THE ULTIMATE GUIDE TO

EMAIL MARKETING AUTOMATION & HUBSPOT WORKFLOWS

STEP-BY-STEP INSTRUCTIONS TO TAKE YOUR LEAD NURTURING CAMPAIGNS TO THE NEXT LEVEL

SmartBug MEDIA

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The Ultimate Guide to Mastering Email Marketing Automation & HubSpot Workflows

Step-by-Step Instructions to Take Your Lead Nurturing Campaigns to the Next Level

Introduction:

Lead conversion is a critical component to measuring success for all businesses. Marketers are measured on it, and a small business's life depends on it, yet many have trouble creating effective lead nurturing campaigns. The biggest problem is being stuck in a "one-off" email software program. How many times have you sat in front of your computer and sent an email to your leads either one by one—copying and pasting the same text over and over—or adding yourself to the "To" field and the rest of your leads to the "Bcc" field? You're not alone. The good news is that email marketing has come a long way in the last few years, starting with email marketing automation. This software has been instrumental in taking a great deal of stress off of marketers and business owners by allowing you to set up "rules" for the email tool to follow. For example, you may set up an automated email campaign such as this: "If a visitor to my website fills out X form, send them Y email."

While the function itself is simple, the amount of time saved is huge for marketers and business owners. According to Nuclear Research, companies should expect to achieve an increase in marketing staff productivity between 1.5 and 6.9 percent and increase sales productivity by an average of 4 percent just from using marketing automation! How cool is that?

Like most technologies, email marketing automation is evolving into something even more important. Companies such as HubSpot have noticed that while email marketing automation is efficient, it is not always personal. So, HubSpot set out to create the best email marketing automation tool on the planet: Workflows.

In this guide, you will learn what Workflows is, how to use it, and why it's changing email marketing automation for the better. You will also learn how to easily manage your leads database and create stellar lead nurturing campaigns through the best practices of effective email copy, analytical reporting, and knowledge of how to tweak your campaigns to get the most of out your efforts.

Chapter 1: What is Marketing Automation?

Marketing automation is a software tool that is designed to improve efficiency for organizations, particularly in marketing departments, by allowing the user to specify criteria and outcomes for specific tasks that are then interpreted and executed upon by the program. Marketing automation typically refers to email marketing but can also be used for other tools such as analytics. However, most marketing automation tools rely exclusively on email marketing.

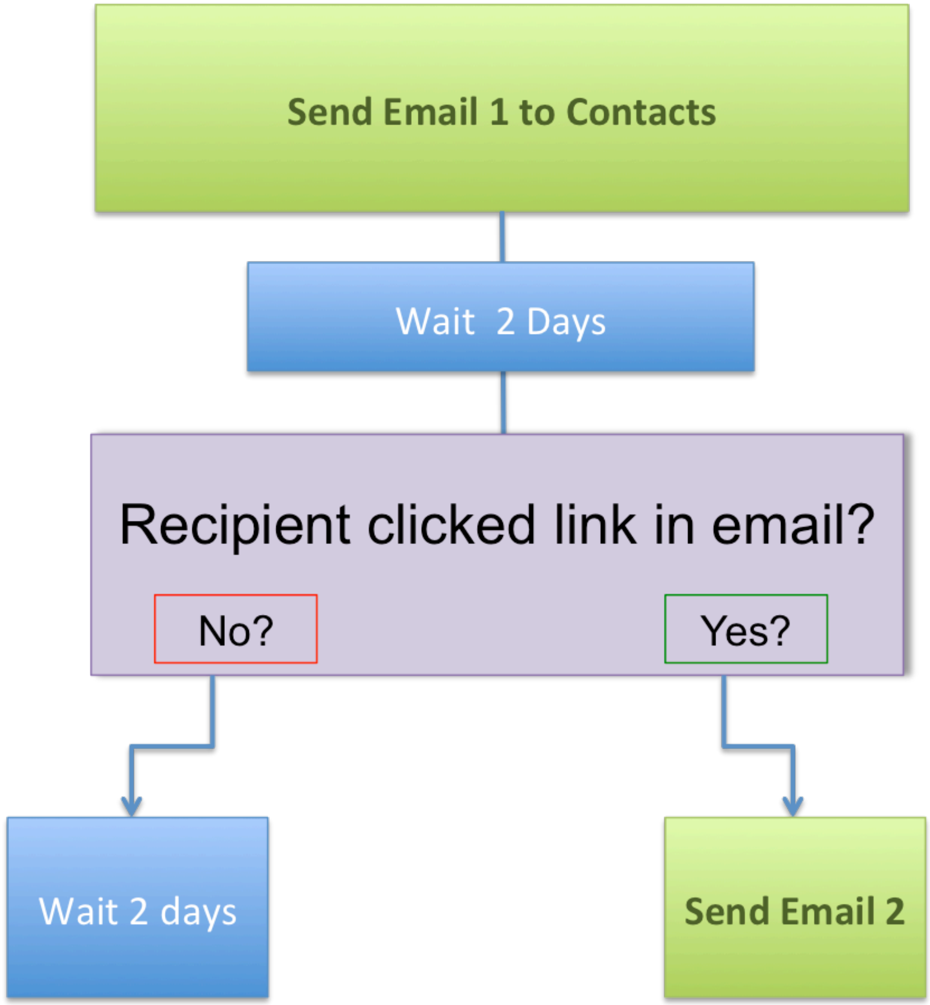
Typically, you can expect to achieve three things with traditional marketing automation: a more productive marketing and sales team, a more defined and specific sales cycle, and higher revenue overall.

How Does Marketing Automation Work?

Marketing automation tools, such as HubSpot, can do many different things, but because most of these tools focus exclusively on email, we'll use that as the example for this book.

The way email marketing automation works is a series of emails is automatically sent out to your leads based on the leads' actions in previous emails or from a static contact information list. This triggers another action to occur based on a person's behaviors or contact information, and so it goes on and on as long as you tell it to do so or the receiver of the email requests to unsubscribe. Email marketing automation improves your lead nurturing campaigns by focusing on tailoring each communication according to the lead's actions. Instead of 3,000 leads getting the same email, each email can be targeted to the individual on the receiving end. Email marketing automation makes everything a little more personal and much less spammy.

The basic email marketing automation concept is based on a branching logic varying in degrees of complexity that looks something like this:



Let's put this into perspective: Say you're searching online for lawn care in your hometown. You stumble across a white paper on how to choose a lawn care company, you download it, and you receive an email from Joe's Lawn Care. When Joe's Lawn Care sends you that initial email, you have an option to open it or not. If you open it, Joe's Lawn Care will put you in a bucket of leads to "nurture". They assume you're interested and will trigger another automated email promotion. If you click the next email, Joe's Lawn Care will assume you're much more interested than the person who didn't even open the first email and will most likely send you an email about a free consultation with a lawn care expert. If you choose to ignore the free trial but click on a secondary offer in the email (such as an ebook about the best grass for your environment), you will get another series of emails similar to the first email chain with the intent to get you to request a consultation with a lawn care expert. This approach is flawed for several reasons.

The Problem with Email Marketing Automation Today

The problem with email marketing automation today is that none of these chains of emails has the intent to *learn more about you*. Unless you're a glutton for marketing emails, a daisy chain of offers is unlikely to appeal to you. Instead of relying on email marketing automation as a tool for effortless email communication, you should challenge yourself to become more customer-focused. Why spend hours building a complex logic tree if you're not focusing on the person at the receiving end of the emails? Marketing is about relating to our personas and following their habits beyond a click or two in an email campaign.

Three Ways to Improve Your Email Marketing Automation Strategy

Now that you know that you should be focused on the customer's needs, rather than your own, how exactly will you achieve that? With a little research and team collaboration, you'll be creating relatable campaigns in no time. Here are three simple things you can do to improve your email marketing automation:

1. **Build customer personas:** You should have a solid of understanding of who your best customers are, what triggers their interests, and how they measure success. A role at a company is not sufficient. Understanding the ins and outs of your target personas will make personalizing content for them much easier. If you're not sure how to do this, read our **free personas ebook** to learn how.

2. **Understand your sales cycle:** Get with your sales team today and talk to them about the buying process of leads and customers. What kinds of questions are they asking the sales team? What is the pain point identified most often? Is it a long or short cycle? Once you have this information, conduct a content audit and make sure the offers answer the questions

your leads are asking. Then, analyze what content your contacts are downloading most often and decide what they *need* next. If you know the questions your leads are going to ask, you can be proactive and answer their queries rather than hoping they see value in a free consultation after the 35th email sent out to them. By understanding the sales cycle, you take the work off of your contact and build trust for your company's sales team.

3. **Engage and personalize each email communication:** A problem with email marketing automation strategy is that it only focuses on a small piece of the puzzle: self-promotion. If you personalize each to the stage of the sales cycle your lead is in, what the behavior is like on your website and the needs of each persona, you'll see success.

Chapter 2: How HubSpot Is Changing Email Marketing Automation with Workflows

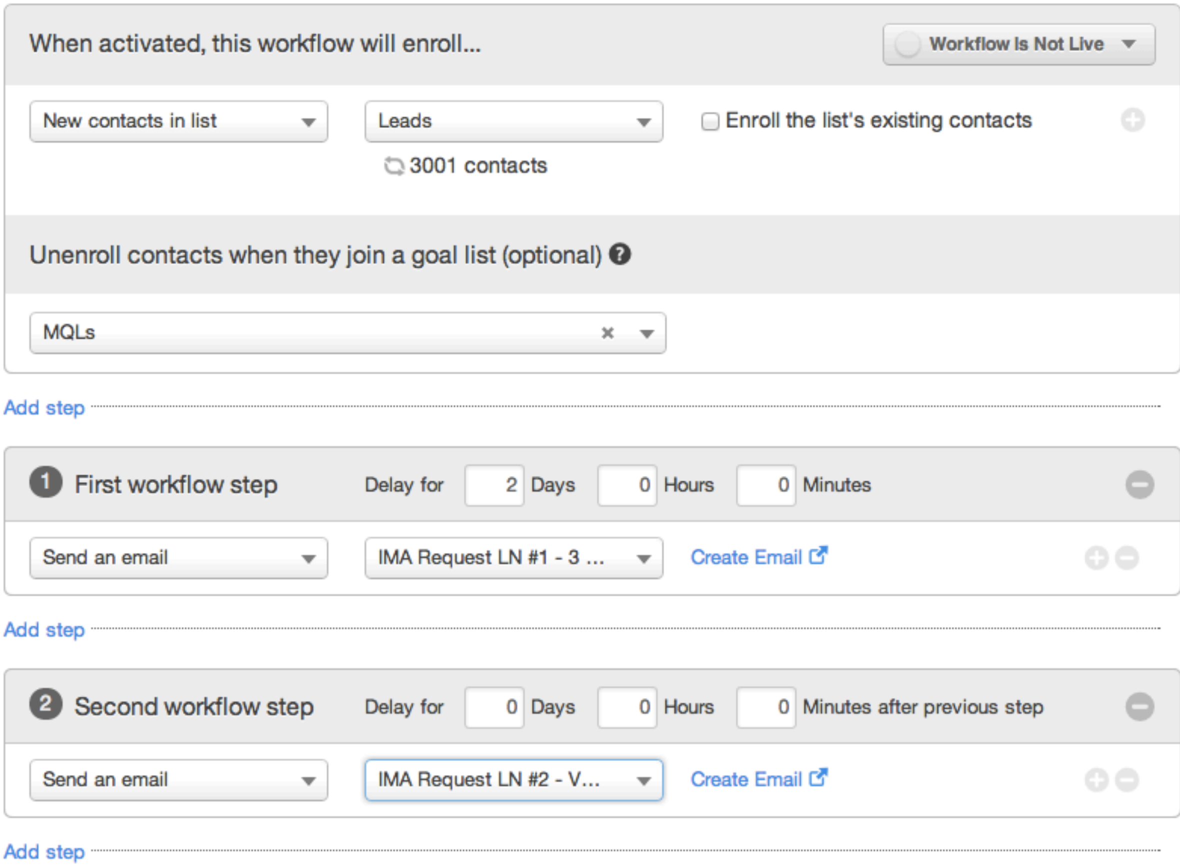
HubSpot's newest piece of genius is Workflows. Instead of focusing on static contact information and clicks or no-clicks in previous emails, you can control when a lead moves through your workflows based on up-to-the-minute contact properties including what pages that leads have seen on your website and how many times they've looked at, for example, the pricing page. This tool takes lead nurturing to the next level, allowing you to not only send customized emails, but also manage your lead database accordingly. With Workflows, you can update contact information, add or remove contacts from lists, and trigger internal email notifications to your sales team. The goal is to keep your leads engaged with content that speaks to them based on how they interact with your website as a whole and not just previous emails and contact information. Workflows accomplishes this.

What Is a Workflow?

Workflows is a tool that allows you to nurture your leads through email campaigns, manage your entire contact database, and communicate with your sales team more effectively and quicker than traditional methods.

For lead nurturing specifically, HubSpot designed Workflows to be centered on the goals you set in place for your leads rather than clicks in emails. Through other information collected on your leads in HubSpot, you can create lists of leads that you would like to nurture. When you set up a workflow, your leads are able exit it once the lead meets your desired goal—such as achieving a desired lead score or visiting a pricing page X number of times—whether or not that action took place inside the workflow, thus ensuring that your leads only receive emails that are important to them and nothing else.

A typical email workflow looks like this:



In this example, a list of leads is being nurtured and will be removed from the nurture campaign as soon as they become marketing qualified leads (MQLs). Workflows knows when a lead becomes an MQL based on the rules we set up with the List tool. In short, if you're in the leads list, you will get nurtured until you're in the MQL list. You can design a workflow with any triggers or goals you like based on what you have set up with the List tool.

QUICK TIP: The Workflow tool is integrated with Lists in HubSpot. As mentioned already, you can create rules within the List tool that allow you to nurture leads based on specific criteria. What you may not know is that HubSpot has created "Smart Lists" that automatically update with new leads as soon as they enter your contact database. That means no more updating static lists manually. Woo-hoo!

How Is Workflows Different from Traditional Email Marketing Automation?

Remember, the typical goal with email marketing automation is either the lead opening the email or clicking within the email. With Workflows, you can go further. For example, if a lead opens, clicks, and visits the pricing page on your website, do you want him or her put into a list that will trigger a new workflow in which a sales rep is notified? Probably. What you don't want, in this specific case, is leads getting the next email in your campaign that is a step behind where they are in the buying process. Through customization and goal lists, Workflows allows you to keep up with your leads at their lifecycle stage and enables you to get closer to the customer. You are no longer a figurehead on a billboard to your leads; you are their friend, the person who knows what they need most and when they need it, and you give it to them without them having to ask.

Workflows can also do a multitude of other things, including:

- Nurturing leads that filled out a specific form on a specific page
- Nurturing different lists of leads in the same workflow at the same time
- Managing your contact database by setting or copying a contact property, or increasing a numeric contact property when a lead enters the workflow
- Helping you organize your leads by adding them or removing them from lists when they enter a workflow (this is not the same as a goal list)
- Updating your sales team as soon as a lead enters a workflow by sending an internal email to the appropriate person

Obviously, Workflows is more than a lead nurturing tool. It's a lead nurturing, contact management, and sales notification tool. How cool is that?

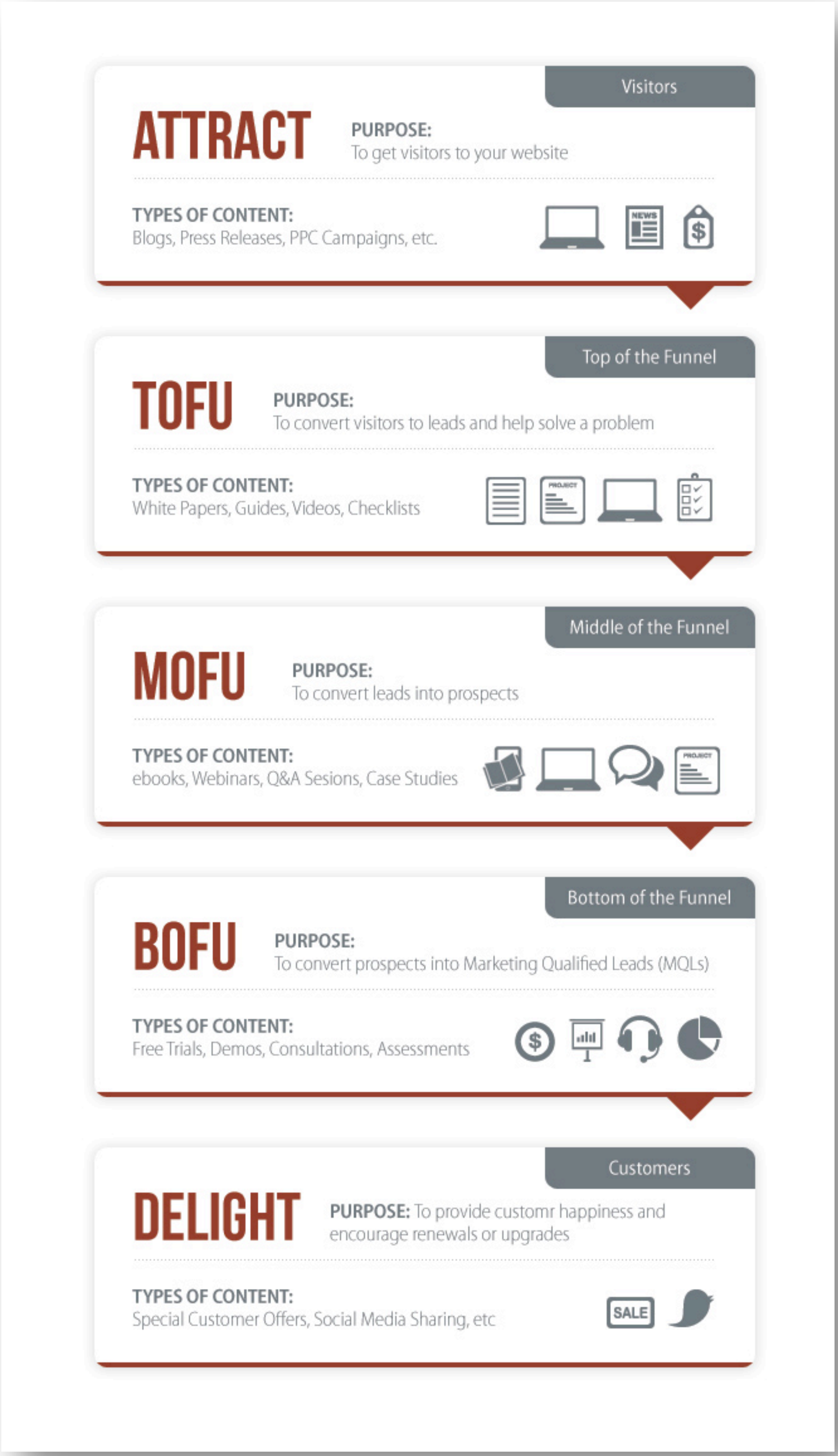
Chapter 3: Creating Awesome and Effective Lead Nurturing Workflows

By now, you have a solid understanding of what lead nurturing and email marketing automation should and shouldn't be and are ready to get started. To help you get going, here are nine steps for creating awesome and effective lead nurturing workflows:

Step 1: Have a solid understanding of your sales cycle

As mentioned in Chapter 1, understanding your company's sales cycle and how your target persona moves through it is imperative. Typically, the sales cycle can be boiled down into five stages:

- **Attract –** Your lead has a problem; they search for a solution but isn't quite sure what they're looking for yet. You come up in the search engine thanks to your great blogging skills.
- **Top of the Funnel (TOFU)** – Leads land on your website and through TOFU content marketing (like white papers) have found a solution to their problem.
- **Middle of the Funnel (MOFU)**– Now that your lead knows what he or she needs, they begin to struggle with which company suits their needs best. You can encourage your lead to pick you through MOFU offers.
- **Bottom of the Funnel (BOFU)** – Ok, your lead has decided you're the best fit, but now needs to know why they should buy from you today. You can answer this question with BOFU marketing offers.
- **Delight -** Your lead converted into a paying customer! Now you have to keep him or her engaged with special offers, social media shares, and great customer service so when it's time to renew, it's obvious they should.


Visitors
ATTRACT
PURPOSE:
To get visitors to your website
TYPES OF CONTENT:
Blogs, Press Releases, PPC Campaigns, etc.
Top of the Funnel
TOFU
PURPOSE:
To convert visitors to leads and help solve a problem
TYPES OF CONTENT:
White Papers, Guides, Videos, Checklists
Middle of the Funnel
MOFU
PURPOSE:
To convert leads into prospects
TYPES OF CONTENT:
ebooks, Webinars, Q&A Sesions, Case Studies
Bottom of the Funnel
BOFU
PURPOSE:
To convert prospects into Marketing Qualified Leads (MQLs)
TYPES OF CONTENT:
Free Trials, Demos, Consultations, Assessments
Customers
DELIGHT
PURPOSE: To provide customr happiness and encourage renewals or upgrades
TYPES OF CONTENT:
Special Customer Offers, Social Media Sharing, etc
SALE

If you're having trouble getting started, here are a few questions you can ask your sales team:

1. How do you qualify your leads and prospects?
2. What qualifies as a bad lead? Characteristics?
3. What qualifies as a great lead? Characteristics?
4. What are the top five questions you are asked during the sales process?
5. How does a lead decide to go with a competitor over us?
6. How long is the typical sales cycle?

These questions will at least get the conversation going and will help you to inform future content. The goal of the conversation is to understand how your leads think so that you don't send them offers such as free trials too soon in the process.

Step 2: Decide which persona you're targeting

First things first: If you haven't developed your company's buyer personas, do so right now! You can't tailor any of your marketing without them, so get that done straight away. To help you get started, reflect on what your sales team said about the great leads. Take the characteristics they gave and segment them into different personality types. Name them. To go further into this, conduct more research and interview your current customers. You can see an **entire list of questions with instructions here**.

Once your personas are created, decide who you will be targeting with each of your campaigns. John is different from Mary. Mary is different from John. Their emails should be targeted accordingly.

Step 3: Set goals for the campaign

One of the biggest mistakes marketers and business owners make is goal setting for their lead nurturing campaigns. Most say, "The goal is a free consultation."

OK, that's great, but if you're being honest with yourself, that's really only one lead nurturing campaign that you'll be creating. Get specific! Make sure you're setting reasonable goals based on the sales cycle.

Typical campaign goals include:

- Build trust and thought leadership with people in the early stages of the sales cycle.
- Move leads in the Awareness stage to the Consideration stage.
- Move leads in the Consideration stage to the Purchase stage.
- Re-engage leads that fell to the wayside or were unqualified at an earlier date.

If you're having trouble setting goals, just remember to make SMART goals: Specific, Measurable, Attainable, Realistic, Timely goals.

Step 4: Map your content

When mapping your content, ask yourself these questions:

- What logical pathways do your leads take from attract to awareness to consideration to purchase?
- What content pieces can you use along those pathways to encourage leads to move from one stage to the next?
- What pieces of content are you missing?
- How must you adjust the message in each piece of content to target the persona to whom you're speaking?

You can answer these questions by breaking them down into two simple matrices:

1. **The content audit:** This is a great exercise even outside of lead nurturing campaigns. Segment a matrix by the sales cycle, time spent in stage of

the cycle, persona, content you have for each stage, and content you need to create for each.

2. **The lead nurturing campaign map:** This is a much simpler map and can be created by segmenting each email, the stage of the sales cycle it represents, the content offer, CTA and landing page included in the email, and the goal of the email.

If you don't have these set up already, you can access a template of the Content Audit and ***Lead Nurturing Campaign Map Workbook here****.*

Step 5: Write emails using best practices

When you start writing your email within the campaign, think about your goals. What purpose does each email serve to your lead or customer? Refer back to the Lead Nurturing Campaign Map Workbook if you're not sure.

Some best practices to keep in mind when writing emails include:

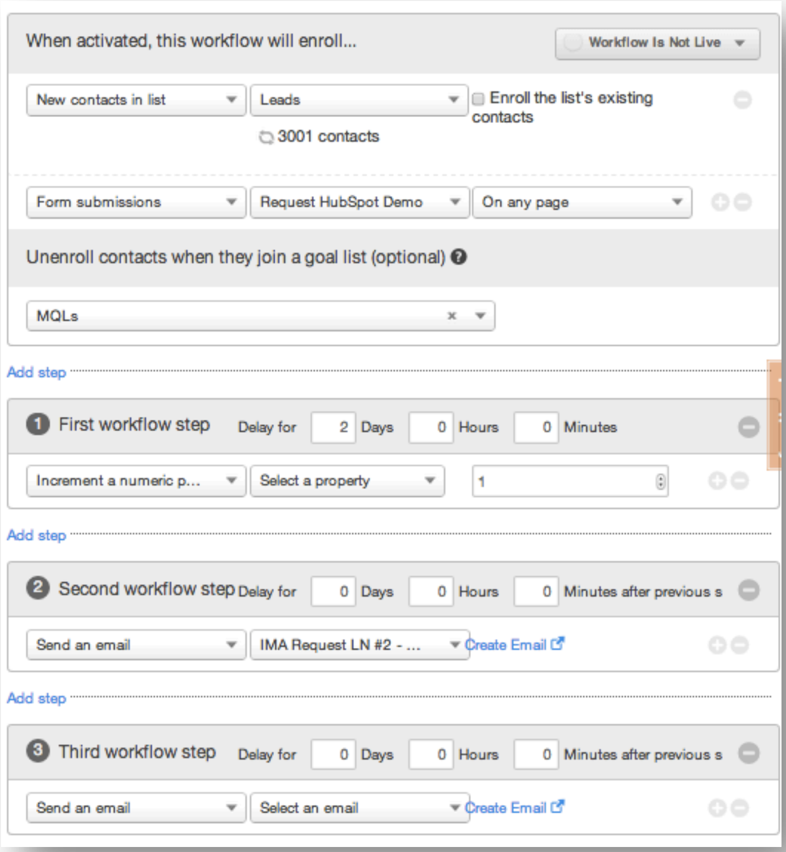
- The **"From" name** should be from a person, not just a company name.
- The **"Reply to" email address** should be a working address that belongs to the person sending the email. This means info@companyname.com won't suffice—it isn't personal enough.
- Your **subject line** needs to be fewer than 45 characters while telling the person the value of the email. Do not try to pull a bait-and-switch on your leads or customers; they will mark you as spam. Be honest. And if you have doubts about your contacts opening a particular email. that's a sign you probably need to rethink the offer. You can also add personalization here if necessary. For example, "Thanks for requesting a demo, <FIRST NAME>!"
- If you have an **email headline** (the first couple of sentences at the top of the page), make sure it relates back to the subject line and explains the benefit of the content in the email.

- The **email body**, or content, should be short! No more than 200 words. Make sure to personalize when it makes sense. For example, you can say “Dear <FIRST NAME>”.
- Use **plain text** with no images if you’re following up casually or sending soft offers that aren’t from the marketing team (this is great for automating sales follow-ups).
- Use a **designed email** with one or two images when you’re sending automated emails from marketing.
- Always include a **call to action** at the bottom of the email that matches the content in the email. Make sure this is linked to a unique tracking code URL. HubSpot automatically does this for you.
- The **signature** at the bottom of the email should be signed as the person who is in the “From” field of your email.
- The **number of emails** you create should not exceed eight per campaign.

PRO TIP: *Tell a story with your campaign*. Lead contacts through your campaign so they know what they should be doing next. If you can tell a story in three emails, then do that. You don’t need 100 emails to get a lead to convert to the next stage in your sales cycle.

Step 6: Build your workflow

Building your workflow in HubSpot is fairly simple. Once you create your list or choose a form to trigger your workflow, write your emails, and save them for automation, you can start using the Workflow tool in HubSpot.

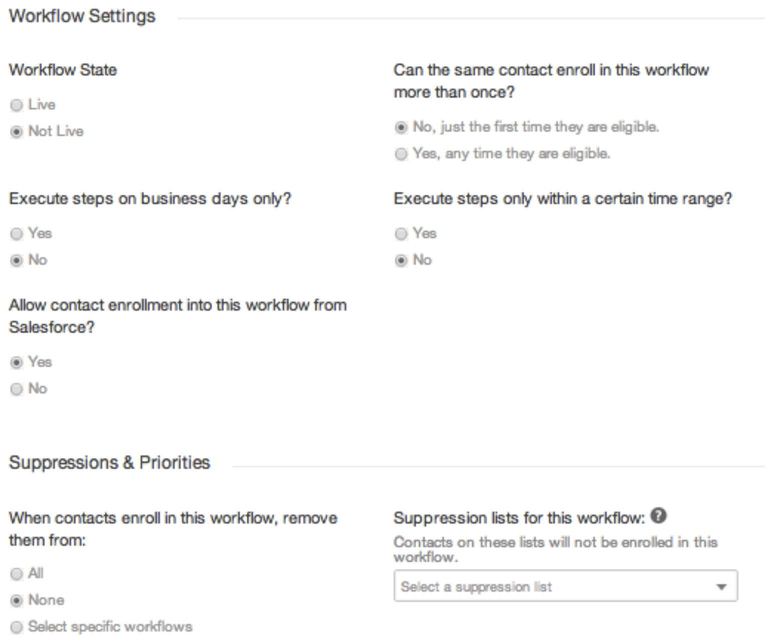


- At the top, **choose your list or form** that you would like to start the workflow with. You can choose multiple lists. Typically, you'll want to enroll current contacts in the workflow unless you only want to follow up with new leads in the list. An example of this would be if you had a workflow set up to notify a salesperson any time a new person entered the Marketing Qualified Lead (MQL) list.

- Decide on **a goal list** that will remove leads from the workflow when they meet the desired qualification.

- Choose the **timing, or delay**, of the emails being sent out. Questions such as "How long should a workflow be?" often come up. There is no set answer for this because every company's sales cycle is different. Wait at least a day before sending out another email. Bombarding your leads with offers is a not cool.

- Check your **Workflow Settings**. Here, you can decide if you want to add a suppression list (meaning these people won't be in the workflow ever), whether to send out on business days only, to execute steps within a certain time range, and to enroll the same contact in the workflow more than once. It looks like this:

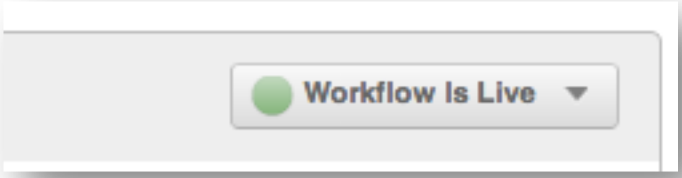


Step 7: Test the campaign before launching

This step may be slightly time-consuming, but don't skip it! Before launching your campaign, send your emails to people you work with in different departments. Have your co-workers respond back if they find errors in grammar or in images loading, if something was unclear, or if the offer isn't aligned with what they thought they were going to get. By doing this, you will improve your overall campaign and receive feedback that you can apply to your next campaign.

Step 8: Make the workflow live and start collecting data

Now that you have your workflow set up, launch your campaign! You can do this by making it live in HubSpot.



Once your workflow is live, data will start being collected on each of the emails. This is when you can start tracking the effectiveness of each of the emails and the overall campaign success.

Step 9: Analyze the results and tweak emails accordingly

The question on the top of every marketer and business owner's mind is "How did my campaign do?" Here are a few metrics you can track to measure your campaign's success:

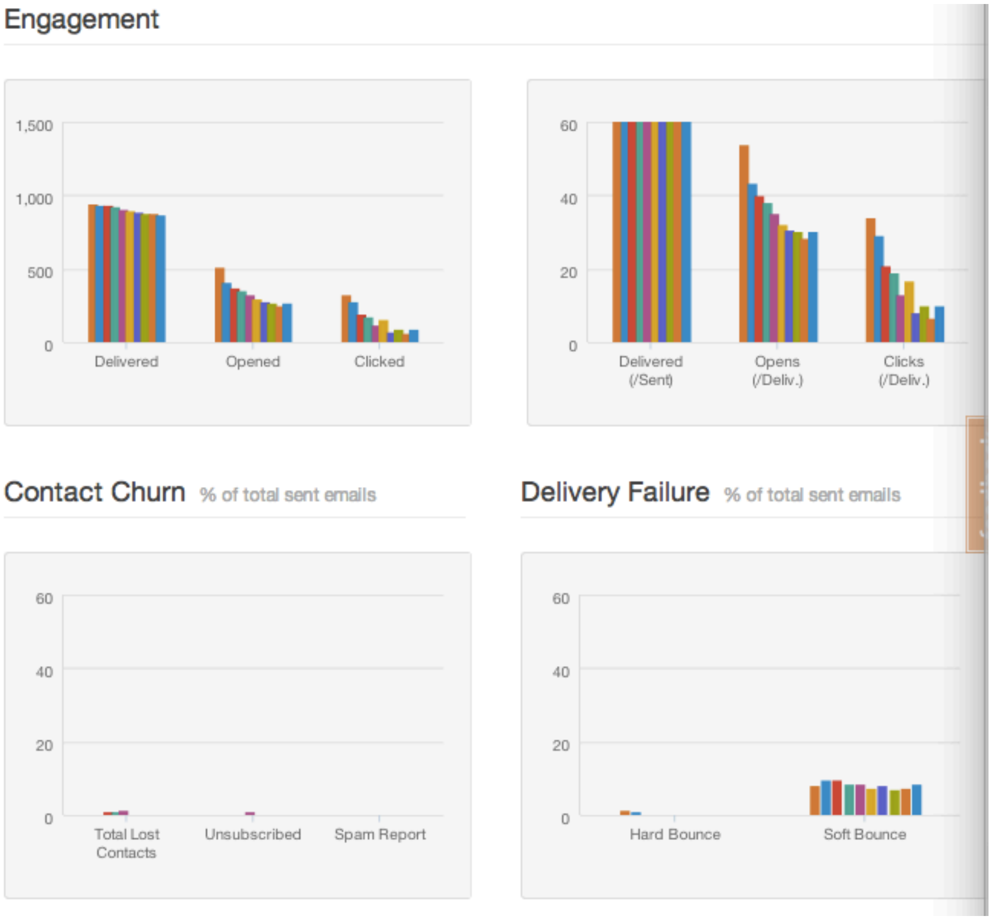
- Each email's **click-through rate**: Percentage of people who click on a link in your email; should be at least 5 percent for a good overall campaign.
- The number of **conversions** on each landing page: How many people clicked on the landing page link and actually followed through with filling out the form?
- **Unsubscribe** rate for each email: Should be less than 1 percent.
- Do not focus on open rates. They are not a reliable statistic.

With your data, you can start picking out where your campaign needs adjusting. For example, if you notice that your first email had a high click-through rate, but the next few sharply declined in clicks, consider changing the email copy or timing. Recipients possibly felt the message was redundant or not in line with the buying process, or they received the email too soon or too long after the initial email. Similarly, you should modify your emails if you notice a high unsubscribe rate.

Some places in your campaign where you can make adjustments include:

- Subject line text
- Copy or body of the email
- The offer you are promoting in the email
- Frequency of the emails (delay or timing)
- The value proposition of the email: Does it match where they are in the sales cycle?

Workflow Performance Reports in HubSpot look like this:


Engagement
1,500
1,000
500
0
Delivered
Opened
Clicked
60
40
20
0
Delivered (/Sent)
Opens (/Deliv.)
Clicks (/Deliv.)
Contact Churn % of total sent emails
60
40
20
0
Total Lost Contacts
Unsubscribed
Spam Report
Delivery Failure % of total sent emails
60
40
20
0
Hard Bounce
Soft Bounce

Chapter 4: Examples of Extremely Useful Automated Email Workflows

By now, you know how to approach your lead nurturing campaigns, how to appeal to your contacts, and what to include in each campaign. However, you may not know what kind of workflows are most effective and what's included in each stage of the campaign. What follows are instructions for building several different kinds of campaigns. Notice that you don't need a hundred emails to be effective.

Sales Cycle Workflows

The Subscriber-to-Lead Workflow

Goal: *Convert subscribers into leads by sending two emails.*

Why: *They know who you are and what you do. Now, engage them into considering becoming your customer.*

Instructions:

1. Create a Smart List that groups all the contacts with a "Subscriber" lifecycle stage to trigger your workflow.

2. Create a Smart List that groups all the contacts with a "Lead" lifecycle stage, and use as your goal list

3. **Email 1:** Promote your most popular offer.

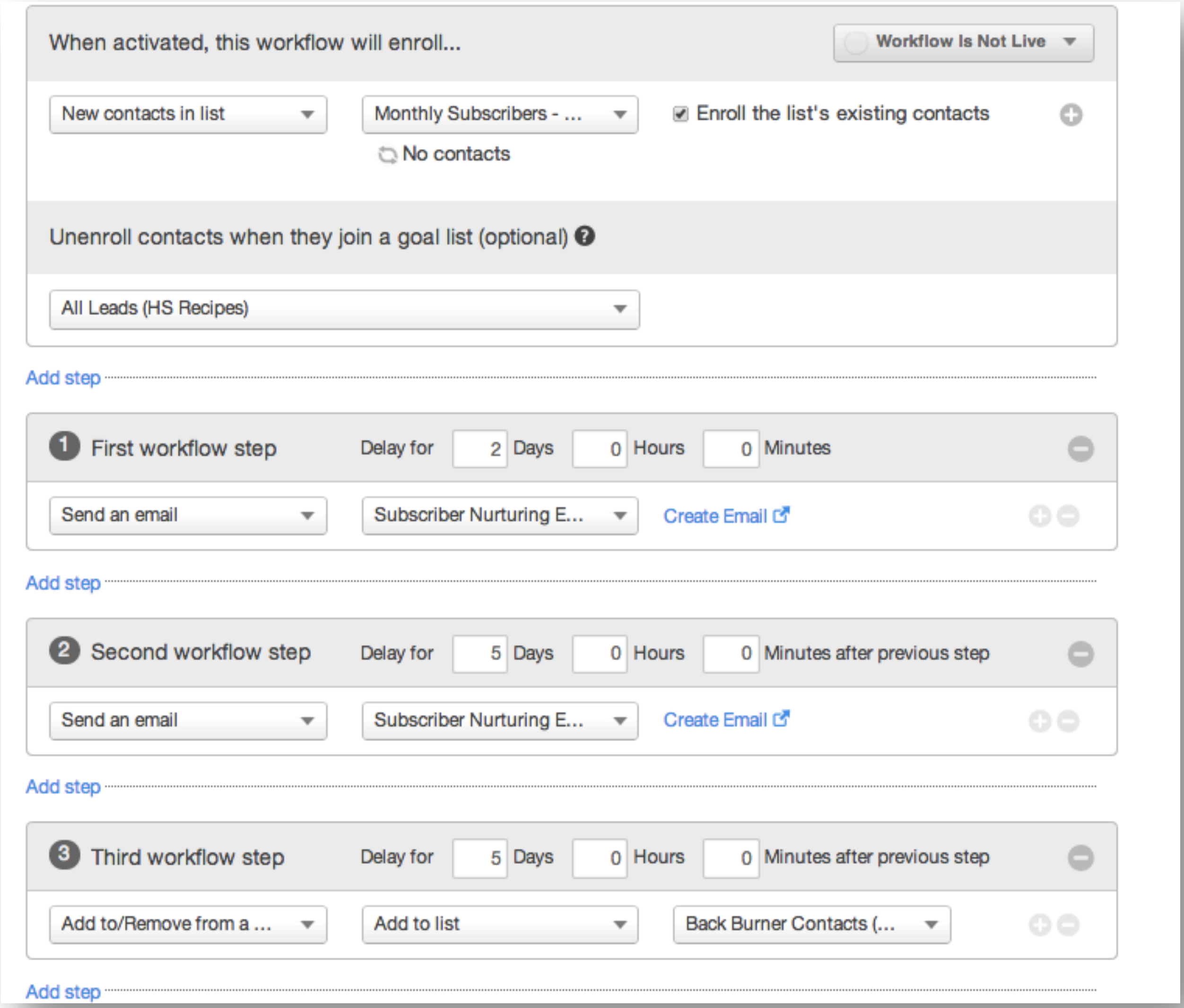
4. Set a delay that matches your sales cycle, and attach the email to your workflow to convert subscribers into leads

5. **Email 2:** Promote a different, but effective, offer to the subscribers who didn't become leads on the previous step.

6. Set a delay that matches your sales cycle and attach the email to the workflow.

7. Add one more step to the workflow that adds the leads from your current subscriber list to a "Back Burner Subscriber List" to follow up with later in a new workflow.

Note: Because you've set up Smart Lists, you will not need to update your lists manually.



PRO TIP: Once you finish this campaign, brainstorm what your “Back Burner Subscriber List” of leads may need from you. Try focusing on other pain points of your target personas and build off that.

Simple Lead Nurturing Workflow

***Goal**: Convert leads into marketing qualified leads.*

***Why:** Your offers are what leads need to move through the sales cycle. This simple workflow will help encourage that process.*

Instructions:

1. Create a Smart List that groups all the contacts with a “Lead” lifecycle stage to trigger your workflow.

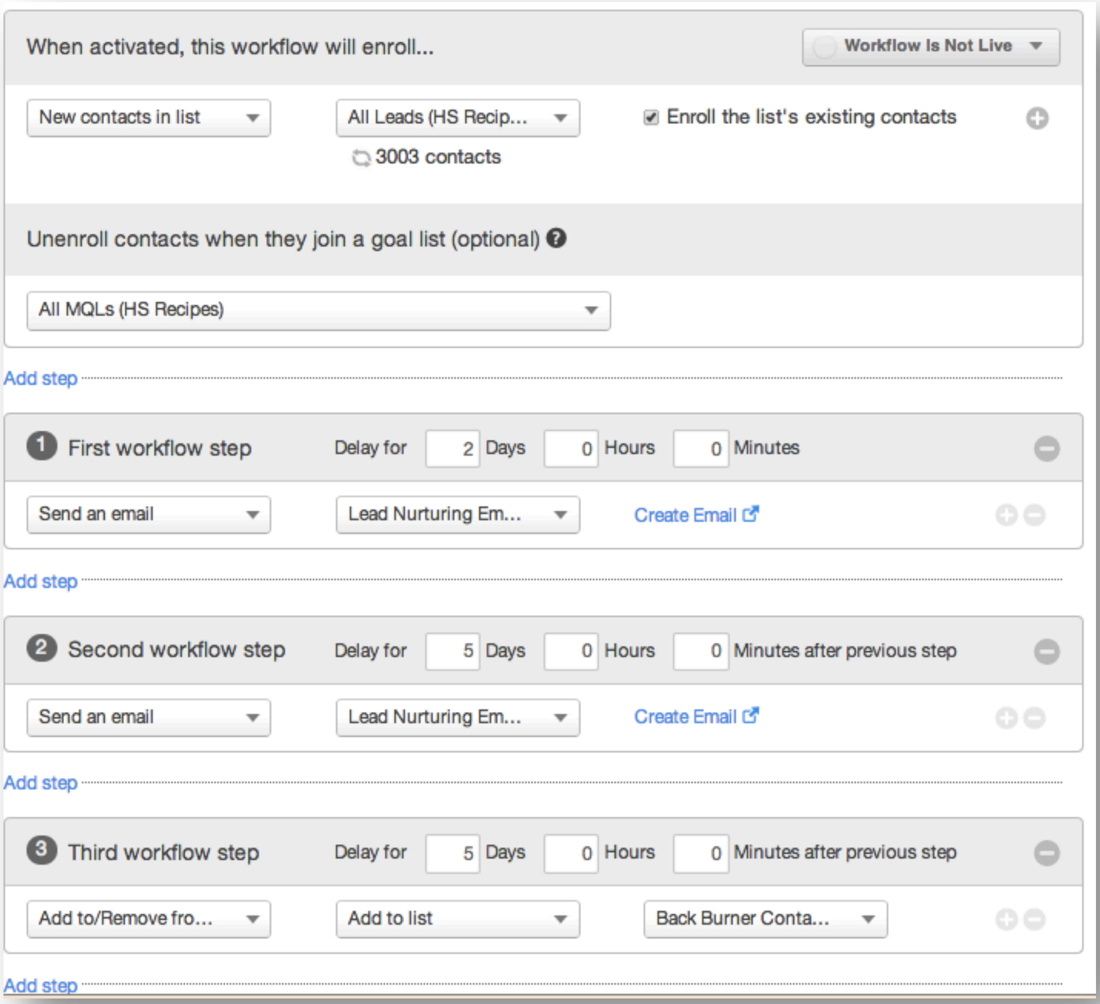
2. Create a Smart List that groups all the contacts with a “Marketing Qualified Lead” lifecycle stage for your goal list.

3. **Email 1:** Delay two days and promote an *offer that corresponds with the Consideration sales cycle stage* (for example, a webinar or Q&A session).

4. **Email 2:** Delay five days and invite leads *to register for a consultation*, demo, trial, or any other highly qualifying kind of marketing offer.

5. Add one more step to the workflow that adds the leads from your current subscriber list to a “Back Burner List” to follow up with later in a new workflow, delayed five days.

Note: Because you’ve set up Smart Lists, you will not need to update your lists manually.



PRO TIP: Depending on your sales cycle, you may need to add another email or two. This is a guideline, not a solid rule. Always stay true to *your* company's sales cycle.

Before a Trade Show or Event Workflow

Goal: *Encourage attendance and educate about the event.*

Why: *Attendees should be excited to attend your event or visit your trade show booth. This workflow shows them the benefits of what they've signed up for and helps keep up the momentum until the event begins.*

Instructions:

1. Trigger the workflow off your event registration form or a list of contacts you know have registered.

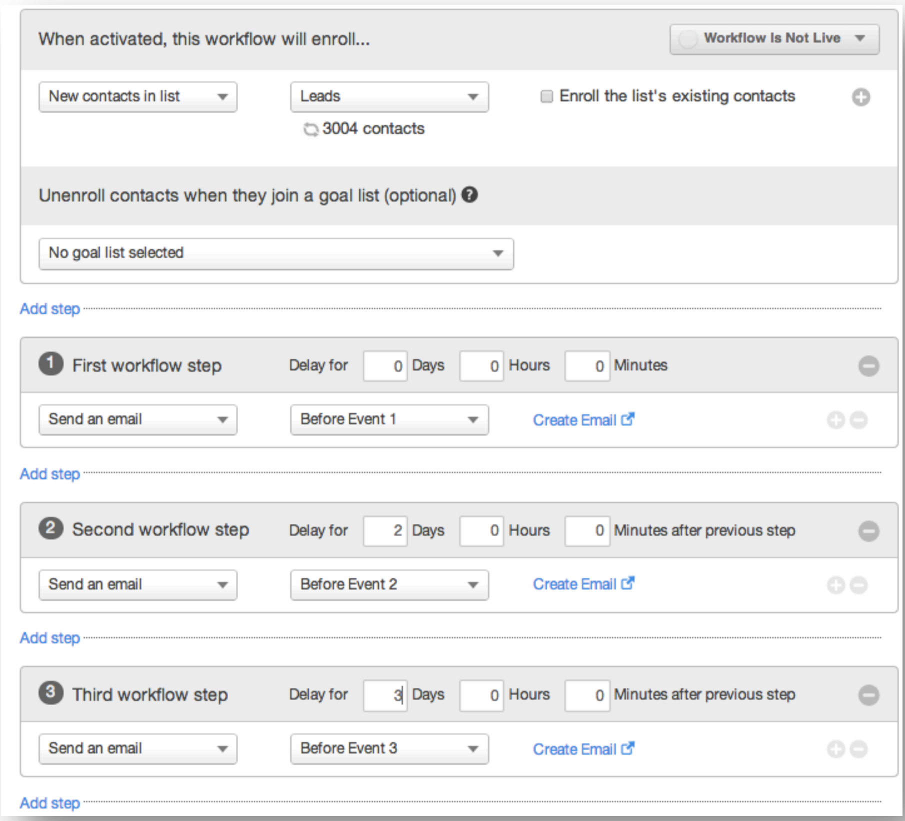
2. There is no goal list for this workflow.

3. **Email 1:** Send immediately after registration, thanking the registrant for attending the event.

4. **Email 2:** One day after registration, send information about event location, hotel accommodations, and networking information.

5. **Email 3:** Three days after registration, send information about the speakers featured at the event or what booths your attendees should visit.

6. In Workflow Settings, suppress a list of people who have not registered for the event to ensure those who do not need the emails do not receive them.



PRO TIP: Be sure to change the timing (or delays) on emails 2 and 3 the closer you are to the date of the event. For example, if Mary registers two days before the event, receiving an email three days after her registration is a little pointless. Alternatively, you can create a list of people who register a couple of days before or the day of the event, suppress them from this workflow, and create another workflow with fewer emails and shorter delays. You can suppress a list from a workflow in Workflow Settings.

After a Trade Show or Event Workflow

Goal: *Encourage attendees to become marketing qualified leads.*

Why: *This is a great opportunity to continue the conversation from your event and measure the return on investment (ROI) of your outbound marketing tactics.*

Instructions:

1. Trigger the workflow off your event registration form or a list of contacts you know have registered.

2. Set the goal list to “Marketing Qualified Leads.”

3. **Email 1:** Delay one day and then send an email thanking leads for their attendance and summarizing the event with corresponding links to videos or blog posts.

4. **Email 2:** Delay three days and then send an email promoting an offer that is in alignment with something the attendee learned from the event (for example, if you are holding a healthcare conference, you may want to follow up with a white paper on the new technology you were showcasing at the event).

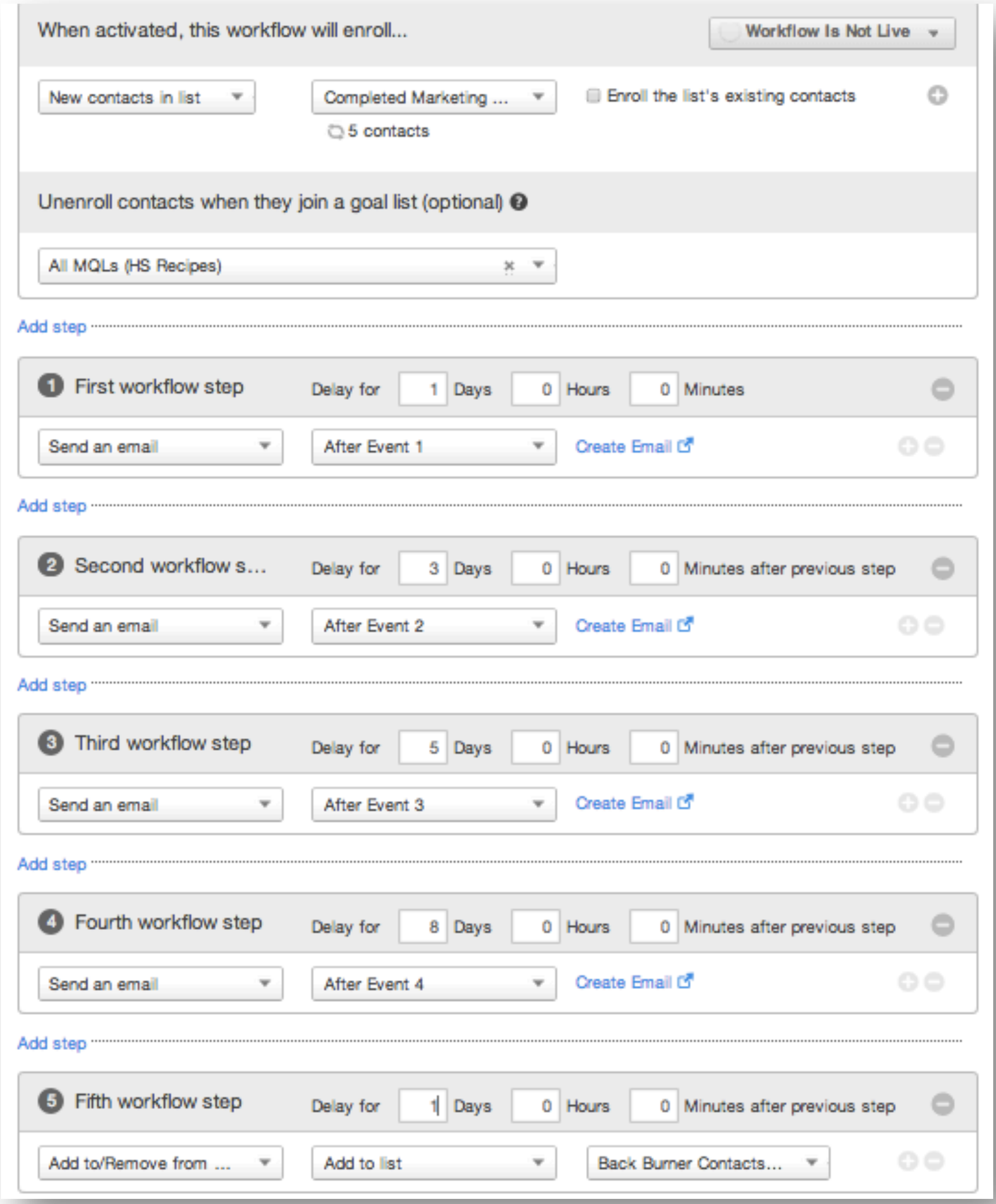
5. **Email 3:** Delay five days and send an email inviting the lead to download an offer in the Consideration stage of the sales cycle (for example, a live Q&A session with the scientist behind your new technology).

6. **Email 4:** Delay eight days and send an email that encourages the lead to sign up for a consultation, demo, free trial, and so on.

7. Add a step to the workflow and moves leads that didn’t convert into an “Event Back Burner Leads” list.

8. In Workflow Settings, suppress a list of people who have not registered for the event to make sure those who do not need the emails do not receive them.

Note: Make sure your MQL list rules require your leads to fill out an offer in the Purchase stage of the sales cycle.



PRO TIP 1: Prepare for the follow-up workflow by creating content prior to the event. This way, you can set up the workflow beforehand and not worry about it.

PRO TIP 2: Remember to add a suppression list in the Workflow Settings that excludes those who registered but did not attend the event. Create a different campaign for those leads with a "Here's what you missed!" angle.

Sales Notification Workflow

Goal: *Notify sales about new marketing qualified leads.*

Why: *Keeps your sales team updated the minute an MQL is submitted. This will keep them happy and excited about your inbound efforts.*

Instructions:

1. Craft an email that notifies the appropriate salesperson of a new marketing qualified lead.

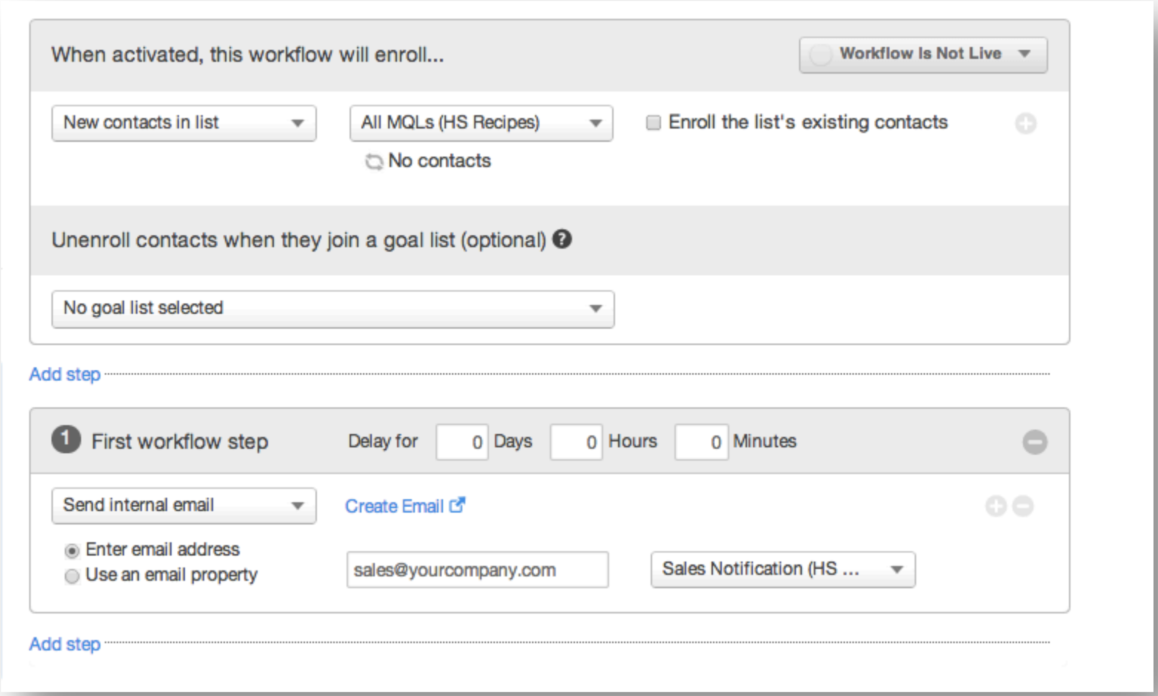
2. Set up a workflow that is triggered by new leads in your Marketing Qualified Leads list. (Do not check the box to include all contacts.)

3. There is no goal list.

4. There is no delay set for this workflow.

5. Use the option “Enter email address” to enter the salesperson’s email.

Note: Because you’ve set up Smart Lists, you will not need to update your subscriber and leads lists manually.



PRO TIP: In your email, include the contact properties that matter most to your sales team, such as phone number, email, and so on. You can insert these with the personalization tool.

Marketing Qualified Lead-to-Customer Workflow

Goal: *Encourage your MQLs to purchase your product or service.*

Why: *Sometimes leads request a consultation, trial, or demo but don't follow through with appointment. This nurture encourages attendance.*

Instructions:

1. Trigger the workflow off your event registration form or a list of contacts you know have registered.

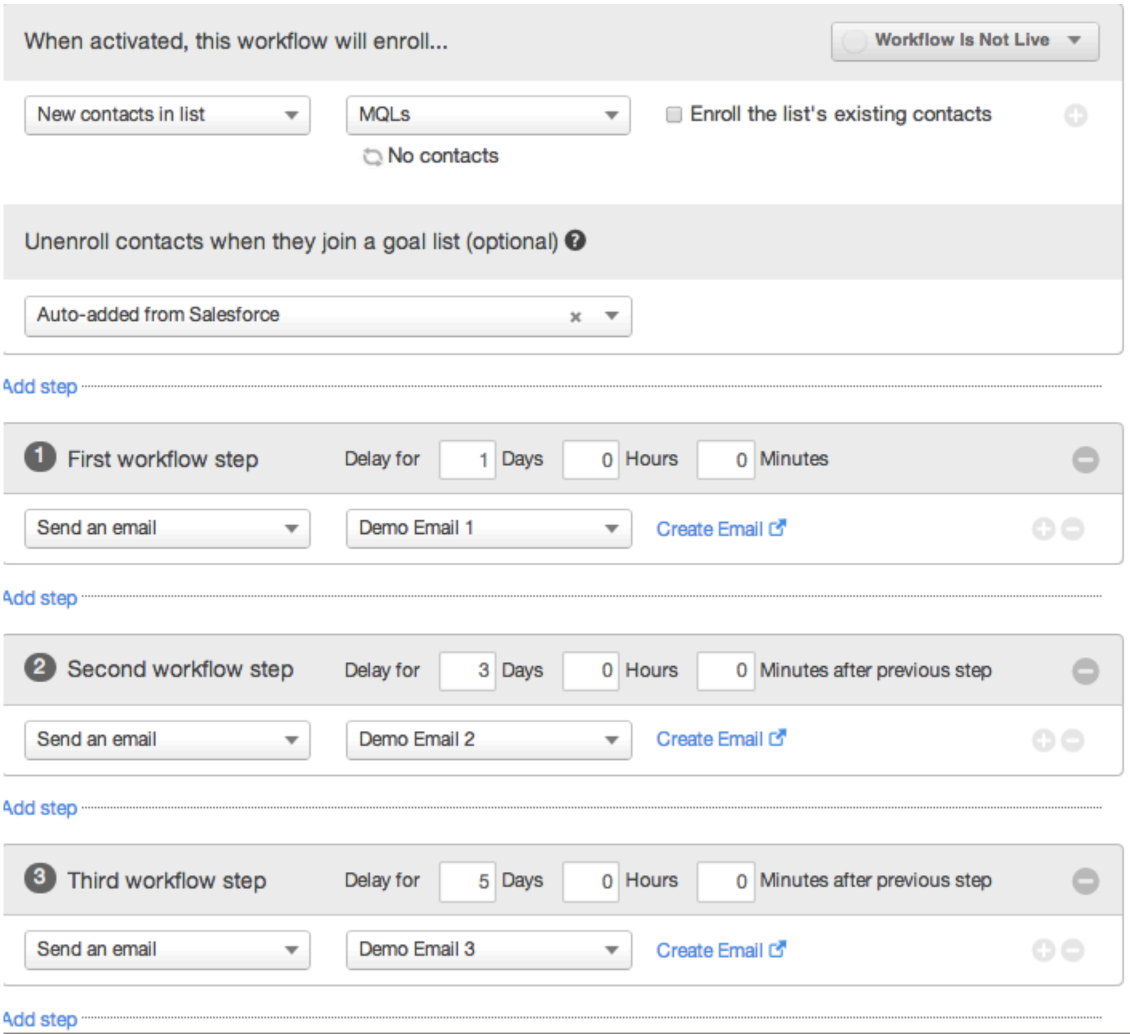
2. Goal list is "Spoke with Sales."

3. **Email 1:** No delay. Send an email thanking leads for requesting your consultation, free trial, demo, and so on, and what they can expect to get out of attending the meeting.

4. **Email 2:** Delay three days. Send an email outlining the benefits of your product or service and how it will make their lives better. Include links to customer case studies or testimonials.

5. **Email 3:** Delay five days. Send an email thanking the person again for interest in your product or service. Outline different pain points of your offer than you did in the first email. Include a phone number and email of the sales rep.

NOTE: Customize the delay of emails based on *your* sales cycle. This is a guideline, not a rule. Your sales cycle matters most, so follow that.



PRO TIP: You can add your sales reps to HubSpot, where they can update a contact property to identify which leads they've spoken to. An easier way to this is by integrating HubSpot with your Salesforce.com account. Your sales team can update the contact property right from Salesforce. That information syncs with HubSpot and updates your lists accordingly.

Customer Delight Workflow

Goal: *Delight current customers and encourage more engagement.*

Why: *You're getting new customers. This helps you to take them from happy customers to evangelists of your product or service.*

Instructions:

1. Create a Smart List that groups all the contacts with a "Customer" lifecycle stage that triggers the workflow.

2. There will be no goal list on this workflow.

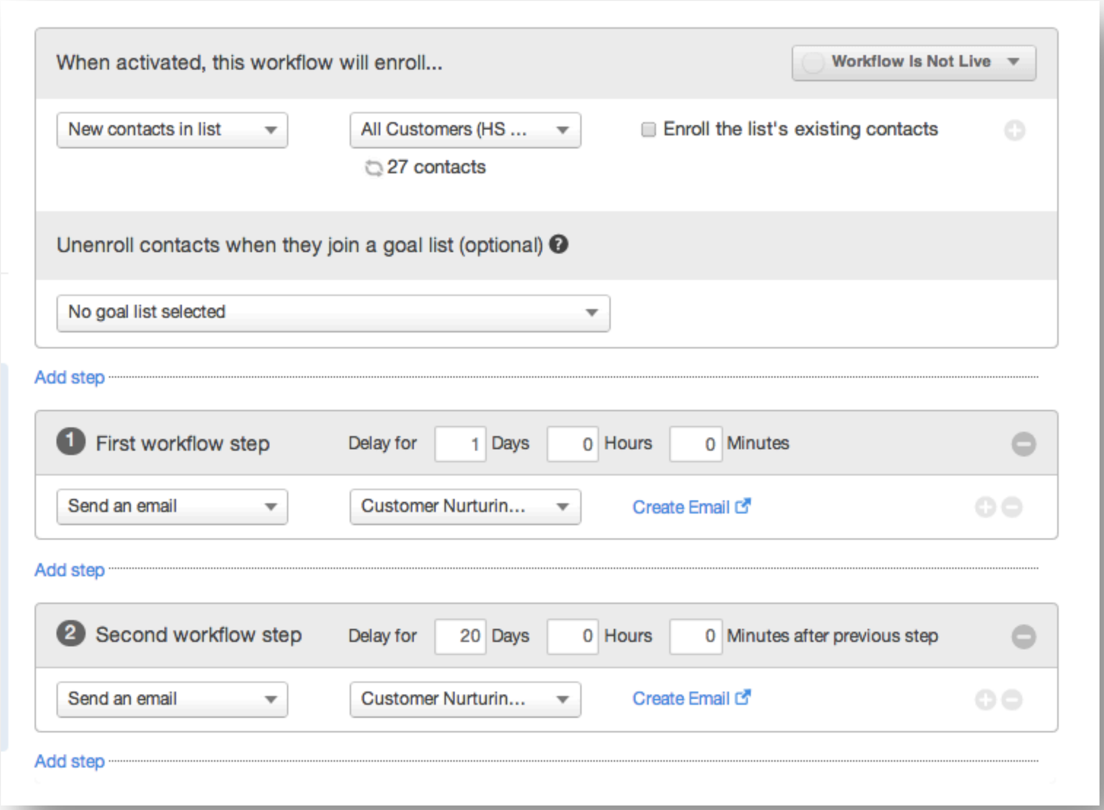
3. **Email 1:** Delay one day. Send email to welcome leads who convert to customers. In the email, share your social networks, the exciting things happening in your company, and how customers can be a part of it.

4. **Email 2:** Delay three weeks. Send email to encourage your new customers to upgrade, apply a discount, or retrieve a special offer within the first month.

5. Make sure to check in with your customers and their happiness by including a sentence such as "How are enjoying [product or service name]?" End the email with a closing sentence such as "If you have any questions, comments, or concerns, please feel free to respond to this email or call [insert phone number]."

6. You can schedule a third or fourth email for the next couple of months if you already have your offers planned out for the quarter.

Note: Because you've set up Smart Lists, you will not need to update your customer list manually



PRO TIP: Follow up with your customers at least once a month to engage and delight them.

Miscellaneous Workflow Ideas

Sometimes workflows don't fall under a specific step-by-step plan. They venture off the beaten path to fit your specific business needs. Here are a few workflow ideas to get your creative juices flowing for your business.

Course or Program Workflow

Often, companies in industries such as education or healthcare offer courses or programs for their customers. Typically, these kinds of service offerings come with a specific time allotted to complete the program. For this kind of offer, workflows can be extremely helpful in keeping your students or patients on track with the program of their choice.

You will want to include the following in your workflow:

- A Smart List that includes all new registrants into your program that triggers the workflow.
- Emails for each stage of the program. For example, if your customer has signed up for an eight-week program, customize eight separate emails that outline the benefits of each stage of the program, including encouragement to continue on the path.
- Set up a goal list called "Program Completed" for customers who have successfully completed the program after the designated eight weeks; send them a congratulations email and start another, shorter, workflow to encourage additional purchases of your service offerings.
- Your final step should be "Add to List". Those customers who did not complete the program within the eight weeks allotted should be added to a list called "Needs to Complete Program". From that list, you can trigger a workflow with encouragement and information about others' success.

Note: If you're not sure how to track the completion of the program, you can use HubSpot Enterprise tools to do this with event tracking or Smart Forms in the Professional tool. Simply create a hidden field called "Completed Week [1, 2, 3, and so forth] that has a value of "Yes". Add a submit button that your customer sees as "Yes! I completed this task!" It will update the contact property of your lead, thus making it easy for you track who has completed each stage of the program. Event tracking is much more simple, though.

Daily Offer Workflow

Many websites are popping up that offer something for their leads to receive on a daily basis. For example Goodreads.com offers a free daily quote. This kind of offer can become onerous if you're trying to send them out one by one.

To set up this kind of workflow, you will need:

- A list of all contacts who have signed up for this offer that triggers the workflow to start
- Thirty emails with the offer that you can send out every day for next month (keep on top of this so that you don't fall behind)
- A call to action at the end of every email so that you're not doing all of this work in vain

Note: While these offers are appealing to many people, ask yourself whether they will get you to your goals and track whether people actually convert into leads and customers from the campaign. If they don't, you may want to discontinue the offer or include more enticing offers within each email.

Specific Topic or Product Workflow

This kind of workflow is great for bucketing different industry-related topics together. It's also a great way to start segmenting your leads if you haven't done so already.

For example, if you own an auto body and mechanic shop and you've been creating content about car engines, body paint, sound systems, and tires, you can segment all of that content (ebooks, white papers, webinars, and so on) by these topics. Then, you can create a workflow based on each topic. So, when a lead downloads a piece of content from your website, an appropriate workflow is triggered. For example, if Carl downloads *The Ultimate Guide to Picking the Best Car Subwoofer*, your "Sound System" workflow would send Carl the content in that bucket.

To do this you will need to:

- Segment your content based on topic and create emails for each piece.
- Create workflows that are triggered by the main content offer for each bucket.
- Create suppression lists for leads who have already downloaded the content you're offering in the workflow.

Note: Be conscious about what you're sending and to whom. If you have two sound system offers live on your website, you may need to create two separate workflows so that your leads don't receive the same offer twice.

Data Collection or Survey Workflow

For many of you, requesting customers to fill out surveys is a very real part of your business or role as a marketer. You can gain much insight into how your customers think and further research on persona development. When you request a survey to be filled out, what is the No. 1 problem? Many people don't take the time to actually fill it out! This could be because our customers are busy just like us and procrastinate. Workflows can help solve this problem or, at least, increase the likelihood of more contacts filling out the survey.

You will need to create:

- A survey that asks pertinent questions about your customers' feelings and thoughts. This can be a Net Promoter Score (NPS) survey as well.
- A workflow triggered by a list of all of your customers.
- A goal list of those who completed the survey.
- **Email 1:** An email asking the lead to take a small amount of time to help you out with the survey. (If you can include an offer, such as a $5 gift card, that helps. If not, don't worry. You don't have to provide monetary value get results.)
- **Email 2:** If the customer hasn't filled out the survey, send them a gentle reminder that you would love to hear their opinions so that you can continue to grow and improve your product or service.
- **Email 3:** A high-level, anonymous overview of what the survey results have shown so far. You can ask your customer if they agree or disagree with the results. Then, reiterate that their opinion is important to you. Include the link to the survey one last time.
- These emails should go out over the course of a week. If, at the end of the week, you have people who didn't respond, add them to a list to delight at a future time.

BONUS MATERIAL

How Automated Email Workflows Are Like Finding Your Soul Mate

Two People Meet for the First Time

You're out with your friends and you gaze upon the most beautiful person you've ever seen. You walk over, introduce yourself, and enjoy a quick conversation about who you are on the surface, what you do, where you're from, and so on. Basically, you are both collecting information about whether you will need each other after this conversation.

You Go on a First Date

Great news! The person liked you! This wonderful individual gave you contact information and wants to meet you again. You feel the same way, send an email, and make plans for dinner. You go on a date and talk about things that are a little more personal, and that's OK. Remember: Don't get *too* personal here!

You Become a Couple

Things have been going well for a while. Your new partner visits you all the time, you're dating frequently, and you two love what each other has to say about the world you live in. Your new love starts to think you may be the one but needs to find out if you align on a deeper level. You're starting to ask the right questions, and your partner starts to believe you may be the one.

You 're Engaged!

Now that you both know each other extremely well and are excited to talk about your future together, you can start planning the wedding. How much will it cost? Will you need a large attendee list? Will there be a sit-down or buffet style dinner? How much time will it take?

You're Married!

You did it! You pulled off the wedding within your budget and are living happily side by side. And do you know why you were successful? Because you didn't pressure your partner into committing too soon. You started off easy and then gradually became more and more serious to the point where it made sense to get married. You didn't ask the person out and then propose on the first date.

CONCLUSION: Your leads think the same way. If you approach them and they find you interesting, that does not give you permission to send them a free trial offer. Lead them down the path, woo them, and get engaged naturally.

Free Template: Lead Nurturing Campaign Map Workbook

While creating your campaigns, it's important to stay organized. We've created a comprehensive workbook for you to download for free. **Click here to get access to the workbook**.

Example of Workbook:

Marketing Mary	Stage of the Buying Cycle			
	ATTRACT	**TOFU**	**MOFU**	**BOFU**
Content I Have	Blog Posts	10 Tips for Lead Nurturing Campaigns	Webinar: Smarketing	Inbound Marketing Assessment
Content I Have	Press Releases	Whitepaper: Social Media Data	Ebook: Choosing a marketing automation tool	Free Demo
Content I Have	PPC Campaigns	Email Copy Check list	Q&A with a HubSpot Expert	--
Content I Have	--	Ebook: How to delight customers	--	--
Content I Have	--	--	--	--
Content I Need	Guest Blog Posts	New Content 1	New Content 1	New Content 1
Content I Need	Original Image creation	New Content 2	New Content 2	New Content 2
Content I Need	Social Media Campaigns	New Content 3	New Conent 3	New Conent 3
Content I Need	--	New Content 4	--	New Content 4
Content I Need	--	--	--	New Content 5
Time Spent in Stage	**2 weeks**	**3 weeks**	**2 weeks**	**1 week**

Click here to download the complete workbook

Free Personalized Marketing Assessment

How can inbound marketing help you achieve your business goals?

This meeting is designed to help you understand how you can improve. This is not a sales call. If you believe we can help you meet your goals, or want to learn more, we'll schedule another call at a different time to discuss options.

In this free 30-minute inbound marketing assessment, we'll provide the following:

- A detailed assessment of your website marketing and its inbound potential
- An assessment of your current marketing strategy and areas for improvement
- Actionable insights you can take with you and implement now -- the low hanging fruit!
- How inbound marketing can help you meet your business goals

Click the button below to get your free marketing assessment!

Request a Free Personalized Marketing Assessment!

