xyz” be sure to incorporate xyz into the subject line.

Example: 3 more reason why xyz will help you ...

[Personalization token],

Example: [First Name]

First sentence/paragraph: should be focused on establishing relevancy as to why they are receiving the email in the first place. Bluntly mention why they are receiving the email and link directly to the resource that triggered this Workflow (if there is one). Email best practices suggest using the topic of the subject line “xyz” in the first sentence.

Basic Example (recap): We hope you enjoyed the The ultimate guide to xyz.

Intermediate Example (assumptive): We hope you found the The ultimate guide to xyz helpful in your search for identifying how to [insert problem or solution that your product or service addresses/solves]

Second Sentence/new paragraph: this sentence should focus on communicating what you know about the lead that is relevant to them solving their problem or identifying an opportunity. Depending on the information you have asked up until this point you may be using [job title, industry, or a custom property specific you’re your organization].

Basic Example (if you only have first, last, email): We/I have pulled together a few of our most read blogs on topic xyz for your reading pleasure. If you found “The ultimate guide to xyz” helpful then I think you will enjoy these quick educational reads.

Intermediate Example: As the [insert job title, industry or a customer property], you know all too well the importance of [solving/keeping ahead] of the competition when it comes to [insert problem to be solved or solution that your product or service addresses]. Here are a few additional articles you may find helpful for identifying/making a smart strategic decision.

Blog article links,

Simple signature,

Post Scripts are very powerful, use your P.S. as a very soft suggestion to complete goal of the campaign.

Example: P.S. If you have some specific questions our blogs do not address, feel free to schedule 30 minutes at your convenience to chat with one of our experts.

EMAIL 2:

Now that we have established relevancy in email 1 and provided some great resources, it's time to provide the lead with another premium offer. In this email we want to explicitly connect the topic of xyz to the benefits your solution provides. This could be in the form of a premium content download, webinar, case study, etc. You are not selling them here, rather allowing them to consume your resources. Whatever you link to, link to it twice with different anchor text.

Subject line: [make sure to include the topic which has resulted in the Workflow] + If possible add in what your product/service/organization solves for.

Example: Learn how to Increase/decrease your bottom line by using xyz

[Personalization token],

First sentence/paragraph: Here we want to make it clear that others in the industry, and maybe even they know the benefits to xyz to solving their problem or meeting their need.

Basic Example (stat): According to Forrester research 85% of firms struggle from not enough [whatever your solution can help with].

Intermediate Example (Assumptive): By now it is most likely clear how and why so many companies are benefiting from xyz [insert high level solution/service you provide. [Insert tactic] (Educational content) is critical for (whatever they are trying to solve).

Second Sentence/Paragraph is where we explicitly suggest they download the piece of content, give a reason why and link to it.

Basic example: Spend 5 minutes reviewing this case study which highlights how xyz will help [insert problem/what they are trying to solve].

Intermediate Example: We put together this "5 mistakes to avoid when hiring an online/Inbound Marketing agency" ebook to help you avoid the common pitfalls when selecting the right agency for your Inbound Marketing initiative.

Third sentence/paragraph is the link to the premium content offer (use a CTA when possible)

Example: Click here to download the case study

Example: Click here to download the eBook

Signature,

Post Script: Here we want to address that we have someone who can answer and questions that may arise specific to their needs

Example: P.S. If any questions arise when reading [insert premium content offer name] schedule a few minutes to chat with one of our In house experts to discover in xyz will help solve your problem or need.

Email 3:

By this point your lead has received two emails, both with a focus on educational/beneficial content on how the initial topic they were interested in can help them with a business problem or opportunity. Now is the time that we position your goal of the Workflow as the next logical step for the lead to take. Position this step as still part of their discovery process focused on them learning/understanding how topic xyz will help them.

Subject line: [at this point you want your subject line to connect xyz with what your organization can help the lead with]

Example: Create a customized xyz plan with our experts (complementary)!

[Personalization token],

First sentence/paragraph: here is where we want to recap some of the resources we have already sent & or position ourselves as experts based on some information we can share.

Basic Example: Over the past week we have sent you some resources regarding xyz and how it can help you achieve (goal/solve problem).

Intermediate Example: It's natural to have some questions and concerns when thinking through a decision such as [enter industry name (not brand name) of your solution]. We here at [company name] work with and have provided unbiased recommendations for correctly implementing [industry name for solution] to over Xamount of companies/organizations.

Second sentence/Paragraph: Here is where we position our goal of the Workflow, focused on the lead getting value

Basic Example: We would like to extend an invite to a personal consultation with one of our experts.

Intermediate Example: Schedule 30 minutes to discuss with one of our [xyz] experts how you can be most successful applying [xyz] within your organization.

Third sentence/paragraph is the link to the goal landing page (use a CTA when possible)

Example: Request complementary personal consultation

Signature,

Stay away from P.S. to keep the focus on your goal offer

Email 4:

Here we want to explicitly call out how your product or service will help them with xyz to achieve their goal/solve their problem.

Subject line: [Focus this subject line on the landing p

Example: Your success with xyz is our goal. Here to help

[Personalization token],

First sentence/paragraph: the first sentence should connect xyz to the goal they are trying to achieve /problem they are trying to solve with how your solution can help.

Basic Example: If you have decided that xyz will be part of your strategy to [insert goal to accomplish or problem to solve"] we would love to discuss our approach to xyz with you.

Intermediate Example: It is not a matter of *if* but rather *how* and *when* and who to work with to [insert goal to accomplish or problem to solve"]. We would welcome the opportunity to discuss with you our approach to reaching/solving [insert goal to accomplish or problem to solve"] using our [product or service]

Second sentence/paragraph: Use this sentence (potentially incorporate bullet points) to communicate what they will get if they setup some time with you. Relay on the landing page you will be linking the leads to, to reinforce the benefits of requesting some time.

Basic Example: Setup some time to chat with one of our team members, and learn how we approach xyz using our [insert solution]

Intermediate example: Work with one of our xyz experts to discuss how you can benefit from xyz. Our expert will take the time to understand your unique situation and explain how our approach to xyz may or may not work.

Third sentence/paragraph is the 2nd link to the goal landing page (consultation, demo, etc) (use a CTA when possible)

Example: Request 30 minutes

Example: Request a customized demo

Example: Spend 30 minutes with an expert

Signature,

Stay away from P.S. to keep the focus on your goal offer

Email 5:

This is the break-up email where we make it clear this is the last email they will be receiving in conjunction with xyz topic. Here our goal is to simply get them to subscribe to our blog or newsletter, with a last ditch effort to chat with an expert in the P.S.

Subject line: [at this point the lead has not taken an action, so we want to wish them good luck with the original xyz topic]

Example: Best of luck with your xyz

[Personalization token],

First sentence/Paragraph: Here is where we want to pull in similar text to what we used for the first email, coming full circle.

Basic Example: We hope you enjoyed/found helpful the resources we have sent along to you over the past few weeks in your search for understanding the role xyz should play at [insert company name].

Intermediate (time pressure): Hopefully your quest for understanding if your company can benefit from for xyz is drawing to a close. We hope you have found the information we provided over the past weeks helpful and you are well on your way to making a decision as to the best solution for you.

Second sentence/paragraph: This is where we suggest they subscribe to your blog or newsletter to stay up to date with xyz and other trends within the industry.

Basic Example: Stay up to date with industry trends, get tips & weekly info, subscribe to our newsletter

Intermediate Example: As you are well aware by now, [insert industry] is changing and evolving at a rate never seen before. Signup for our blog to stay up to date on industry trends, new techniques, the weekly info.

Third sentence/paragraph is the 2nd link to the blog or newsletter subscription landing page (use a CTA when possible)

Example: Subscribe to our blog

Example: Subscribe to our newsletter

Signature,

Post Script: Here is our last chance in this campaign for the lead to accomplish the goal we set out accomplish.

Example:

P.S. If you have any questions, feel free to setup some time to chat with one of our experts, we are always here to help