The definitive guide to lead nurturing.

Table of contents

An overview of this guide. 4

An intro to lead nurturing. 5

What is lead nurturing? 5

The benefits of lead nurturing. 5

Develop your strategy. 6

Start by setting goals. 6

Picking the right technology. 7

Nurture as part of your overall marketing strategy. 8

Comvita watched lead conversion soar. 10

Decide who to nurture. 11

Defining what a lead is for you. 11

A look at lead scoring. 11

An overview of list building. 14

Keeping your database healthy. 16

Oktopost boosted effectiveness and conversions. 17

Manage lead nurturing across channels. 18

Nurturing in a multichannel world. 18

Create and deliver engaging content. 21

Defining your content strategy. 21

Align content formats to the customer buying cycle. 21

The types of nurture content. 23

The anatomy of a lead nurture email. 24

Email creation best practices. 25

Implement basic lead nurture segmentation. 28

The importance of segmentation. 28

The two dimensions of segmentation. 28

Explore advanced lead nurture segmentation. 31

The value of behavioral segmentation. 31

A brief overview of specialized campaigns. 32

Looking at late-stage campaigns. 33

Create your lead nurture matrix. 34

Perform testing and optimization. 38

Why testing is crucial. 38

Calculate the ROI of lead nurturing. 40

Basic lead nurturing email measurements. 40

Understanding advanced measurements. 41

Go big with lead nurturing. 43

An overview of this guide.

Today's potential buyers don't become customers overnight—they require marketing over time as they self-educate and build trust with a company.

Lead nurturing can make your marketing and sales efforts much more effective by warming up leads before they interact with your sales team. Developing a relationship with leads before they're sales-ready results in a much higher conversion rate and helps generate more revenue for your business.

With lead nurturing, marketers can communicate consistently with buyers across channels and throughout the sales cycle—addressing the gap in time between when a lead first interacts with you and when they're ready to purchase.

Lead nurturing is an integral part of a successful marketing strategy—specifically when building relationships with potential buyers on multiple channels, even if they are not currently looking to purchase a product or service.

We've gathered the best practices from across the marketing landscape—thought leaders, customers, research, and our own experiences—to bring you *The Definitive Guide to Lead Nurturing.*

This guide is designed to be useful, practical, and informative. It offers a comprehensive description of lead nurturing best practices, from getting started to advanced techniques.

In this guide, you'll learn how to:

1. Create a lead-nurture strategy
2. Nurture leads across channels
3. Segment a lead database
4. Choose the right content for each lead nurture track and audience
5. Get the most value from lead nurturing with testing and optimization

AN INTRO TO LEAD NURTURING.

What is lead nurturing?

It's the process of building effective relationships with potential customers throughout the buying journey.

According to our benchmark study 50% of leads on average are not yet ready to buy. Lead nurturing creates automated, ongoing communication with your potential buyers throughout the sales cycle and beyond—maximizing results and revenue for your organization.

In fact, we have such an active and wide top of funnel that 98% of leads entering our database are not sales-ready. Which means we have to nurture those buyers until they're ready to make a purchase. Lead nurturing automates your communication with those leads so that you are constantly engaging in a relationship throughout their entire buying journey.

Sophisticated technology like marketing automation makes modern-day lead nurturing personalized and adaptive. It can listen and react to buyer behavior in real time.

Modern lead nurturing enables you to listen and respond to buyers on multiple channels—not just email. And now, with breakthroughs like personalization software, marketers can nurture anonymous leads throughout the entire lifecycle, creating a more engaging experience than ever before.

The benefits of lead nurturing.

Businesses today exist in an increasingly connected market. Buyers expect an extremely personalized, cross-channel experience. They don't want to be spoken to—they want to be listened to. And companies want to create relationships with potential buyers to build trust and eventually advocacy.

Lead nurturing facilitates your buyer getting to know your business. With it, you spend time establishing a relationship with your buyer and building trust. As a result, communication with your buyer is welcomed instead of intrusive.

Without effective lead nurturing, talking to your buyers can feel awkward, full of mistrust and hesitation.

Lead nurturing helps with:

- Increasing the propensity to buy
- Relationship building
- Brand and thought leadership
- Shortening the sales cycle

79%

79% of marketing leads never convert to sales. Lack of lead nurturing is the common case for poor performance.

Source: MarketingSherpa

50%

50% more sales-ready leads generated at a 33% lower cost for companies that excel at lead nurturing.

Source: Adobe

72%

Nurturing leads with content relevant to where they are in the buyer's journey can boost conversion rates by 72%.

Source: Business 2 Community

DEVELOP YOUR STRATEGY.

Start by setting goals.

A look at qualitative objectives.

Your lead nurture efforts will include qualitative goals. What business outcomes do you hope to get from setting up lead nurture tracks? Consider the following goals:

- Convert sales inquiries to qualified prospects over time
- Move your buyers through their buying journey at an accelerated pace
- Engage in conversations with your buyers
- Qualify and collect more information from inbound leads
- Educate and build trust with existing leads
- Stay in touch with existing leads, so they can call on your company when they need to
- Acquire more business from current customers
- Turn dormant leads to active leads
- Increase sales productivity by distributing only sales-ready leads

Set qualitative goals for your lead nurture campaigns to guide decisions on timing, frequency, segmentation, and strategy. Continue revisiting these goals to ensure your nurture programs achieve them.

A look at quantitative objectives.

In addition to creating qualitative objectives, be sure to set goals that are quantitative—those that you can measure. Even if you aren't sure what your metrics should be initially, settingestimates up front helps you define your program. Quantitative metrics not only help you define success, but they also help you determine the scope and scale of your overall lead nurturing efforts.

Without quantitative goals in place, your lead nurturing program can lack purpose—and you'll have greater difficulty tracking your progress toward your objectives.

Here are some quantitative goals you may want to consider:

- Improve the percentage rate at which raw leads convert to qualified prospects
- Improve the percentage rate at which raw leads convert to closed deals
- Increase the number of sales-ready leads per month
- Reduce the number of leads rejected by sales
- Generate a certain number of incremental opportunities per month from the existing database
- Achieve a faster sales cycle
- Get better win rates
- Increase upsell or cross-sell with current customers

Start small, think big.

As you look to implement qualitative and quantitative benchmarks, it's important to take a phased approach to your nurture launches and implementations, depending on how complex they may be. Phasing your engagement growth can allow you to:

- Launch faster and more systematically
- Minimize risk of error over complex solutions and implementations
- Set goals and benchmarks to see what works

DEVELOP YOUR STRATEGY.

Picking the right technology.

Beyond the time-saving and efficiency benefits of automation, marketing automation enables essential business processes for any modern marketing department.

This can include lead nurturing, lead scoring, lead lifecycle management, personalization, and analytics. So, how do you select the right solution for your business? Depending on your business objectives and goals, there are different solutions available to suit your needs.

Here is a process to help you find and buy the right marketing automation solution for your company:

An example purchase process.

Step 1: Define a timeline. Are you switching tools, or are you starting fresh? Does this need to align with a product launch? Are there other factors to account for, such as integrations or additional stakeholders?

Step 2: Develop requirements. How many leads will you generate? Will you need to plug into third-party providers? Will you need strong nurture capabilities? How much segmentation will you be doing? What level of reporting do you need? What are your goals?

Step 3: Define users and teams. Will there be a centrally managed team doing all the work? Will you have agencies needing access to the system? Who builds the assets? What restrictions will exist for those who aren't admins?

Step 4: Align different vendors against your criteria in a consistent way. What do some have that others don't? How does pricing align to capabilities, and so forth?

Step 5: Check references and perform other final checks. If you can, be sure to check references with other companies close to your area of work. Sync again with all teams who are part of the process to make sure you've covered your bases. From there, decide what to do.

What to seek in a solution for lead nurturing.

Lead nurturing is a key component to any marketing automation solution. Use this checklist to make sure your vendor has all the latest and greatest lead nurture capabilities.

Your marketing automation solution should:

- Enable operational and communication triggers based on lead or client activity
- Be dynamic, based on individual lead or client (e.g., primary language or region)
- Allow you to nurture prospects and customers online and offline via social media, events, or direct mail
- Give you the ability to limit customer interactions with filter criteria or system-based limits to end the possibility of too many touchpoints
- Offer capabilities of advanced send controls around actions, criteria, timing, interaction, and so forth
- Allow you to communicate to customers at the right time and in the correct stage. It should be adaptable to communication use cases other than just email
- Allow you to score leads based both on demographic and interactive points
- Be easy to use and implement, with training materials and dedicated support for the tool
- Provide predictive web content using artificial intelligence (AI) to serve up dynamic content that is relevant to the viewer
- Have full account-based marketing (ABM) functionality for selecting and prioritizing accounts using AI and delivering relevant messages across all channels

Your solution should also simplify content management. For example, it should:

- Allow you to add new content simply by dragging and dropping it into the workstream
- Be intelligent enough not to send the content to those who have already received it
- Know if someone downloaded content through another channel
- Activate content automatically for limited-time events and special offers at the right time
- Remove content for limited-time events and special offers when that event is over
- Help measure intelligently which content asset is performing best

Adobe Marketo Engage sends prospects and customers the best message and the best piece of content automatically and intelligently based on who they are, what they have seen in the past, and their behaviors.

You simply drag content into a stream—our version of a track, which can be thought of as a conversation—and the system automatically manages the timing and sending of the right content to the right person at the right time.

The system also takes outdated content out of rotation in a particular program, and it will warn you in advance when there isn't any more content available to continue the conversation.

Nurture as part of your overall marketing strategy.

When creating your lead nurturing strategy, don't think about nurture in isolation. Think about how nurture fits into the other marketing communications you send.

You can't think about lead nurturing in a vacuum. You need to look at your entire marketing calendar to determine what other communications your leads receive. You might be sending newsletters, product updates, database emails, and other cross-channel communications. How are these interactions working together in harmony? You want to deliver coordinated and relevant customer experiences across all the channels your buyers use.

Communication timing

How often you send lead nurturing communications, particularly email, needs to be reconciled with how often you hit your database with other communications. The first step to getting this right is to determine your overall communication cadence. How often are you engaging with the contacts in your database? Meet with stakeholders in your organization to decide what this number should be. Be sure to test and iterate this over time to determine the correct number of touches based on your results.

Consider the length of the buying process and the communication approaches used. The timing of your lead nurturing programs is impacted by the length of your average buying process and the approaches you use for lead nurturing (email, direct mail, phone, and so on).

In the following example, let's assume a prospect downloads a white paper from your website, and your lead scoring methodology deems this individual a lead nurturing candidate. If the buying cycle for your product is three months, the nurturing path for this specific prospect might look like this:

- Day 1: Website personalization persona-based offer
- Day 10: Follow-up with intro email
- Day 15: Email offering new content related to first download and subsequent website activity
- Day 30: Personal email from sales rep
- Day 45: Email best practices white paper
- Day 60: Social campaign on email best practices
- Day 75: Website personalization and banner ads to promote webinar series
- Day 85: Personal email from sales rep offering a product demo
- Day 90: Personalized ad on Facebook using targeting

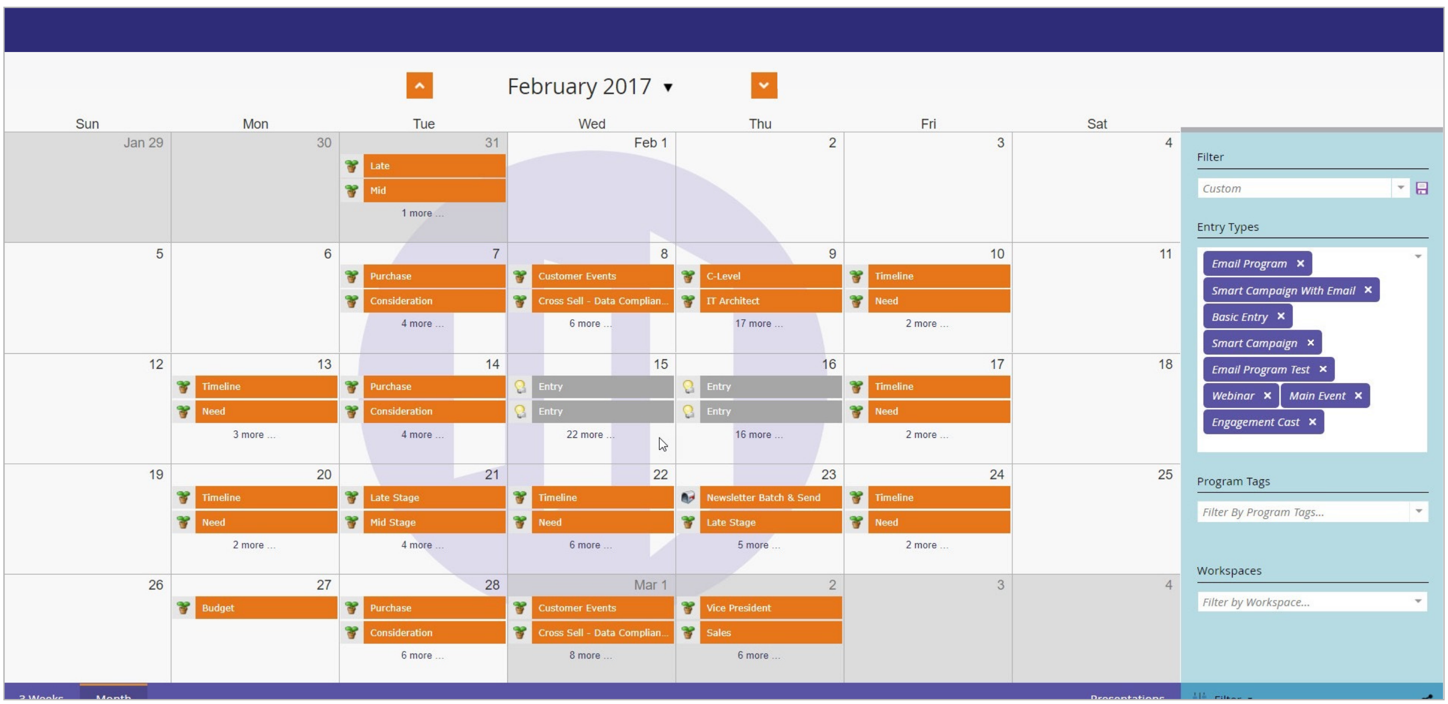
Marketing calendars

You need a way to see all your campaigns in one place—so you know exactly what database email and nurture campaign sends are going out in any given week.

A marketing calendar, like the one shown here, is an ideal place to ensure you're not overmarketing to the same people.

We use our solution's marketing calendar to get a holistic view of all communications with our database across the entire marketing department—we can see event invites, nurture emails, demand generation emails, and more.

With this holistic view, you can see exactly who is being communicated with and when.



Comvita watched lead conversion soar.

- A 480% increase in new lead conversion in 6 months of using Marketo Engage
- Average sale value up 255% when part of a lead nurturing campaign
- Email marketing is now the second highest revenue generator of all online activities
- Nurtured leads have the highest conversion rates of all online activities

Challenges

Comvita is a global company with a vision for preventive and holistic health. Before this, Comvita used a content management system with a built-in email tool, which allowed it to send emails and determine if those emails had been read. Unfortunately, it did little else. Comvita had no way to differentiate between a new lead, someone who had purchased from Comvita before, and those who were already loyal customers. Every contact received the same content: a monthly promotional email.

In addition, the previous solution was not easy to use, making communications difficult to send and offering almost no insights. Comvita couldn't even identify its most loyal customers. Because the holistic health industry requires vast communication to educate consumers about the science and credibility of products, the previous solution put Comvita at a distinct disadvantage.

Solution

Comvita was able to implement Marketo Engage and send out their first campaign in about six weeks. The first focus was simple: lead generation and sales.

With Marketo Engage, Comvita could determine that their average conversion time was three months for a B2C customer. Comvita leverages Marketo Engage to accelerate the sales process with nurturing streams and more targeted, specific content. Now, Comvita knows whether customers are likely to purchase again and how soon, and the brand can even talk to customers about the products they are interested in.

Benefits

In only six months of using nurturing features in Marketo Engage, Comvita has seen a 480% increase in new lead conversion and a 255% increase in sale value when leads are exposed to nurturing. Email marketing at Comvita is now the second highest revenue generator of all their online activities, and Marketo Engage lead nurturing has one of the highest conversion rates for online activities.

DECIDE TO NURTURE.

Defining what a lead is for you.

To build your lead nurturing strategy, you need to start with the basics. Every organization has its own definition of a good lead. In our own revenue cycle, a lead is "a qualified prospect who is starting to exhibit buying behavior."

Sales and marketing lead alignment

To define the perfect lead for your organization—so you can determine which leads should be nurtured and which should not—you need to come up with a joint lead definition agreed upon by sales and marketing.

Here is a simple checklist that can help:

- Schedule time with sales and other involved parties to define target markets, database design, leads available to sales, and characteristics of closed leads.
- Define scoring procedures and what constitutes a high-value action versus a low-value action, as well as what constitutes a high-value demographic or attribute versus a low one.
- Set regular meeting cadences between sales and marketing to continue to iterate, test, and adjust SLAs based on insights.
- Create service-level agreements (SLAs) around lead handoff to sales and communications. Define the full-journey process from won and onboarded all the way through to the lost stage.

A look at lead scoring.

Lead scoring is the shared sales and marketing methodology for ranking leads in order to determine sales readiness. By scoring leads based on their interest in your business, their current place in the buying cycle, and their demographic fit, you get a better idea of where each lead is in the buying cycle and can segment and nurture accordingly.

Companies that use lead scoring see a huge lift in ROI, and their sales teams spend less time selling and more time closing deals.

To create a lead scoring strategy, your sales and marketing teams need to work together to determine what scores should be assigned to which actions. This can be based on business priorities and buyer readiness and is intimately connected with your definition of a lead.

There are three dimensions of lead scoring that help to determine who you should nurture and who gets fast-tracked to sales—lead fit, lead interest, and lead behavior.

1. Lead fit

Determining lead fit, or explicit lead scoring, is based on observable or directly shared information—often collected via an online form or registration process. Demographics, firmographics, and BANT (budget, authority, need, and time) tell you how well a prospect fits your buyer profile.

Demographics: When profiling and defining your leads, you need to look at demographics—quantifiable identifiers that characterize your lead population. You can then take these demographics and create lead nurture tracks that map to them.

Typical demographics might consist of:

- Title
- Role
- Location

Firmographics: Firmographics are organizational characteristics that help you find your ideal customer.

Typical firmographics might consist of:

- Name of company
- Company size and location
- Revenue
- Number of divisions
- Number of products or services sold
- Geography served
- Industry
- Products already owned

2. Lead interest

Scoring lead interest, often called implicit lead scoring, is done by tracking your prospect's behaviors (e.g., online body language) to measure their level of interest in your product or solution. Interest scores tell you how attractive you are to a potential customer. Implicit lead scoring can also mean inferring additional information about a prospect based on the quality of data you have—like the location of an IP address.

Anonymous leads

How do you nurture and score anonymous leads? Anonymous leads are buyers that interact with your content or website before you have their data.

With personalization tools and marketing automation, you can actually identify attributes about anonymous visitors to your site.

Personalization software enabled on a website can detect the following information:

- Company size
- Server's IP address
- Industry
- Company size
- Revenue
- Page visits
- Geolocations
- Referral sources
- Search terms
- Browsing details

3. Lead behavior

Interest and fit are not enough. You need to track additional factors, such as behavior, that will indicate timing.

This will help you to determine whether someone is an early-stage prospect who is just looking to be educated or entertained—or an active lead who is considering a purchase.

You can track these by asking the lead directly or through implicit factors. For example, we have found that there are some behaviors highly correlated with prospects moving into a buying cycle. Check out the example chart here for a detailed view.

By scoring and identifying active buying behaviors, you can be more relevant when you nurture and follow up with your leads. If someone has a high score but low buying intent, you know you need to be more educational in your nurturing—but if someone has high buying intent, they can be fast-tracked to sales and not nurtured at all.

A look at lead scoring.

Passive behaviors (engagement)

- Early-stage content ***+3***
- Attend webinar ***+5***
- Visit any web page or blog ***+1***
- Visit careers pages ***-10***
- Decay inactivity ***-1, -5, -10***

Active behaviors (buying intent)

- Pricing pages ***+10***
- Watch demos
  - Overview ***+5***
  - Detailed ***+10***
- Mid-stage content ***+8***
- Late-stage content ***+12***
- Searches for branded keyword “Adobe” ***+8***

Data augmentation for lead scoring

Sometimes you won’t have all of the data you need to score your leads appropriately—particularly if you are importing a lead list from a webinar or event. Using a data augmentation service like Leadspace can help you fill in the gaps so you can score and segment better. Data augmentation can also be more accurate, as people often lie on forms.

Data augmentation services can help enrich the following data:

- Email
- Role
- Company name
- Social profile information
- Phone
- Title
- Company size
- Technology selection

An overview of list building.

In order to successfully nurture prospects, you need to grow your list of engaged subscribers and collect contact information for your database. According to Moon Marketing, you lose up to 25% of subscribers each year due to email attrition, and not all engaged subscribers will become paying customers. To grow your business and set up a robust lead nurture program, you need to feed the top of the funnel with list-building tactics.

There are many channels and tactics that marketers use to build their email list. Consider building your email list from the following sources:

- Website registration page
- Social media
- Offline events
- Online events
- Purchase or trial registration
- Blog registration page

There are two ways to collect this information through opt-ins:

1. **Ask:** When you give your visitors great reasons to subscribe—news, updates, discounts, content—they'll often gladly give you their email address. Then you can include these contacts in your nurture programs.
2. **Request:** With gated content, such as premium reports or eBooks, an email address is the key that opens the gate.

Opt-ins

Before you can fulfill and maintain expectations with your nurture communications, you must set them. Expectations start with the opt-in. A smart opt-in process sets an accurate and positive notion of what's to come and how it will arrive.

There are various tactics for building your list of opt-in email addresses, but in general, they fall into one of the following categories:

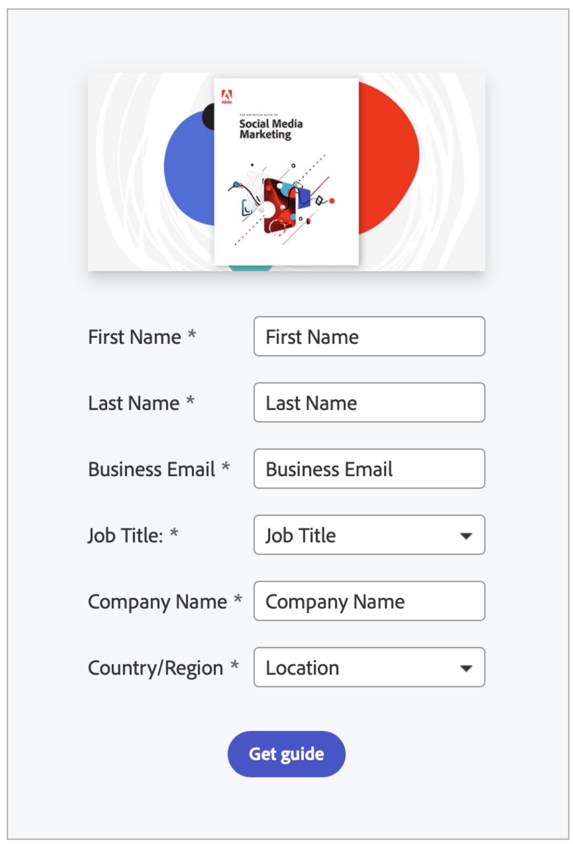
Single opt-ins

A single opt-in works when a new subscriber enters their email address and possibly other information (demographics, preferences, etc.). They are immediately subscribed and will automatically receive the next email in your nurture campaign based off what you learn from the opt-in form.

Implicit opt-ins

An implicit opt-in occurs when a website visitor fills out a form on your site to download a content asset or register for a webinar. Your website's privacy policy must state that performing this action automatically opts users into email marketing. This option is low effort, but it also has the lowest level of engagement.

Here is an example of an implicit opt-in on our website for downloading one of our definitive guides:



Explicit opt-ins

Explicit opt-ins require the user to voluntarily sign up for email marketing. Often this takes the form of a registration box or page that reads something like "I want to receive news and updates."

Explicit opt-ins indicate additional engagement as a subscriber requests information explicitly. Here is an example of an explicit opt-in on our blog:

The General Data Protection Regulation (GDPR) makes it a legal requirement to have explicit opt-ins.

Confirmed or double opt-ins

A confirmed or double opt-in occurs when a new subscriber enters their email address and (depending on your needs) other information and content preferences. A post-subscribe thank-you page may alert them to look for an email confirmation. Once they receive the email, they'll need to click on a link or button to confirm.

Note: Please keep in mind that these options can also be dependent on legislation, such as GDPR or California's or California's anti-spam laws.

List maintenance

It's not enough to simply build a list for lead nurturing—you must also maintain it. This means letting subscribers manage their preferences and opt out if they wish.

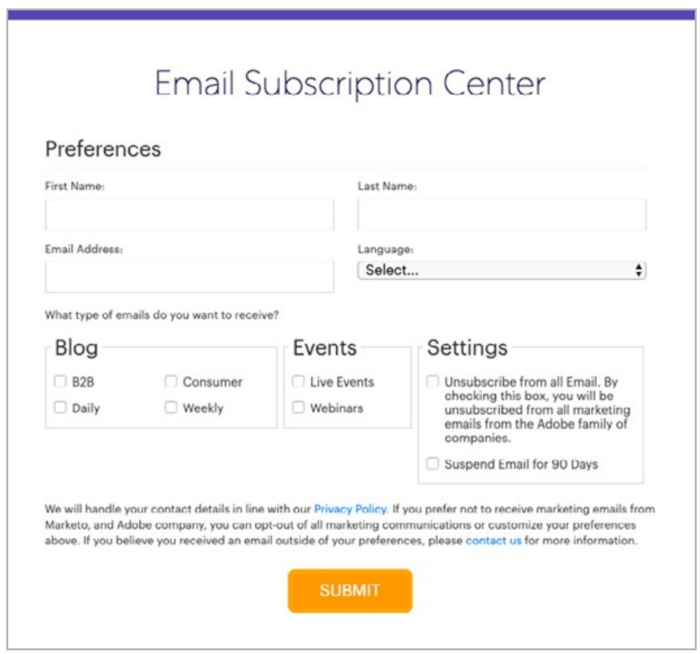
Subscription centers

One of the best ways to establish trust with your audience is to allow them to take control of communications—they should never feel trapped. You can be smart about your opt-out by creating a subscription center on your website. When subscribers click "unsubscribe," they will be taken to the center and given the option of changing their communication preferences (hopefully they still like you—they just want to see less of you).

Most subscription centers are fairly bare, asking for only the subscriber email and the reason they have opted out. However, you can also give subscribers other options, such as:

- Showing a list of current subscriptions or other subscription details
- Including customizable preferences like checkboxes that make it simple to change options
- Offering the ability to pause for a period of time when subscribers just need a break
- Adding an opt-down feature that lets subscribers receive fewer—but not zero—emails

At Adobe, we allow subscribers to choose which channels they subscribe to, unsubscribe from, or simply pause for 90 days—and we take these selections into consideration for our nurturing tracks.



DECIDE WHO TO NURTURE.

Keeping your database healthy.

Having a clean database is critical to your lead nurturing success. According to Robert Pease, former CMO practice lead for Heinz Marketing, "The accuracy and effectiveness of the information available to you that is used to engage prospects through the buying journey is extremely important and requires constant attention to keep up to date."

Josh Hill, senior director of lead lifecycle management at RingCentral, recommends taking the following steps to maintain a healthy database:

Give your leads a checkup.

In order to maintain good database health, you need to give your leads a checkup continuously. You need to make sure you are close to your leads—know exactly where they are coming from, as well as how they are getting into your database.

Here are the top reasons to keep your database clean:

Segmenting leads better, which lets you focus your message on the right people at the right time, is key for lead nurturing.

1. Avoid duplicate sending of emails.
2. Accurately report to your executive team.
3. Ensure you don't hurt pending deals by emailing the wrong marketing material to key prospects during a sales cycle.
4. Too many old, bad, and duplicate leads might push you over your pricing threshold in your marketing automation or customer relationship management (CRM) system.
5. Personalization that goes wrong—incorrect info within your email.

Identify duplicates.

Duplicate leads in your database are an inevitable problem. It's important to proactively scrub your data on a regular basis and make sure to eliminate duplicates as they come in. Luckily, your marketing automation solution should have rules for automatically deduping lead records. Just make sure you do not mass delete leads.

Check for uniformity.

Uniformity is critical to a clean database—but this is challenging. For example, if you let leads type their country of residence instead of choosing from a drop-down menu, you might collect inconsistent results. Residents of the United States might write "US," "U.S.," "USA," "United States of America," and so on.

Eliminate junk contacts.

It's common to get incorrect information when a lead fills out your form. Some anonymous leads will write in abcd@gmail.com or other such fake email addresses to avoid sharing their real contact information. You don't want these leads dirtying your database, so run campaigns in your marketing automation tool to identify records with bogus contact information automatically. Then you can delete, blacklist, or suspend these contacts if needed.

And when it comes to competitors, many will subscribe in order to learn the ways you market to your customers. You may not want to market to these folks. Sit down and have a conversation with your team to decide your strategy for competitor leads.

Oktopost

Oktopost boosted effectiveness and conversions.

- **80% of conversion** from lead to paid via zero-touch strategy using Marketo Engage nurturing
- **50% open rate** per email campaign—a major increase using Marketo Engage
- Ability to synchronize sales and marketing
- Intelligent lead scoring capabilities, improving sales and marketing efficiency
- Accelerated campaign creation, execution, and increased results via lead nurturing
- Increased win rates and velocity over sales

Challenges

Oktopost, a B2B company offering a social media management platform, is riding the crest of the social media wave and helping customers bridge the gap between social media, content marketing, and lead generation.

As a lean startup, one of the key challenges is the ability to align sales and marketing. Before this, the marketing team was manually processing and running marketing email campaigns and all lead generation activity. They needed to ensure the sales team was aware of which leads were warm and when to move them along in the sales cycle.

Solution

Marketo Engage has been instrumental in the Oktopost success—increasing revenue and lead flow significantly, enabling the company to make better informed decisions.

"Implementing a zero-touch strategy has been something we were looking to do, and we can now see that 80% of the conversions we have from lead to paid have been in zero touch—solely based on the automated nurturing process from Marketo Engage," said Mark Lerner, director of marketing. "In addition to the lead scoring and nurturing, analytics have uncovered where leads come from and enabled us to measure the effectiveness of specific programs."

Oktopost has seen a 15% increase in lead-to-conversion rates since using Marketo Engage. Acquisition costs have decreased significantly, while the lifetime value of a lead is increasing. Velocity over sales, both in terms of the amount on a month-by-month basis and from each individual sale, has increased significantly as well.

MANAGE LEAD NURTURING ACROSS CHANNELS.

Nurturing in a multichannel world.

Today's consumer moves seamlessly—sometimes even quickly—across digital and offline channels. They jump from email to social media to your website and then back to social media without losing momentum. And they do this from whatever device is most convenient at the moment.

The modern, digitally empowered buyer is channel-agnostic. This new buyer has become the undisputed controller of their relationship with your brand. Now more than ever, the customer is in charge. Before we jump into more details on creating your lead nurture content and plan, we wanted to address how to think about nurture with a cross-channel lens.

As a marketer, you need to think across channels in your lead nurturing. Through advanced lead nurturing technology, like the customer engagement engine, real-time personalization, and other tools in Marketo Engage, you can listen and react across various channels.

Multichannel marketers need tools to help them:

- **Listen**: pay close attention to buyer behavior across channels to create a single integrated buyer persona view.
- **Act**: manage, personalize, and act on conversations with buyers across multiple channels.

Listen

Imagine you had a great phone conversation yesterday with one of your best customers about a new service offering. Now imagine that after you read this, you go out for a cup of coffee and run into him on the street. "Hi! So glad we bumped into one another," you say. "I want to talk to you about a great service we're offering." Your customer responds with a puzzled look. They think you have a terrible memory or that you're confused.

The same thing happens when a customer receives dueling messages from you on different marketing channels. If you're not listening across different channels, you're not delivering an integrated experience. To create relevant interactions with a buyer over any channel, it's imperative to understand their behaviors across all channels—you need a single cross-channel view of the customer.

Act

Engaging conversations with buyers should be maintained seamlessly as your subscriber moves from one channel to the next. A conversation you start in an email must continue when the buyer navigates to your website, and it shouldn't skip a beat when they jump over to your Facebook page. Instead of competing against each other with disconnected messaging or repeating information your buyer has already absorbed, your email and marketing channels should work together to coordinate the customer's experience.

Let's take a look at examples of how to integrate a multichannel approach into your lead nurturing efforts.

Web

Your website is of course a great place to capture new email addresses, but it's also a fantastic place to start and continue conversations. The web experience can and should be personalized dynamically to reinforce and extend the dialogue started in emails. Using personalization software like Marketo Engage allows you to:

- Identify a person's relevant attributes—intent, behavior, and profile
- Customize that person's online experience by presenting the most relevant content

Anonymous leads

As we mentioned in the last section, you can use personalization tools to discover information about anonymous leads. But nurturing those leads with relevant content that is seamless with your email communications can be tricky.

Once your personalization software discovers demographic and behavioral details from your leads, it looks for preset marketing campaigns that match the visitor's data segment. This campaign is initially created by you, the marketer, and should be consistent with the nurture campaigns you set up for various segments. If a match is found, the appropriate campaign is launched. Automatically, the text, banners, calls to action, and images dynamically change, instantly creating a more personalized, seamless experience.

Your personalization software then sends data directly to your marketing automation platform, and it can send triggered, targeted email campaigns and scoring updates based on how that lead interacts with your personalized campaigns.

Persona- and account-based marketing

With personalization, you can target both personas and accounts. With account marketing, your organization can focus on a group of accounts with similar attributes that are either most likely to generate revenue or strategically important to your organization. Using personalization tools to refine your account-based marketing approach, you can nurture high-value accounts through their decision-making process with a mixture of web content and email.

When someone comes to your website from a strategic account, you can change messaging, images, content, and logos to make an experience that is completely personalized and relevant.

Retargeting

Some companies are including a retargeting pixel on their website and in the emails they send to prospects and customers (including emails sent by individual employees). This sets a cookie on the subscriber's machine, which allows the company to target specific display ads to them as they navigate the web. If done well, it can create more coordinated experiences between the messages seen over email and online.

Social

Social is a critical part of nurturing across channels. Running social campaigns is great, but making every campaign social is better. Think of social as an ingredient in the campaign cake, rather than just the frosting. When you connect your lead nurturing to your social efforts, they enhance one another.

Combine email and social media

You can combine your email lead nurture campaigns and social media easily in the following ways:

- Social connecting: use email to grow your social followers.
- Social sharing: use email to extend the reach of your message through social channels.
- Social promotion: use social to grow your email list and promote your email marketing efforts.

Direct mail

Consider adding personalized direct mail to your lead nurture campaigns to further personalize and add a human touch. There are solutions available that integrate with marketing automation platforms that make it simple to create highly personalized email.

Imagine sending a fun, unique, and personalized package after a lead has interacted with your nurture communications. Adding that human touch can accelerate your leads and help build trust.

Including a PURLs

PURLs are personalized URLs. Leads type a custom URL into their browser from a postcard or package they receive in the mail. This address brings them to a landing page designed specifically for their persona. By offering them targeted web content in this way, you can improve conversion by 30% or more.

Sales involvement

Don't underestimate the power of personal contact when it comes to lead nurturing. Cross-channel communication is great, but adding that human touch is a powerful way to accelerate the sales cycle. A call from your sales reps should be an integral part of every nurture campaign. Here are a few steps to get you started.

Knowing who you're calling

This is the most important aspect of including a sales call in your lead nurturing campaigns—you must know who you are calling and what their past experience has been with your company. Make sure you research your buyer and check your CRM system and marketing automation database to ensure your conversation is relevant and consistent with the other communication your company has had with them.

Your sales rep should be asking:

- Who is this lead?
- What do they know about my company already?
- What communications have they received from my company to date?
- Do they fit our ideal customer profile?

Mobile

Not only are today's buyers multichannel, they're also multidevice. Because mobile is an area where your buyers spend a lot of time, you need to think about how you can include a mobile experience in your lead nurturing programs.

Make sure all your nurture email content is responsive, including your emails and landing pages. That ensures your customers can see and interact with your nurture emails on their mobile devices.

CREATE AND DELIVER ENGAGING CONTENT.

Defining your content strategy.

Having a well-planned content strategy can increase the effectiveness of lead nurturing by delivering compelling content to each persona at just the right time.

A comprehensive strategy should be driven by data, using metrics from your marketing automation solution to determine which types of content are the most engaging for each persona at each stage of their journey.

You should consider search engine optimization (SEO) in your strategy, so each new content asset you create improves your organic search rankings. You should also write high-volume search terms into your content.

Content creation can be more efficient by developing "big rock" assets and dividing them into smaller chunks to serve up one at a time.

Your metrics solution should be able to attribute buyer activities and revenue to specific content assets, so you can learn what works and what doesn't.

Align content formats to the customer buying cycle.

Each stage of the buyer's journey calls for certain content formats to engage buyers with the right content at the right time, so they come to trust your brand and ultimately make a purchase.

According to SiriusDecisions, these content formats work well at each of these stages:

Thought leadership to loosen the status quo:

- Articles
- Social media
- Newsletters
- White papers
- Blogs

Solution knowledge to commit to change:

- Events
- Webinars
- Websites
- Self-guided demos
- Analyst reports
- Product collateral

Value stories to explore possible solutions:

- Sales presentations
- In-person demos
- Case studies
- Internal blogs

Solution differentiation to make a commitment:

- Trials
- Proofs of concept
- Competitive tools
- Subject matter expert (SME) access

Financial justification to confirm the decision:

- ROI tools
- Total cost of ownership (TCO) tools
- Business cases
- Financial presentations

Decision validation to make the selection.

- Executive briefings
- Analyst reports
- Customer references

Apply the 411 rule.

You'll find that nurturing your buyers means maintaining the careful balance between helpful and promotional. To help you negotiate this balance in your story arc, we look at our content mix through the lens of the 411 rule.

This rule, popularized by Joe Pulizzi, founder and CEO of the Content Marketing Institute, states that for every four early-stage, light, and informative content offer you provide, you can have one soft-sell offer (like a third-party review) and one hard-sell offer (like a demo). This rule helps you avoid being thought of as only a great resource and never pushing your buyer through their lifecycle. It helps you balance being helpful and asking for business.

Align content to the customer buying cycle.

Loosening of the status quo	Committing to change	Exploring possible solutions	Committing to a solution	Justifying the decision	Making the selection
Education		**Solution**		**Vendor selection**	
We might have a problem, or we are conceiving a vision.	We understand the problem and how it connects to our business.	Your solution applies to our need.	Your solution will have the greatest impact on our business.	The business case is justified internally.	We are confident in moving forward.
Thought leadership	Solution knowledge	Value story	Solution differentiation	Financial justification	Decision validation
• Articles • Social media newsletters • White papers • Blogs	• Events or webinars • Web site or SEO • Self-guided demos • Analyst reports • Product collateral	• Sales presentations • In-person demos • Case studies • Internal blogs	• Trials • Proofs of concept • Competitive tools • SME access	• ROI tools • TCO tools • Business case • Financial presentation	• Executive briefings • Analyst reports • Customer • References

The types of nurture content.

According to Edward Unthank, founder at Etumos, "The most successful nurture content is a perfect intersection of what your buyer wants to do and what you and your organization want them to do."

Each message must teach and accelerate. Your nurture content must teach your leads something new by providing interesting and relevant content, but through your story arc creation you also must accelerate your leads through your sales cycle using content to nudge them to the next step.

Now that you've thought about your story arcs, let's look at the different types of content you can use to create the right mix for your business.

Original content

Original content is content that you create. It's yours and only yours. You can write this content in house, work with outsourced writers, or commission third-party thought leaders to create exclusive content. Giving your audience original content is a great incentive for them to opt-in.

At Adobe, we create a lot of original content. We publish a daily blog, create eBooks and cheat sheets multiple times per month, and create bigger pieces of content (like this guide) fairly often.

Every new content asset that is created gets added to the appropriate lead nurture program as part of the content promotional plan. Then, the lead nurture manager assesses where it fits into the story arc and adds the new content to a track and stream.

This is an example of an original content lead nurture email from one of our own tracks highlighting our *Definitive Guide to Account-Based Digital Advertising*.

Content curation

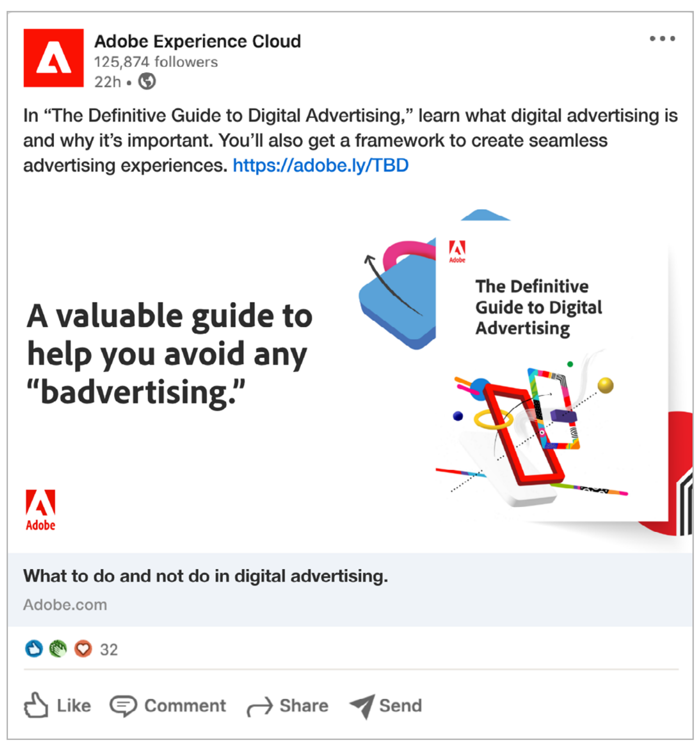
The primary goal of nurturing is to stay connected with the potential buyer. As long as you're hyper-relevant, you're accomplishing this goal. A nurture interaction doesn't always need to be about an eBook. In fact, it doesn't even need to be about something you wrote. Consider including content curation in your nurturing. This is when you collect, organize, and display relevant content, and it can be an important part of your lead nurture strategy.

Content curation is successful in emails as well as social interactions. If you are using content curation in emails, make sure your email topic is of interest to the receiver and your curated articles are high quality.

Content curation for social is particularly effective, since you can use curated content to practice the 411 rule previously described.

User-generated content

Asking your community to help create content can inspire your creative team and engage subscribers. Social media is perfect for this. You can send an email that links to a poll you created on Twitter or Facebook and then post the results of the poll in another email. Community content can also come from blog comments, customer testimonials, and reviews. It helps lend authenticity and build trust in your user community.



CREATE AND DELIVER ENGAGING CONTENT.

The anatomy of a lead nurture email.

Email is a critical part of your nurture programs. Your lead nurture emails need to incorporate the right elements. Not only should your emails offer the right mix of content at the right time, they also need to consistently help your buyers save money, solve a problem, educate themselves, or be entertained.

Of the emails you send and receive, you'll notice there are standard types:

Promotional

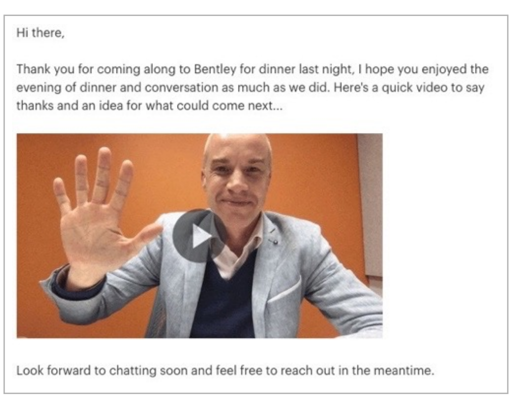
These emails are meant to stimulate an action (purchase, registration, usage, and so on). As an example, take a look at the email a bit later on this page, promoting a "Brunch and Learn." The action we're looking to stimulate is to RSVP to the event.

Alert

Alerts offer convenience. They're emails triggered by a certain event, such as the one you receive when your flight is delayed or when someone asks to connect with you on LinkedIn.

Relationship development

This is the most common type of lead nurture email. It's meant to simply build and maintain a relationship over time. As an example, look at a standard late-stage nurture email on this page. It's designed to maintain a relationship in the late stages of nurturing and say thank you to a lead who attended an event.



Hi there,

Thank you for coming along to Bentley for dinner last night, I hope you enjoyed the evening of dinner and conversation as much as we did. Here's a quick video to say thanks and an idea for what could come next...

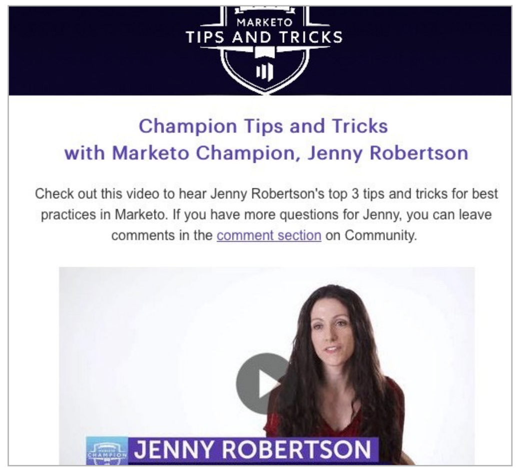
Look forward to chatting soon and feel free to reach out in the meantime.

Communication

These emails send updates or communicate other types of information (e.g., a newsletter).

As an example, look at the nurture email on this page about Champion Tips and Tricks.

This email communicates information within the email itself without an additional call to action.



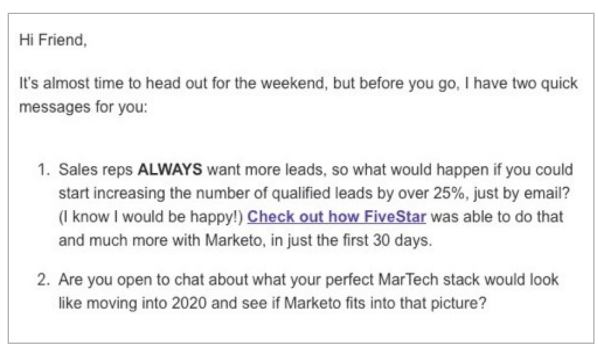
Champion Tips and Tricks
with Marketo Champion, Jenny Robertson

Check out this video to hear Jenny Robertson's top 3 tips and tricks for best practices in Marketo. If you have more questions for Jenny, you can leave comments in the comment section on Community.

Reminder

These are "nudge" emails sent to a subscriber who has abandoned their online shopping cart. For example, Groupon uses this method to remind users of unredeemed coupons.

The example on this page sends a quick reminder to schedule a call with a sales representative to learn more about how Marketo Engage fits into their martech stack.



Hi Friend,

It's almost time to head out for the weekend, but before you go, I have two quick messages for you:

1. Sales reps **ALWAYS** want more leads, so what would happen if you could start increasing the number of qualified leads by over 25%, just by email? (I know I would be happy!) **Check out how FiveStar** was able to do that and much more with Marketo, in just the first 30 days.
2. Are you open to chat about what your perfect MarTech stack would look like moving into 2020 and see if Marketo fits into that picture?

CREATE AND DELIVER ENGAGING CONTENT.

Email creation best practices.

Email styles vary for each organization and even from campaign to campaign. Your nurture emails will have standard elements, like the subject, from address, calls to action, and so on. But you will need to determine the best practice for your organization.

Subject line

The subject line of an email is one of the first things a recipient sees in their inbox. They are likely to make a snap judgment based on that subject line about whether to open, ignore, delete, or mark it as spam. Subject lines are critical for successful lead nurturing. Your email doesn't matter if no one opens it.

Not every subject line needs to be a literary achievement, but there is power in a subject line that is magnetic.

Let's face it—if you can get a subscriber to open your email eventually, you're doing a good job. But if you can get them to stop what they're doing and open your email immediately, you're winning.

As guidance, we use "the four Us" of subject lines, a very helpful abbreviation inspired from Copyblogger to help determine if our subject lines are ready:

- Useful: Is the promised message valuable to the reader?
- Ultra-specific: Does the reader know what's being promised?
- Unique: Is the promised message compelling and remarkable?
- Urgent: Does the reader feel they need to read it now?

Sender

Like we talked about in the first part of this guide, lead nurturing is really all about trust. You want your buyers to trust communications from you, so that they are always willing or even excited to open them.

Five subject line techniques that work.

1. Educate: "7 things marketers can learn from sales"
2. Ask a question: "Did you miss this?"
3. Announce a sale, new product, or exclusive: "First peek: Our latest definitive guide to engaging content marketing"
4. Offer a solution to a problem: "Pay down your loan"
5. Jump on a popular topic: "The state of social advertising: What's working now?"

In addition to the subject line, one way to create and reinforce trust is with the sender name or the from address. It's a critical factor in a subscriber's decision to open versus delete your email. If a subscriber doesn't recognize you or trust you, they are far less likely to open your email—and they might even mark it as spam.

There are a few options that you can experiment with:

- **Company or brand name:** Lead with the brand name, like Adobe, Apple, or Banana Republic.
- **Product or service:** "Mileage Plus" by United Airlines is used as the sender name.
- **Personal name:** Use the name of a specific employee at your company (e.g., the sales account executive who owns the account).
- **Campaign-based:** Some companies sometimes send nurturing emails from email addresses specifically marked as "nurturing" or "events," so buyers know exactly what to expect before opening.

Email body copy

You got your buyer to open your nurture email—a fantastic first step. But now what? You want your buyer to land on compelling copy that reads quickly and has a clear call to action and value proposition (“What’s in it for me?”).

To check if you deliver this experience, run it by the 30-second summary rule. Can you get through the email in 30 seconds and know what value it provides? This test helps you make sure that your call to action and value proposition are clear and that your copy, whether it’s in bullets or paragraph form, isn’t too dense.

Now that you have a buyer’s attention on the body of your email, there are a few more things to consider:

- Think about the width of your email—the most common width is 600 pixels.
- Remember that rich media, like Flash, JavaScript, and video won’t work in an HTML email.
- Focus on what will and won’t appear above the fold for a user on their display, whether that’s desktop, laptop, or mobile.
- Consider experimenting with styles of emails—sometimes heavy text works better than a beautiful visual.
- Provide a plain-text version always for buyers who don’t like or accept HTML versions.

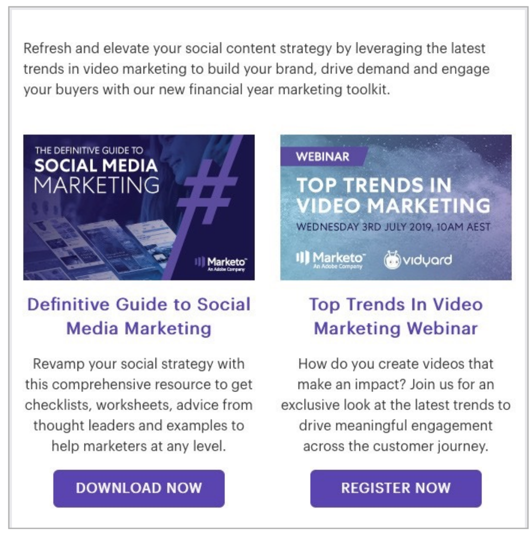
In this example, our nurture email has two very clear calls to action. The reader easily understands how to download *The Definitive Guide to Social Media Marketing* and register for our *Top Trends in Video Marketing* webinar.

Design

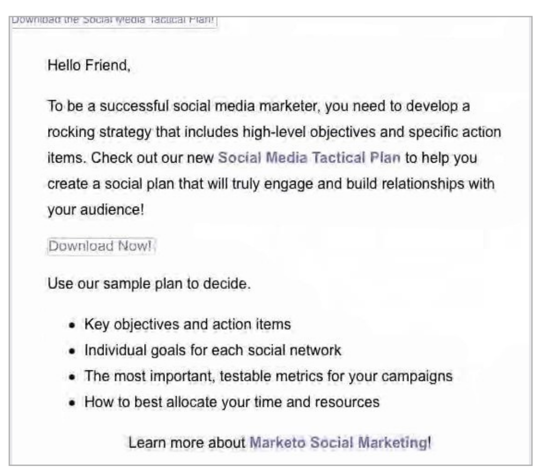
The design of your communication is heavily related to the images that you include in your email. Today, as a security precaution, most email clients block images by default, so users need to choose to unblock images if they want to see them. Ideally, your buyer trusts you enough to always allow your images, or actively chooses to unblock them each time. Regardless, there will still be a few recipients who see your emails without images.

There are a few ways you can prepare for this and make your communication easier to read.

- Create bulletproof buttons. These buttons look like images but are cleverly formatted HTML. The buttons ensure that subscribers will see the most important points of your email, regardless of whether they’ve blocked images.
- Use image alt tags. These tags let users who have blocked images know what they are missing.



In this example, we use alt tags that clearly show the reader what images they are missing. We’ve also formatted the HTML to look like buttons—note the “Download now” and “Learn more about…”



In addition to ensuring images can be viewed on all devices, your email design should also be clean. Too much clutter causes reader confusion and risks your email being sent to spam. Your emails should always be clean and concise. They should have a header, a hero image, and include a short block of copy.

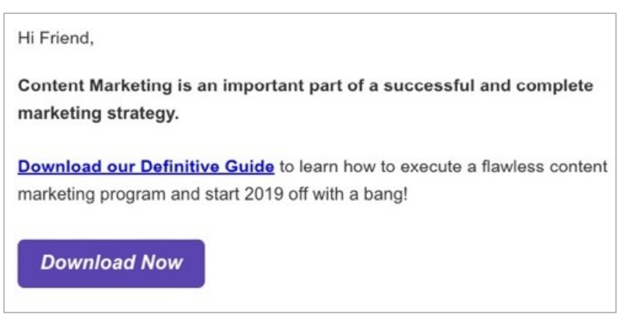
Call to action

Calls to action, or CTAs, live in the body of an email and draw the buyers' attention to the action that you want them to take. Some experts say that you should only include one CTA in your email to not divert your buyer's attention, while others maintain that having two CTAs ensures that there is something for everyone. We believe there is no right answer—it depends on your organization's audience, the offer, and what you have learned via testing.

CTAs can be a button, hyperlinked text, an image, and so on. Essentially, it is an element of your email that you can edit and test, similar to subject line and sender. Your CTAs should always be bold and obvious. In communication with a CTA, you want to ensure that the buyer takes your recommended action.

Take a look at the following email example to download our *Definitive Guide to Engaging Content Marketing*. The reader knows what the email is about and what they should do.

Tip: Not every email needs a CTA. Lead nurture should educate, entertain, and keep in touch with buyers. Consider that a portion of your content mix should just add value and not include a CTA.



Hi Friend,

Content Marketing is an important part of a successful and complete marketing strategy.

Download our Definitive Guide to learn how to execute a flawless content marketing program and start 2019 off with a bang!

Download Now

Mobile optimization

Unfortunately, despite the landslide of evidence that supports the necessity for marketers to adapt and be mobile friendly, many haven't.

As you develop a successful lead nurturing program, be sure that you build this capability into your program, as it will only become more and more important over time.

There are a few different ways to develop a mobile-friendly email, and we'll cover them briefly here:

Scalable design: Good for beginners and teams with limited resources—it's a design that works across desktop and mobile and doesn't require code to adjust image and text sizes.

Fluid design: This design works best with text-heavy layouts that flow. It requires some CSS knowledge because of width limitations, but it still works for teams with limited resources.

Responsive design: This design includes everything from the two styles above and then adds control with more CSS media queries, allowing you to design for specific screen sizes. It offers the most control, but it also requires more resources.

Ultimately, you need to consider your audience and your resources when you decide which level of mobile-optimized design is best for your organization.

IMPLEMENT BASIC LEAD NURTURE SEGMENTATION.

The importance of segmentation.

Segmenting your audience, the act of dividing your leads into definable and actionable parts, is essential to your marketing success—particularly with lead nurturing. The more you segment, the more relevant your lead nurture programs will be. If you fail to remain relevant, your audience simply won't pay attention.

According to our proprietary engagement score (which tracks how engaging an email is in Marketo Engage), 23% of how engaging an email is can be explained by segmentation. Smaller, more segmented sends in your lead nurturing yield better results.

The two dimensions of segmentation.

We recommend that your basic lead nurturing programs use two dimensions of segmentation—the buying stage crossed with another measurement variable that is important to your business. The reason there are two is because it creates a happy balance: one is not enough, and each dimension beyond two creates an exponentially more complex framework. Think of it as segments and subsegments.

At Adobe, we focus mostly on buying stage and buying profile as our two main dimensions. Here's an example of how we think about a basic nurturing segmentation:

1. Buying stages

- **Early:** Be a better marketer
- **Mid:** Why marketing automation?
- **Late:** Why Marketo Engage?
- **Customer:** Success

2. Buying profiles

- Marketing
- Sales
- Executive

Sample multichannel lead nurture program: Buying stages

- **Touch 1:** Early-stage email—eBook: *What is Marketing Automation?*
- **Touch 2:** Early-stage website offer—Persona-based personalization for Workbook: *Sales and Marketing Alignment*
- **Touch 3:** Mid-stage retargeting ad—eBook: *Choosing Your Marketing Automation Solution*
- **Touch 4:** Mid-stage email—Report: *Marketing Automation Vendor Comparison*
- **Touch 5:** Late-stage sales call
- **Touch 6:** Post-sale customer welcome email with link to onboarding eBook

Dimension 1: Buying stages

Typically, you want to nurture leads based on where they are in their buyer's journey. Content that is relevant to a lead that has just learned about your company is probably not relevant to a lead who is in the final stages of the decision-making process. And remember, relevance is key.

We break our funnel into three parts—top of funnel, middle of funnel, and bottom of funnel. We know where someone is in the process through lead scoring.

Early stage

Top of the funnel (TOFU)

A person in this buying phase is at the beginning of your sales and marketing cycle. They are aware of your product or service, but not ready to buy. Individuals in the TOFU stage should be primarily offered educational materials.

Example content offers include eBooks, blog posts, research data, funny videos, curated lists, and infographics.

Mid-stage:

Middle of the funnel (MOFU)

This buying phase occurs in the middle of your sales and marketing cycle. A person arrives here after they have displayed buying behavior, engaged with your content, and are potentially a sales lead. Your offers for MOFU leads are still educational, but they will be more geared toward your product or service.

Example content offers include buying guides, RFP templates, ROI calculators, and analyst reports.

Late stage:

Bottom of the funnel (BOFU)

This buying phase occurs at the bottom of your sales funnel, and indicates that your lead is close to becoming a customer. Your offers for BOFU leads are very specific to your product or service area in order to support the buyer during the purchase process.

Example content offers include pricing, demos, third-party reviews, and customer case studies.

Dimension 2: Buying profiles

In addition to buying stage as your first dimension, you can also choose a second dimension for your lead nurturing. Choosing a second dimension enables you to be even more relevant to the leads in your database.

Buying profiles and personas

A good place to start when you think about buying profiles is the buying committee—the group of individuals involved in the purchasing decision.

Sample multichannel nurture program: Buyer persona CMO

- **Touch 1:** Early-stage website offer—Persona-based personalization for white paper: *The Changing Buyer and the CMO*
- **Touch 2:** Early-stage email—Report: *Marketing Maturity Curve*
- **Touch 3:** Mid-stage social interaction—Sent tweet for report: *Marketing Automation Buying Trends*
- **Touch 4:** Mid-stage sales call
- **Touch 5:** Late-stage email—Case study: *Sales and Marketing Alignment with Marketing Automation*
- **Touch 6:** Late-stage sales call—Demo request

Buyer profiles are quite relevant to lead nurturing—they help your campaigns target your most qualified segments and add a human element to the relationship-building process.

As you're developing your personas, keep in mind that they must work for the specific purpose of lead nurturing. Think about the characteristics of your audience that would help provide you with greater insight into how to best build a relationship with them. For instance, how do they prefer to receive communications from you (email, mobile phone, Twitter, and so on)?

Finally, identify which profile or role should apply to each new lead. You can use online forms or data augmentation to find out this information, especially if you use techniques such as progressive profiling (e.g., the practice of modifying the fields on your forms to augment the information you already have). You can also observe where your prospects spend the majority of their time on your website. Together, these techniques will help you match the right role-based content with each prospect.

Company size

Many companies segment based on company size. This works particularly well if you are selling to different market segments, like small business (corporate), mid-market, and enterprise.

Competitors

You can also segment your leads based on competitors. You can create lead nurturing tracks that are specific to whether or not a lead uses one of your competitor's products or services. This type of segmentation can be used for new leads or churned customers who went to a competitor. Lead Lizard calls this type of competitor lead nurturing a "win-back track."

EXPLORE ADVANCED LEAD NURTURE SEGMENTATION.

The value of behavioral segmentation.

Adding behavioral segmentation and targeting to your lead nurture campaigns increases relevance and engagement cross-channel. To speak to your leads in a truly relevant manner, you can segment your lead nurturing programs in a way that combines transactional data, like the data discussed in the previous section, with online body language like web traffic, search behavior, email response, and so on.

Behavioral segmentation can be used in addition to segmenting based on the more traditional dimensions. Behavioral segmentation and targeting listens to behavioral cues and creates triggered interactions that feel like a conversation.

When behavioral cues aren't considered, nurturing can be experienced as dissonant interruption. What the sender considers a coordinated "drip campaign" might feel more like a water torture to the receiver.

Behavioral segmentation with Adobe Marketo Engage

Let's take a look at this in action. Rather than anticipate every move that a prospect or customer might take, marketers need to design transition rules. Transition rules tell your marketing automation system what to "listen" for in order to send the most relevant content.

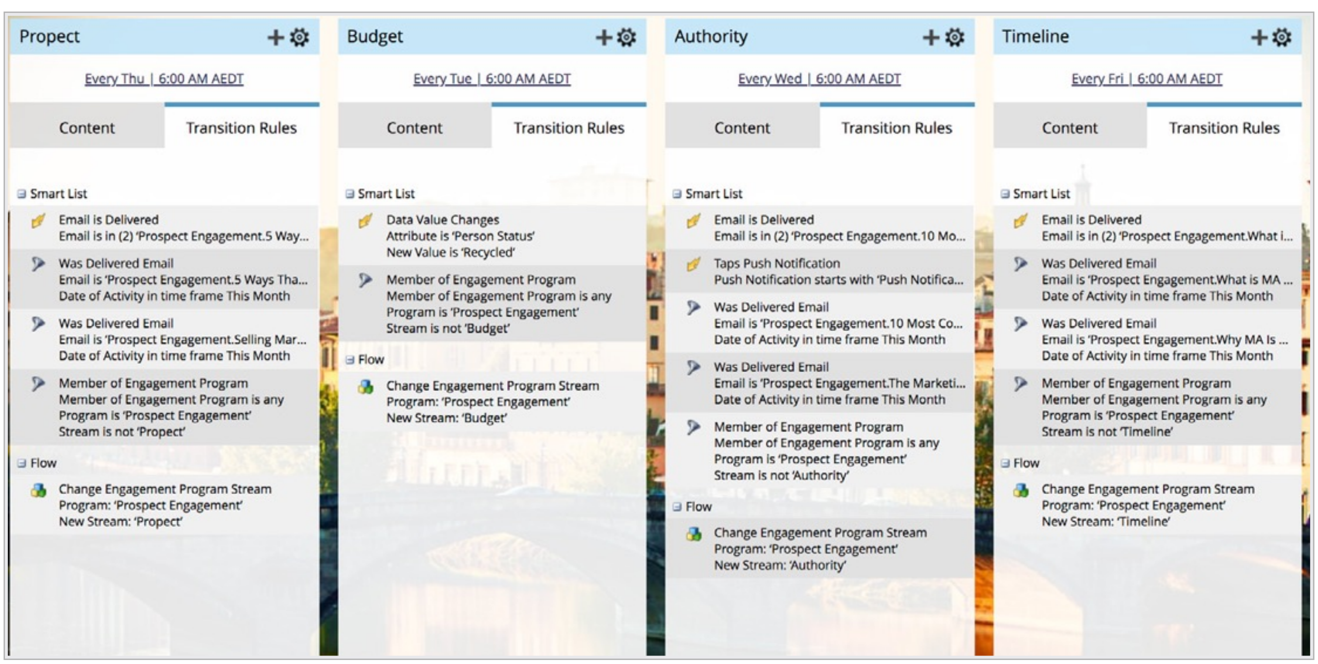
Marketo Engage can pull a lead backward or forward, according to what it hears.

You can determine transition rules based on behavioral triggers—like a change in a lead score. These rules can be as sophisticated or as simple as you want. For instance, if someone visits your pricing page three times within a week, they should be transitioned to an accelerated, more aggressive lead nurture track, where they move through the funnel more quickly.

You can see the transition rules for this track in the screenshot below. We determine when to accelerate a lead based on lead score change, lead status, and other behavioral triggers.

Topic-of-interest lead nurturing

Create even more relevance by instituting a topic-of-interest nurturing track. You might have one lead who is interested in one topic, and another lead who is interested in another topic altogether. By lumping your topics together in one track, you risk a lead becoming disengaged.



Track selection

To put this into action, simply create nurture tracks based on the topics your customers are interested in. At Adobe, we created a track for leads interested in email marketing, social marketing, marketing automation, and Microsoft Dynamics CRM.

For example, if a person attends a webinar on social marketing, we assign them to the social marketing nurture track. Once they are in that interest-based track, they receive a set of social marketing-focused nurture touches. We do this by effectively listening to our potential buyer's behaviors through the customer engagement engine in Marketo Engage.

Testing and proving topics of interest

You have to test and optimize your topic-of-interest tracks to ensure that they are, in fact, the topics that interest your leads the most. Let's take a look at what we found when we tested and measured the success of our topic-of-interest lead nurturing programs.

We found that our topic-of-interest tracks performed better than our standard nurture tracks, resulting in a huge lift. Our open rates had a 57% lift, our click-to-open rates had a 59% lift, and our click rates had a 147% lift. This is the power of behavioral segmentation.

Product interest

An additional type of behavioral segmentation you can implement is product interest. Nurture paths can be created for each of your major product families, so they are relevant to the prospects. This works particularly well if you work at a multiproduct or multiservice company where upsell and cross-sell are important.

A brief overview of specialized campaigns.

In addition to including behavioral segmentation in your lead nurturing campaigns, you can also create specialized campaigns to serve different purposes. Whether it's creating a lead nurture campaign around an event or a season, don't be afraid to get creative with your lead nurturing efforts.

Specialized tracks can be created in addition to your two dimensions. These types of campaigns are great because they are highly relevant and targeted to a specific moment in time, or they help move a lead through your sales funnel at an accelerated pace.

Create special interest campaigns, such as:

- Event nurture campaigns
- Seasonal campaigns
- Accelerator campaigns

Sample multichannel nurturing program: Topic-of-interest social media

- **Touch 1:** Early-stage social interaction—Sent tweet for eBook: *Social Media for Lead Generation*
- **Touch 2:** Early-stage email—eBook: *Tactical Social Media Plan*
- **Touch 3:** Mid-stage website offer—Persona-based personalization for eBook: *Social Marketing and Marketing Automation*
- **Touch 4:** Mid-stage email—Transition asset: *The Definitive Guide to Marketing Automation*

EXPLORE ADVANCED LEAD NURTURE SEGMENTATION.

Looking at late-stage campaigns.

Late-stage lead nurture campaigns maximize marketing's investment in lead nurturing by ensuring that leads never grow stagnant or get lost. As a general lead nurturing rule, there should be no place in the buying process where leads just sit.

Late-stage lead nurture campaigns ensure movement and interaction with prospects throughout the customer lifecycle, even if they're not ready to buy or the sales team doesn't engage.

Here are three important categories of lead lifecycle campaigns:

1. Lead handoff
2. Lead recycling
3. Customer campaigns

Lead handoff

When a lead becomes sales-ready, an automated campaign to pass the lead to sales can make the difference between timely follow-up and no response. There are many ways to let sales know when a lead is ready for them to engage: by loading it into the CRM system, changing the lead's status field, changing the owner or creating a task in the CRM system, or sending an alert over email or SMS.

Lead recycling

As you'll recall, lead scoring is used to determine if a lead is sales-ready according to agreed-upon criteria from your marketing and sales teams. But what happens if sales-ready leads are not contacted, or a rep decides that some of these leads are still not ready to engage?

The importance of lead recycling becomes even more apparent when we consider how commonly leads are lost or ignored by sales upon entering the sales pipeline. In general, there are two types of lead recycling scenarios—one in which leads are automatically recycled according to a set of business rules, and the other in which leads are manually recycled by sales. The goal of the recycling campaign is to reassign—and track—leads that cannot be pursued by sales in a timely manner.

Customer campaigns

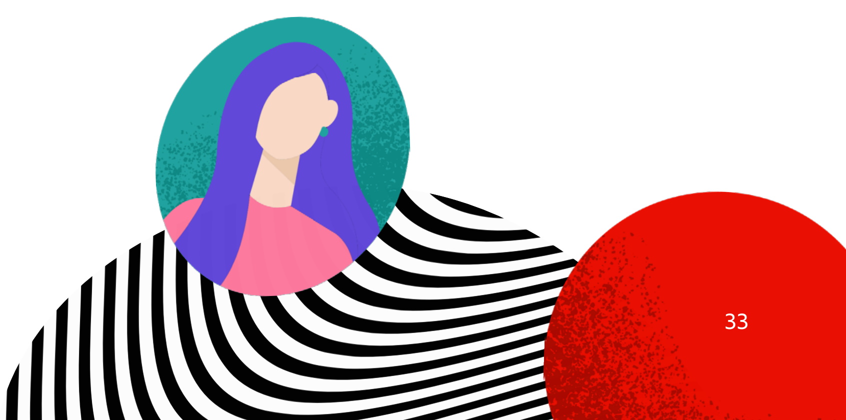
When an opportunity is closed and won, it's a chance to put all associated contacts into a new lead nurture track better optimized for customers. This can include marking them as customers in your database, sending a welcome note, and launching a series of customer-centric emails.

These campaigns are designed to first introduce customers to your products and services, and then over time help upsell or cross-sell additional products and retain them for life.

Customer campaigns should not only include introduction and advocacy emails, but they should also opportunities for customers to interact on social media and your website.

Use these campaigns for onboarding and lifetime engagement. You can help guarantee success early on by educating your customers after their first purchase. And you can empower them to get the most out of your product or service and extend their customer lifetime value.

Customer nurturing is often an area overlooked in lead nurturing. But it's a fantastic way to keep your customers interested and engaged over time. Plus, you can use lead nurturing as an opportunity to tell your customers about the latest and greatest new features, products, or services.



EXPLORE ADVANCED LEAD NURTURE SEGMENTATION.

Create your lead nurture matrix.

The goal of this lead nurturing matrix is to provide you with a resource for structuring your nurture streams and tracks. Segmentation ultimately depends on your organization, but we provide a few different options. We have broken up your early, mid, and late stages to be more detailed—so that you can think about every step in your buyer's journey.

Role

	CEO	CMO	Director	Practitioner
Loosening the status quo				
Committing to change				
Exploring possible solutions				
Committing to a solution				
Making the selection				

Company size

	Small	Mid-sized	Enterprise
Loosening the status quo			
Committing to change			
Exploring possible solutions			
Committing to a solution			
Making the selection			

Geography

	Europe, the Middle East, and Africa (EMEA)	Japan	South America	United States
Loosening the status quo				
Committing to change				
Exploring possible solutions				
Committing to a solution				
Making the selection				

Topic of interest

	Email 1	Email 2	Email 3	Email 4	Email 5
Topic 1					
Topic 2					
Topic 3					
Topic 4					
Topic 5					

PERFORM TESTING AND OPTIMIZATION.

Why testing is crucial.

Almost every marketer knows that their lead nurture is a living program—nurture tracks and streams need to be tested regularly to maintain their health and effectiveness and increase performance.

Testing gives the marketer insight into the aspects of a nurture track that could be optimized—how many touches within a specific period of time, the types of messages, the time of day, and so on.

There are no golden rules for how to run your campaigns—and that can be frustrating—but rules don't exist because what works for one audience won't necessarily work for another.

Testing is your ally and a critical part of your long-term lead nurturing success. Your lead nurturing strategy needs to continually evolve. Testing will give you the insight you need to ensure that you are providing an experience that fits your audiences' preferences.

But don't test just to test. Make sure you're focusing on decisions that improve desired outcomes by setting goals and specifying measurement criteria.

Optimization

Using the results of your testing to optimize your lead nurturing ensures its successful evolution and continued relevance for your buyers.

Here are three common ways you can optimize your lead nurturing:

1. Lead nurturing frequency optimization: Each buyer is likely to research your product and industry in a different way. Because of this, the frequency with which they receive your messages must be tailored to their needs. To accommodate your buyer, we recommend that you allow them to choose which path they will take part in by using online behavior to decide whether they should be moved to the accelerated nurturing path.
2. Lead nurturing path optimization: Path optimization helps adjust the order in which a buyer sees your nurture messages. You can do this with a simple A/B test, altering the order of the messages in the nurturing campaign and implementing those changes based on your results. Continue altering messages on a regular basis until you discover the best path for your buyers. It's especially important to test the order of new content that you add to a nurture track.
3. Lead nurturing content and creative optimization: The content included in each nurture communication needs to be updated and improved on a regular basis. This includes using A/B testing to find out which email content, social messaging, website offers, and more should be used. This also includes trying different types of content, like videos or audio, as part of the message.

Content mix improvement

To identify which messages and related content assets are ripe for testing, look at performance reports and engagement scores of the different assets. When you're running nurture, look at how the touches are performing and then see if there are discrepancies. A quick way to evaluate your program is to rank your communications based on their performance and engagement scores.

Look at the bottom quarter and decide if you want to remove or improve them.

This is also a great way to identify future tests. Each organization needs to define its benchmark for success and removal. If a piece falls below the benchmark, it's up to the lead nurture track owner to remove and replace or retool.

Track and stream testing

A lead nurturing program is fundamentally a repeatable process: The same communications launch day after day, week after week, to a relatively consistent audience profile. The lessons learned from testing the key elements in your lead nurturing program can have a significant, long-term impact compared to a standard outbound campaign. For example, if you learn that one email subject line increases responses by 10%, you can impact all emails going forward.

Additionally, you should test the effects of frequency and timing.

Test the day of the week that your nurture campaign launches, the cadence of your contact (e.g., two times per month versus one time per week), and the time of day.

Quick tip: Before starting new tests to find the best time of day, consider what you already know about your audience (for example, when they prefer to receive communication).

Maybe you have pinpointed a range that is successful (for example, between 6am and 9am). Since you already have that information, run your test within that time frame (e.g., test 6:30am against 9am) instead of starting over and testing large time ranges throughout the day, like morning versus afternoon.

When developing your campaigns, use the waiting period—the period between triggers and actions—as a test element to see if and how conversion rates are impacted by time period changes.

The golden test

To prove ROI of your lead nurturing efforts, run a test that looks at nurtured buyers versus non-nurtured buyers. Doing this creates a benchmark and a control group that you can use to show the effectiveness of your lead nurturing program over time.

Email testing basics

Since email is such an integral part of your lead nurture strategy, testing your emails is essential for success. There are no golden rules for how to structure your emails. What works for one audience may not work for another, which is why testing is so critical.

Here are five elements to consider testing for your lead nurturing emails:

1. Subject line
2. Offer
3. Frequency
4. Design
5. Copy length

Seven tips for testing

1. Start simple. Test subject lines and headers first. It doesn't take much time to come up with a few variants, and the return can be significant.
2. Have a control group, and be sure to limit the number of variants to one.
3. Keep a log of all your tests. Be sure to record your findings for reference and sharing with others.
4. Make sure testing is a part of your day-to-day process. Testing doesn't have to be daunting, and it shouldn't be something you put off because of a lack of resources. Make it routine.
5. Run tests on groups that are small, but large enough to make sure your results are statistically significant. The winning variables should then be incorporated into your other nurture track emails.
6. Don't forget that small differences can be significant. This is especially true if your sample sizes are large.
7. Listen to what your tests tell you. Testing doesn't matter if you don't change your emails accordingly.

Basic lead nurturing email measurements.

Here are the seven most common email metrics:

1. Sent
2. Delivered
3. Bounced
4. Opens or open rate
5. Clicks or click-to-open rate (CTO)
6. Unsubscribe rate
7. Marked as spam

Sent

Your sent metric is the number of emails that actually moved through your marketing automation platform.

Delivered

Delivered refers to the number of emails that were sent and not rejected by the receiving server. It's important to understand that delivered does not mean it landed in the recipient's inbox.

At Adobe, we define "delivered" as the number of contacts who are successfully delivered at least one message.

Bounced

Bounced email is the opposite of delivered email. There are two types:

1. Hard bounces are permanently rejected messages (emails denied due to an invalid email address or because the recipient's server has blocked the sender's server).
2. Soft bounces are messages that have been temporarily rejected because the recipient's mailbox is full, the server is down, or the message exceeds the size limit set by the recipient. Too many soft bounces to one address can eventually result in a permanent hard bounce.

In both cases, "bounced" is defined as the number of people who were sent a message that was rejected.

Opens or open rate

We define opens as the number of contacts who opened the email at least once, and the open rate as the number of opens divided by the number of leads delivered.

Opens are tracked by adding a small, personalized image ("pixel") to the email. As soon as the image renders, your marketing platform will register that the email has been opened. Note that this means opens is a difficult metric to track, and there is also no guarantee that an opened email was actually read.

As we mentioned earlier, most email clients block images by default.

The bottom line is that the open rate isn't 100% accurate, but it does serve as a good proxy for whether emails are being read, and as a relative measure to compare emails against each other.

The Marketo Engage benchmark on email performance found that top performers had significantly higher open rates, showing the value of trust and quality targeting:

- **Average companies:** 10% to 15%
- **Top performers:** 16% to 20%

Clicks or click-to-open rate

When a subscriber clicks on a link, button, or image within your message, a click is recorded.

We define total clicks as the number of people who click at least one link in the email. In other words, like the open rate, no matter how many times a recipient clicks on the link or links, only one click is recorded. Counting in this way provides a better measure of how many subscribers are truly engaged. This also ensures the click rate cannot be greater than 100%.

Click rate equals the total number of clicks divided by the total number of emails delivered (or sent, depending on the measure used). The click-to-open (CTO) rate is the total number of clicks (per subscriber) divided by the total number of opens. This means that the click rate equals the open rate multiplied by the click-to-open rate.

Marketers often pay more attention to the CTO than the click rate, since the CTO rate helps to separate the reasons for opening from the reasons for clicking. In the Marketo Engage benchmark on email performance, top performers had better click rates and click-to-open rates:

Click rates:

- **Average companies:** 2.1% to 5.0%
- **Top performers:** 5.1% to 10%

Click-to-open rates:

- **Average companies:** 11% to 15%
- **Top performers:** 16% to 20%

Unsubscribe rate

We define this as the number of contacts who click the unsubscribe link in an email and then follow through to successfully opt out.

The Marketo Engage benchmark on email performance found that top performers had lower overall unsubscribe rates:

- **Average companies:** 0.11% to 0.20%
- **Top performers:** <0.10%

Marked as spam

We define this as the number of subscribers who reported your email as spam, divided by the number delivered.

You want to do whatever you can to bring the marked-as-spam rate to the lowest number possible—ideally, zero. The more engaging you are, the fewer spam complaints you'll receive. Remember your goal: Send timely, targeted, valuable, human content to people who have requested it.

Understanding advanced measurements.

By moving away from traditional vanity metrics with your lead nurturing, you can tie your efforts closely to moving leads down your sales funnel to eventually become customers. Basic metrics are a great start, but they don't really tell you what is driving engagement and revenue across channels.

Engagement

Engagement is more than an idea or a buzzword—it's a tangible way of interacting with consumers one-to-one across channels by listening, acting, and analyzing.

With the right tools, engagement can be measured, managed, and increased. Operational metrics, like opens and clicks, are not ideal for measuring multichannel engagement. In order to measure engagement accurately, you need a way to combine multiple important metrics.

Engagement metric

The Marketo Engage engagement score is a proprietary algorithm that our data science team created to determine exactly how engaging each message is. It combines multiple data points—clicks, opens, conversions, unsubscribes, program successes, among others—and then applies a statistical algorithm to create a single measure of engagement.

Our engagement score provides a standard way to measure the engagement of your messages over time as opposed to isolated, standalone incidents. With this new level of measurement, you can accomplish the following better:

- Fine-tune campaigns to continuously improve engagement
- See how the changes you make improve engagement over time
- Test different messages and content streams against each other to find which are the most engaging

This metric takes the guesswork out of your marketing metrics and applies a tangible number that you can use when making future marketing decisions—not just decisions regarding lead nurturing, but your entire multichannel strategy.

Lead acceleration

Measure how long it takes to move your leads between nurturing stages and tracks, and also how long it takes to move nurtured leads to sales. You should also compare nurtured and non-nurtured leads. Is there an acceleration pattern?

We compared lead acceleration with nurtured leads to lead acceleration with non-nurtured leads to see which yielded more marketing qualified leads (MQLs) to be sent to sales. We found that, especially with "slow leads" that take over a month to be qualified, nurturing accelerated these leads 20% faster than without nurturing. We also had more MQLs at a 33% lower cost per lead.

You can also use the success path analyzer in Marketo Engage to measure performance metrics for each stage of the revenue cycle. You can see how fast your leads are moving to each stage and where there are bottlenecks.

Revenue impact

To become more strategic about measuring financial metrics in lead nurturing, start by recognizing that your buyer rarely makes a purchase as a result of a single campaign.

Conventional marketing wisdom proposes that at least seven successful cross-channel touches (forms of engagement) are needed in order to convert a cold prospect into a buyer.

Sometimes companies attempt to tie revenue to either a customer's first touch or their last. A better strategy is to allocate the value of every engagement across all of the marketing efforts that a customer touched.

Let's take a look at how you can do this.

1. Count all the successful touches.

In a multichannel scenario, successful touches can happen across many channels. Maybe the customer's last touchpoint was your website, but before purchasing, they spent time in an email, on your Facebook page, and on your Twitter feed. When collecting all your touches, be sure to only count those that occurred before the action was taken (those that led to the action).

2. Assign value to the final action.

You might use a transactional system, or CRM, as the system of record for how much the action is worth. A marketing automation tool makes it easier for you.

3. Distribute that value across your successful touches.

In a multitouch attribution scenario (multiple marketing activities with a lead over time), you assign a value to each successful touch. Often, this is best done with simple distribution: if a lead touched five marketing programs, each touchpoint gets one-fifth of the credit for the ultimate value. As simple as that seems, it's often easier said than done because most email platforms don't support such sophisticated analysis. But modern marketing automation solutions can do this right out of the box.

With the opportunity influence analyzer in Marketo Engage, you can track how all of your programs affected a closed deal throughout the entire lead lifecycle.

Go big with lead nurturing.

Lead nurturing is defined as the process of building relationships with buyers regardless of their timing to buy. The old batch-and-blast model of email marketing is in the distant past—forward-thinking marketers are looking for ways to engage their buyers with personal, relevant communication throughout the buyer lifecycle and across multiple channels.

With the help of a marketing automation solution, you can create these flexible, adaptive communications at scale by implementing a lead nurturing strategy and program.

Not only does lead nurturing help you develop and maintain a long-term relationship with your buyers, but lead nurturing helps companies generate over 50% more sales-ready leads at 33% lower cost per lead.

We created this guide to outline the importance of multichannel lead nurturing as a part of a modern marketing mix, and we included some thoughtful exercises, worksheets, and tips to develop your own strategy. All of this can help you define the team you will need to deploy lead nurturing and how to calculate its ROI.

We set out to help everyone—from novices to seasoned practitioners—develop and refine their skills and thinking. Now that you've read this guide, you should have a good understanding of how to build a trusted relationship with your buyer by holding a consistent conversation, full of personal and relevant information, across all of your buyers' channels.

When you invest in lead nurturing, you make the most out of every dollar your organization spends on demand generation, and you can rekindle once-stagnant opportunities from your existing database. By using lead nurturing campaigns to interact with your buyers and understand their interest and behavior, you gain deeper insight into their buying intent, increase the relevancy of future lead nurturing campaigns, and ultimately benefit from more and higher quality sales leads—increasing conversion rates and driving explosive revenue growth.

About Adobe Marketo Engage

Adobe Marketo Engage specializes in customer engagement for complex B2B buying journeys. As a complete solution for lead management, it brings marketing and sales together to nurture leads, orchestrate personalized experiences, optimize content, and measure business impact across every channel. It natively supports both demand- and account-based marketing strategies, providing a single, integrated lead management platform from acquisition to advocacy. Build engaging, personalized experiences at scale and prove impact with Adobe Marketo Engage.

Sources

"The Complex Sale: Lead Scoring Effort Increases Conversion 79%," MarketingSherpa, January 25, 2012.

"Email Marketing Benchmark Results" webinar, Adobe Marketo Engage.

Rajat Chauhan, "10 Eye-Opening Statistics on Lead Nurturing," Business 2 Community, May 24, 2019.