ZOHO MarketingHub

Lead NURTURING

Introduction

Lead nurturing is the core of any marketing technology. It is the best way to convert an interested person (a lead) into a customer. This material will tell you who should be considered a lead, why, what kind of approach will work, and the ways to nurture your leads.

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What is lead nurturing?

“Attract, Engage, Serve.”

Lead nurturing, also known as drip marketing, is a series of processes used to build effective relationships with leads before converting them into valuable customers. For leads to grow into successful customers, they must be nurtured through various marketing strategies.

For example, your website may be a wonderful platform that provides downloadable eBooks, but it does not mean that every person downloading eBooks will become a prospect or customer.

A report from Gleanster Research says that around half of the leads interested in buying do not commit immediately. To remedy this, you could contact them through your sales executives and pressure them into buying. However, this strategy is likely to be counterproductive and could result in losing the customer.

Here is where lead nurturing comes into the picture to keep your leads happy throughout their buying journey. Lead nurturing is all about understanding the needs and behaviors of potential buyers, providing them with solutions to streamline their needs, and finally, making them customers.

“Treat leads like future customers because that is what they are.”

Who is your lead?

Marketers, sales executives, and other business competitors have different opinions on the term “lead”. How you choose your lead is totally up to you. Maybe your lead is a person who just filled out a form at your trade show or someone who recently subscribed to your newsletter. Your lead may even be an active visitor of your website who knows a lot about your product.

More ways to build your leads

You can select your leads from the lists of contacts you had saved for previous campaigns, import a set of contacts from CRM software, or sync your site with Google Analytics or another automation technique that tracks visitors and their activities. You can also embed your sign-up form in your website and social media, send SMS and newsletters to leads, or add referral and subscribe options to all the campaigns you send. Functions like the “like” and “comment” buttons on social media can also help you find leads.

More leads, more referrals, more customers.

Why is lead nurturing crucial?

“Lead nurturing provides effective ways to cause good performance by communicating with customers on a sophisticated level, creating and maintaining relationships over time by following your leads’ activities.”

A B2B buying cycle is a complex endeavor that could last several months or longer. B2B buyers often have a high level of concern about making or failing to make an appropriate buying decision. However, there is always a chance that your best efforts will get the person interested. Lead nurturing is the best way of achieving this.

"Every lead needs to be nurtured to build a healthy customer relationship."

Build trust; build relationships

"You are promising enough that the buyer chooses you right away when (s)he is in need."

The days of a buyer being "carried away" by a sales person's pitch and making an immediate purchase are over. The internet makes it easy for prospective customers to shop around and research a product before they buy. Customers tend to engage with companies they know well and trust. Lead nurturing can help you turn today's casual website visitors into tomorrow's prospects, building communication and trust to convince a potential buyer that you can deliver on your promise. In fact, nurtured leads make 47 percent larger purchases than non-nurtured leads (The Annuitas Group).

Engaging with your customers

It's never easy to find out what is going through a potential buyer's mind, or which of your products they are most interested in. The only way to discover this is to engage with your customers. Asking relevant questions can help identify the requirements of the buyers, and meaningful conversations will tell you which of your leads is most likely to buy.

Multichennal Marketing.

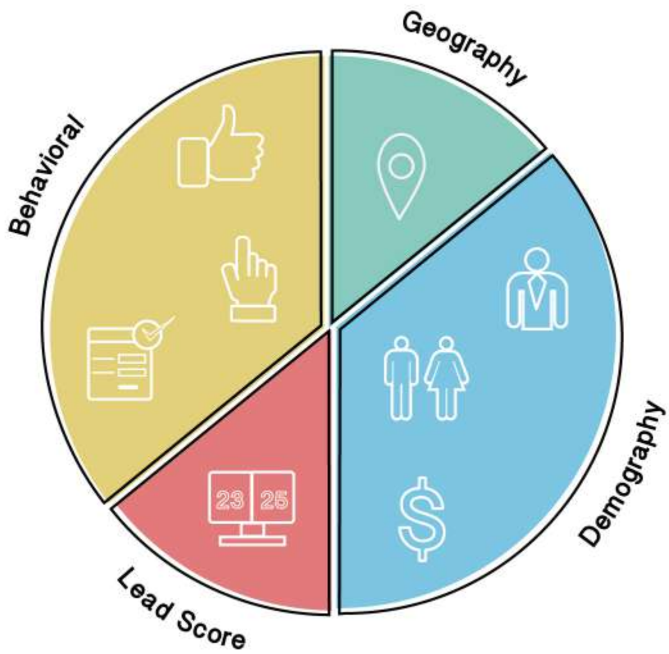
Lead nurturing uses automated email campaigns to communicate with visitors to your site. Messages are customized to the lead's behavior: A person who viewed five pages after clicking through your website will receive a different response than a person who viewed only one page. Further campaigns can be modeled based on customer activity. If a lead takes several days to make a buying decision, spreading out your auto-response communications across that period can help to engage them and get them interacting with your business.

Emotions make a difference

A good purchase may or may not reward the buyers, but a bad purchase affects your reputation. Effective lead nurturing involves emotional understanding and responsive acting. Your communications should make the buyer believe you are capable of understanding his or her problems and solving them, ultimately boosting the chances of consideration and purchase decisions.

Segmenting is easier

Sending every campaign to all three million leads in your list is cumbersome and ineffective. Segmenting helps you customize your email to target specific leads. Consider criteria like location, needs, interests and behaviors when segmenting your list.



Mass emails vs automated emails

Mass email lacks the impact of well-timed response. It offers the same deals and discounts to all recipients, regardless of their particular interests.

Automated campaigns are scheduled based on your lead's activities and response to former messages. Targeted messages at the right time show that you understand the buyer's needs. When a potential customer responds to an email with clicks and downloads, that is the moment to engage them. They're interested in your brand and you should act accordingly.

The marketing automation feature has made lead nurturing more modern, personalized, and adaptive, letting you listen and react to buyer behavior in real time.

Optimize your lead nurturing strategy

About 79% of the marketing-qualified leads do not convert to sales (Source: MarketingSherpa), and the reason for such poor performance is the lack of lead nurturing. Adopting the right lead nurturing strategy increases the chances of lead engagement.

The best lead nurturing strategy is the one that is consistently revised. Analyze what worked well, where you've missed out, and what elements you can add to improve your system.

The main objective of any lead nurturing strategy is to bring the leads to sales. Here are a few things to consider when you're refining your approach.

Lead Strategy Conversation

- Ideal lead profile

  A lead persona is the most effective tool you have to qualify your incoming leads. Sales and marketing should revisit and update the information that an ideal profile contains to take advantage of current trends.

- Lead scoring

  Lead scoring helps you target your efforts by giving you a metric to identify the hot, warm, and cold leads. It is again the task of marketing and sales to discuss or revise the scores assigned to lead activities.

- Website

  Your website is the first place all leads go, and thus it is the best platform for your marketing. Make sure you provide personalized content, images, and blogs that will engage the website visitors.

- Email communication

  Analyze the type of content that most engages your leads. Include links, highlight important content, and summarize why and how your product will benefit the buyer. Keep your email content concise and relevant to appeal to the reader.

- Social media

  Social media engagement adds value to lead nurturing. Fine-tune your posts and analyze the response. Actively responding to tweets, comments, and messages on platforms like Twitter, Facebook, and LinkedIn builds stronger relationships with your leads.

- Personal message
  Consider offering a phone call or a personal email message to a lead who does not show progress through the buying cycle. The communication should focus on why and how the product benefits them rather than what the product is.

Content

"Your content is your brand's voice."

Powerful content is the most necessary component of lead nurturing. Your content needs to be relevant and convincing to influence the buyers' mind when they are ready to purchase.

What type of content invites buyers?

- Informative: Know the questions your customers ask and create content to address them. Enhance your message with lists of links and resources to related websites and blogs. If the lead trusts you, finds your content informative, and likes your approach, they are likely to buy from you.
- Relevant: Email marketing is most effective when you have relevant content. Segment buyers as much as possible to send out meaningful campaigns. Customized email drives 18 times more revenue than broadcast email.

"Say right things to the right person at the right time"

- **Conversational:** Consider your every move and let the lead respond to you. Taking their response into consideration will help you design better content for your next email.

- **Visual:** Remember, your buyers are busy professionals who might not have time to read your entire message. Understand the types of visual content that works best to describe your product. Pictures can have a significant influence on a reader's emotions. Keep your text brief, use bullet points and keywords, and let the images tell the story.

  "Be creative about your design, topic, and format."

- **Video marketing:** Follow your prospects at every stage of their buying journey. Adding video content to your campaigns to show prospects how your product works and how it can serve their needs is especially effective when they are at the buying stage.

- **Multiple messages:** Design a variety of messages for a single email campaign. This will help you determine what type of content the leads engage with most. Having that information makes working on future campaigns easier.

- **Exit criteria:** You gain the best results out of lead nurturing when you nurture the right leads. A lead who is very much ready to purchase from you can be immediately pushed to sales, while further nurturing is needed for warm leads.

To focus on the warm leads, we at Zoho MarketingHub have a practice of applying a stop condition to lead nurturing campaigns. When a set of automated campaigns are scheduled, the stop condition is defined as well. For example, we might set it as "lead score above 100." A lead who satisfies that condition would fall into the "nurtured lead" category and would no longer receive the campaigns.

Monitoring the success of lead nurturing

How will you know you're doing a good job of nurturing your leads? Reports on sent campaigns help you analyze how your campaigns are performing. They give data about which leads are interested, when they open your email, and what type of content interests them.

Lead Nurturing Conversion Success Rate

Learn how Zoho MarketingHub does it.

With an exclusive feature called journeys, you can send out nurturing campaigns to the leads. Our analytics tool tracks the sent, delivered, open, click, and bounce rates of each of these campaigns.

You can also view an overall report of the journey of a lead, send follow-up messages based on the leads' activities on previous messages, and get a count of nurtured leads in the mailing list.

Understanding journeys

Journeys let you segment your leads based on their activities and initiate a series of messages and actions for them. Create an action flow and have them be completely automated. Every journey has three major sections.

- Trigger

  Under the trigger section, you'll define the condition for your leads to enter the journey. Consider the following examples:

  - Update field trigger

    A journey with this trigger initiates whenever there is an update in the field you select.

  - Form submission trigger

    A journey with this trigger initiates whenever there is a sign up via the form you select.

- Process

  Under the process section, you'll define a series of actions to be performed on your leads. You can create an email series, define actions, split the path based on conditions, and much more.

- End-of-journey actions

  Under the end-of-journey actions section, you'll define a series of actions that will be performed when the lead completes/exits the process.

Types of journeys

Journeys are classified under two major categories:

- Predefined journeys
  These type of journeys have the trigger type already defined. There are six types of predefined journeys.
- Custom journeys
  Define a trigger type, configure the process elements and end-of-journey actions to suit your requirements.

How to create a journey for lead nurturing?

1. From the Navigation toolbar, select Journeys and choose All journeys.
2. Click the Create journey in the top-right corner.
3. Mouse over Custom journey and click Create.
4. Give your journey a name for future reference and click Create.

Set up process

Build a complete journey for your leads under the process section; create email series, define actions, and set rules to separate paths based on leads' behavior and information.

The following is a list of all that you can do under the process section:

- Send email

  Send an email to your leads when they reach this stage of the journey. The journey has a predefined email series template. To configure:

1. Click the **Configure** in the message block.
2. Add the message's basic info and content.
3. Mouse over Custom journey and click Create.
4. Click **Send for review** to send your message to our compliance team for review. Your reviewed message will be sent out as per schedule once you activate the journey. Messages, by default, will be sent one day after the previous action was performed. However, you can edit (link to schedule) the message's schedule.

- Send SMS

  Send SMS messages to your leads when they reach this stage of the journey.

1. Drag and drop **Send SMS** component from the Process section of the left panel into the canvas.
2. Click the Configure in the message block.
3. Add the message's basic info and content.
4. Click Send for review to send your message to our compliance team for review.

Your reviewed message will be sent out as per schedule once you activate the journey. Messages, by default, will be sent one day after the previous action was performed. However, you can edit (link to schedule) the message's schedule.

- Set reminders

  Send your leads reminders when they do not respond to your emails. Following are the different types of reminders:

1. **To opens:** when leads who do not open your email
2. **To click:** when leads do not click any links in the email
3. **To click specific link:** when leads do not click a specific link in the email
4. **To start survey:** when leads don't start a survey
5. **To submit survey:** when leads don't submit a survey
6. **Custom:** create your own condition.

Click **Reminder loops** component from the Process section of the left panel and drag and drop the desired loop into the canvas. You will then have to do the following:

- Assign tags

  Assign tags to leads when they reach this stage of the journey.

  Drag and drop the **Assign tags** component from the Process section of the left panel into the canvas. Click **Configure** in the action block and select your intended tag from the list.

- Remove tags

  Remove tags from leads when they reach this stage of the journey. Drag and drop the **Remove tags** component from the Process section of the left panel into the canvas. Click **Configure** in the action block and select your intended tag from the list.

- Add to list

  Add leads to a list when they reach this stage of the journey. Drag and drop the **Add to list** component from the Process section of the left panel into the canvas. Click **Configure** in the action block and select your intended mailing list.

- Remove from list

  Remove leads from a list when they reach this stage of the journey. Drag and drop the **Remove from list** component from the Process section of the left panel into the canvas. Click **Configure** in the action block and select your intended mailing list.

- Add lead score

  Add score to your leads when they reach this stage of the journey. Drag and drop the **Add lead score** component from the Process section of the left panel into the canvas. Click **Configure** in the action block and select the score to be added.

- Subtract lead score

  Subtract score from your leads when they reach this stage of the journey. Drag and drop the **Subtract lead score** component from the Process section of the left panel into the canvas. Click **Configure** in the action block and select the score to be subtracted.

- Update field

  Update the value of your leads' field when they reach this stage of the journey.

  Drag and drop the **Update field** component from the Process section of the left panel into the canvas. Click **Configure** in the action block and select the intended field and the value to be updated.

- Push to Zoho CRM

  Push your leads' data into Zoho CRM when they reach this stage of the journey.

  Drag and drop the **Push to Zoho CRM** component from the Process section of the left panel into the canvas.

  Click **Configure** in the action block.

  Fill in the following information:

1. Select from the following two options: you can either push the Zoho MarketingHub-related information of all leads to Zoho CRM (new records will be created for leads new to Zoho CRM) or update just the data of leads already existing in Zoho CRM (new records will not be created for leads new to Zoho CRM).

2. Select the Zoho CRM module to which you want to push your leads into.

3. Map Zoho MarketingHub fields with the respective Zoho CRM field.
   Click **Save.**

- AB test

  With this component you can A/b test two versions of your campaign. Send these two versions to a small group of your leads and decide the winner based on their performance. Once the winning version is decided, it will be sent to the remaining leads.

  Drag and drop the **AB Test** component from the process section of the left panel into canvas. Click **Configure** in the action block. Fill in the following information:

1. **Size of the test group:** Enter the number of leads who should receive these test versions. 50% of the selected number will receive version A and the remaining 50% will receive version B.

2. Select **how the winner should be decided.** You can choose to decide based on open rate or click rate or decide the winner manually once the test is complete, based on their reports.

3. **Test duration:** Select the time duration for which the test should run. The test will start after the versions have been sent to the selected test group.

3. Select **which version should be sent in case of uncertainty.** Following are the cases of uncertainty:

   - When there is a tie after the test
   - When a lead reaches this stage after the versions have been sent to the test group and while the test is still running

After the test is complete the winning version will be decided. Leads who enter after the selected test duration will take the path that follows the winning version.

- Random split

  Split the path of the journey randomly to two group of leads. Drag and drop the **Random split** component into the canvas. Click **Configure** and select the percentage for each group. When leads reach this stage they will be randomly put into each path.

- Milestone

  With this component set the milestone of your journey. You can view the leads reaching these milestones and thus you can analyze the performance of the journey.

  Drag and drop the **Milestone** component into the canvas and make the intended connections.

- Move to another journey

  Move leads to another journey when they reach this stage of the journey.

  Drag and drop the **Move to another journey** component from the Process section of the left panel into the canvas and select the destination journey. The destination journey should be a custom journey with an open trigger. An open trigger is not based on any criteria. The journey with an open trigger will be open to leads pushed to it by other entities (e.g., other journey, workflows).

- Move to end-of-journey

  remove leads from the process and move them to end-of-journey when they reach this stage of the journey.

  Drag and drop the **Move to end-of-journe**y component from the Process section of the left panel into the canvas.

- Exit from journey

  Remove leads from the journey when they reach this stage of the journey.

  Drag and drop the **Exit from journey** component from the Process section of the left panel into the canvas.

- Set rules

  Set rules based on lead information and behavior and branch out the path. When leads reach this stage in the process they will be checked for whether they meet the criteria or not and will take the corresponding path. There are three types of rules:

  - Simple criteria

    Set up a criteria based on either lead information or recipient activity. Split the journey here for leads who satisfy the criteria and for those who don't.

  - Three way

    Segment your leads based on their field value and create separate paths for each segment. You need to provide two different values for the field you select. You will create two paths for these two values and a third path where both these conditions are false.

  - Multi way

    Segment your leads based on their field value and create separate paths for each segment. You can provide a maximum of six values for the field you select. You will create as many paths for as many values you provide and another path where all these conditions are false.

Click the **Rule** component from the *Process* section of the left panel and drag and drop the desired rule into the canvas and configure it to suit your requirements.

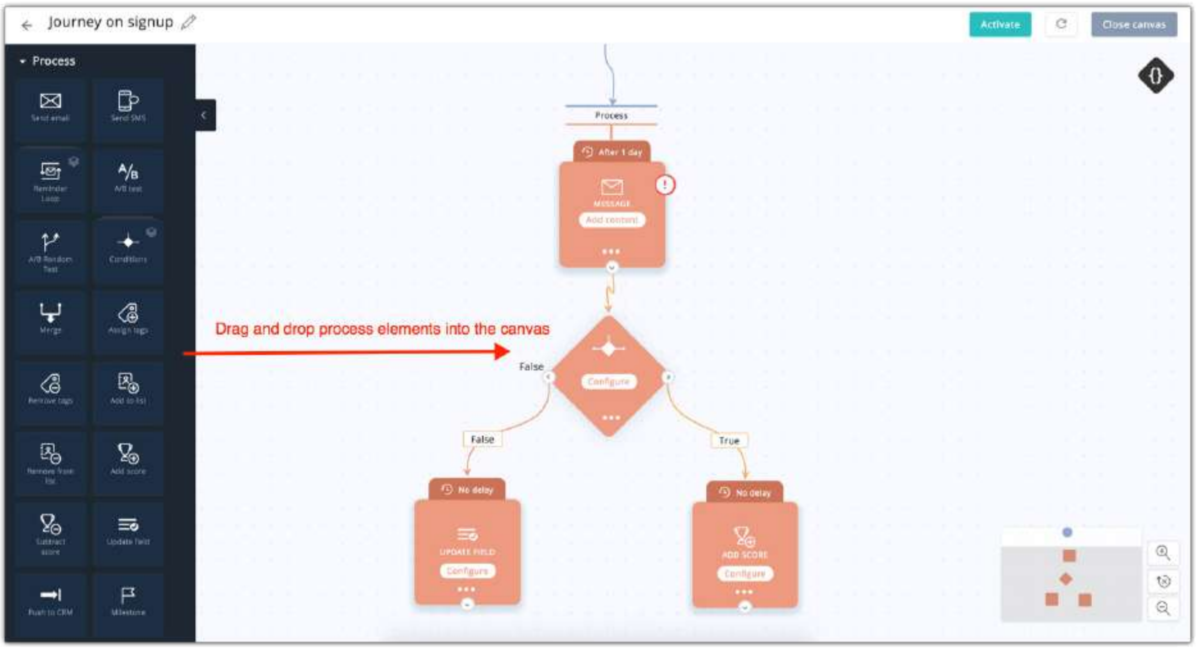
Note: You cannot have rules in smart series and date-field journeys.

- Merge

  Use this component if you need to merge two or more paths into one. Drag and drop the **Merge** component from the Process section of the left panel into the canvas and make the connections as required.

  Note: You cannot connect the end node of the merge component with an end-of-journey action.

After configuring the actions to be performed under process, connect the actions in your desired sequence and set the delay between them.



The default delay is one day for sending a message and one hour for other actions. However, you can edit the delay to suit your requirements. Mouse over the delay section above the component and click the Edit icon to change the delay. The delay for the first component is based on the trigger. The delay for the other components is based on the previous component.

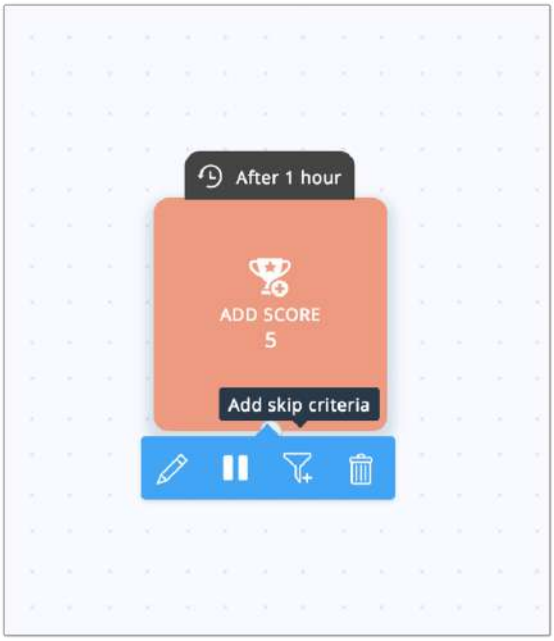
Notes:

- *The minimum delay between any two messages is one hour.*
- *You cannot set a delay for a rule.*

Configure component skip criteria

Decide for who the process actions should or should not be performed by setting up a criteria based on lead information or recipient activity. The lead that meet the criteria will skip that component and proceed to the next component.

To configure component skip criteria, click the **More** icon in the component, select **Skip criteria** option, and set the criteria that fits your requirements.



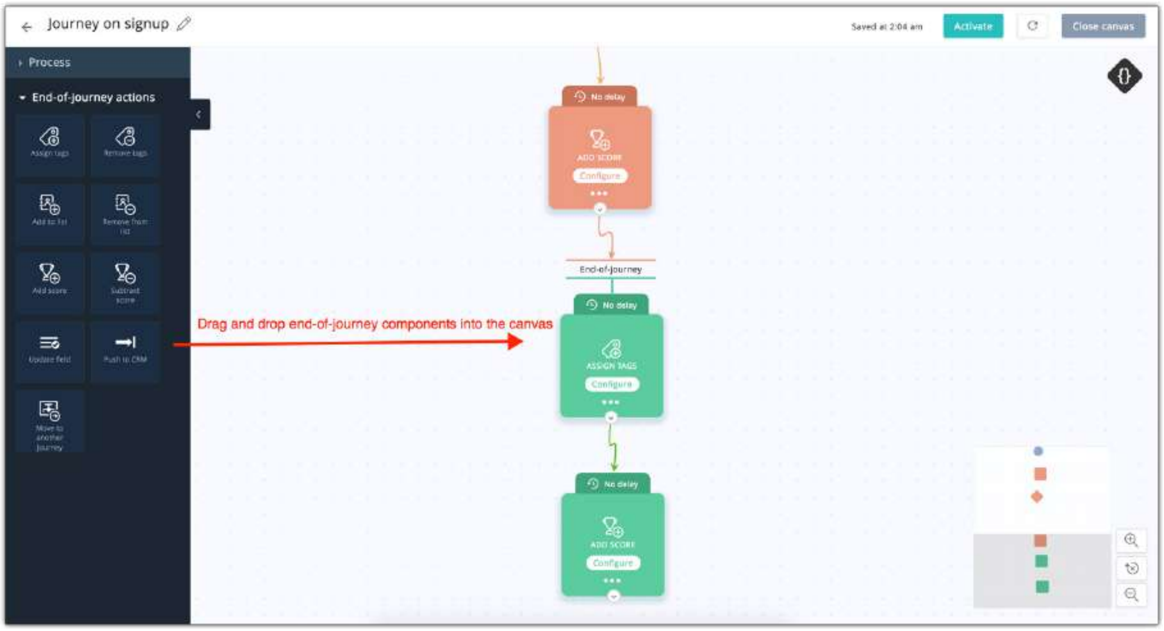
Define end-of-journey actions

End-of-journey actions are performed once the lead has exited the process.

Drag and drop action components from the End-of-journey action section of the left panel into the journey canvas and configure them. Listed below are the actions that can be performed:

- Add to another list
- Remove from list
- Push to Zoho CRM
- Update field
- Assign tag
- Remove tag
- Add lead score
- Subtract lead score
- Move to another journey

After configuring the actions to be performed after process, connect them with each others in your desired sequence and set the delay between them. Note that having end-of-journey actions is not mandatory.



Set delay between end-of-journey components

The default delay between the actions is one hour. However, you can edit the delay to suit your requirements. Mouse over the delay section above the actions and click the **Edit** icon to change the delay. The delay for the first action is based on the time the lead exits the process. The delay for the other actions is based on the previous action.

Configure action skip criteria

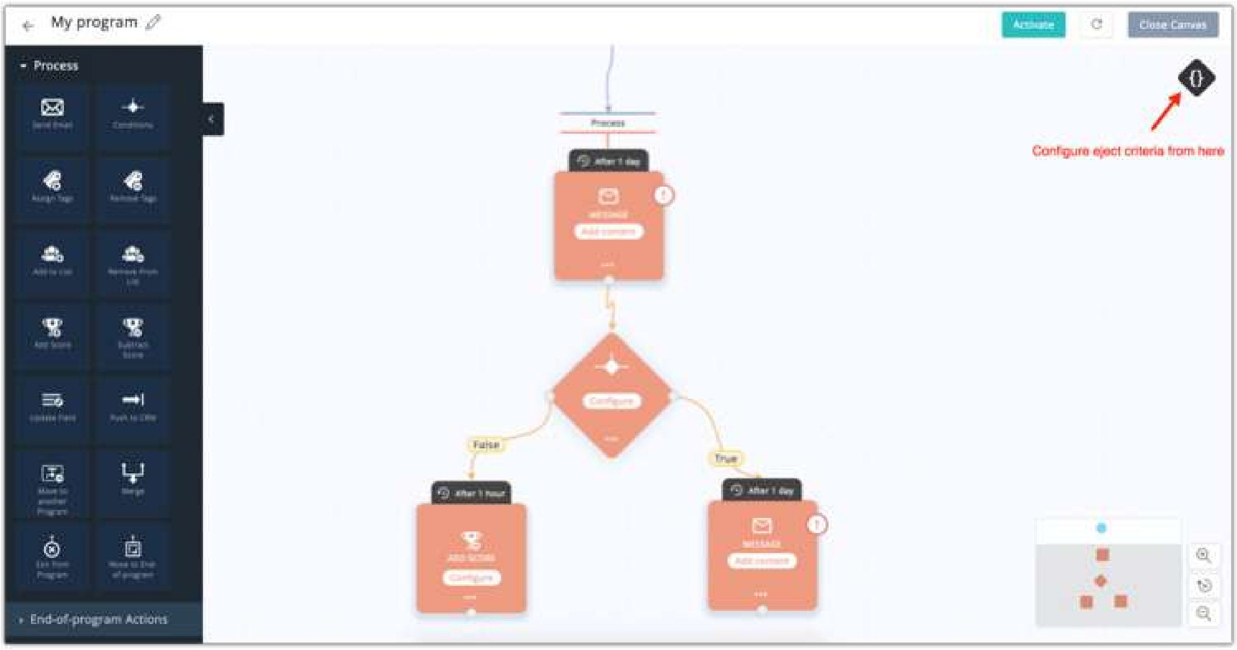
Decide for who the actions should or should not be performed on by setting up a criteria based on lead information or recipient activity. The leads that meet the criteria will skip that action and proceed to the next action.

To configure action skip criteria, click the **More** icon in the action block, select the **Skip Criteria** option, and set the criteria that fits your requirements.

Configure eject criteria

Set up criteria based on lead information or recipient activity to remove leads from the journey or process.

Find the **Eject criteria** icon on the top-right corner. Set the criteria that fits your requirements and choose whether the lead meeting the criteria should be ejected from the process or the journey.



Activate the journey

After you've built up your journey you need to activate it. Find the Activate button on the top-right corner. Once activated your journey is all set.

To be remembered before activating a journey:

- Trigger and all components in the canvas should be configured
- All components in the canvas should be connected
- All end nodes of rules should be connected
- All email content should have been reviewed

Conclusion

Modern lead nurturing strategies enable potential customers to move quickly and seamlessly across multiple channels. A buyer might read your email campaign, check out your social media, and visit your website—all in a matter of minutes.

Lead nurturing is the best strategy to engage your customers and to build credibility. Setting a goal, building your leads, designing the right content for the right people, delivering emails at the right time, active interactions—all these make your marketing more effective.

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