

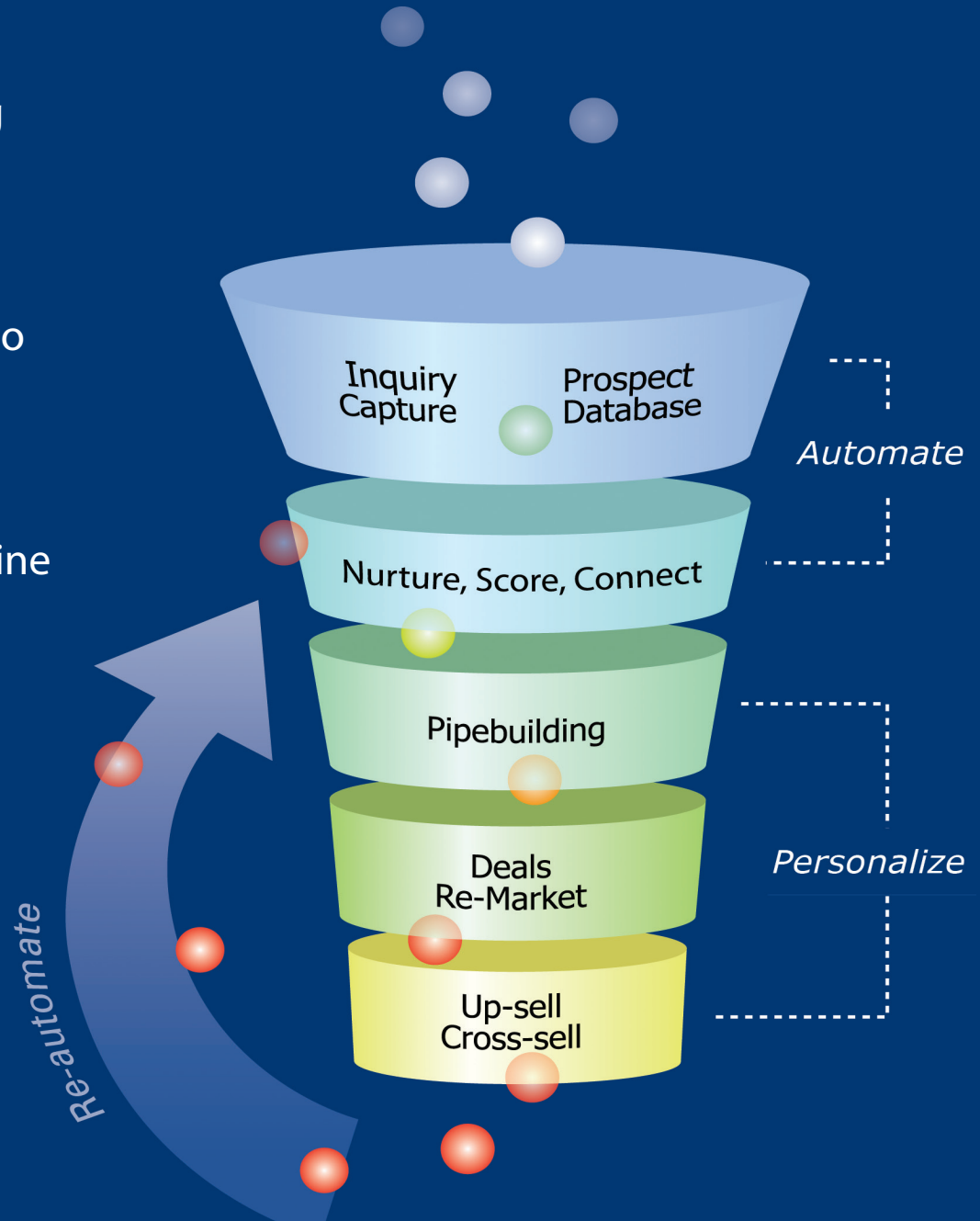
# The Essential Marketing Automation Handbook

*A How-To Guide for B2B Marketers*

Using Lead Scoring  
to Create Sales  
Opportunities

Mapping Content to  
Buying Stage

Optimizing Lead  
Nurturing for Pipeline  
Acceleration



by Ardath Albee



# **The Essential Marketing Automation Handbook**

*A How-To Guide for B2B Marketers*

by  
Ardath Albee

Published by Genius.com Inc.

Copyright © 2009, Marketing Interactions, Inc. All rights reserved.



## Content Resource Guide

### Introduction

In today's B2B market, where the customer has access to volumes of information surrounding their purchase decision, there's been a major shift in the selling paradigm—a shift that all but eliminates “selling” from the process. Now Sales and Marketing professionals must insert themselves into the customer's purchasing process at a much earlier stage, helping the customer buy, through an intelligent, dynamic nurturing cycle.

B2B automated lead nurturing is comprised of three primary components—lead scoring, valuable content and dynamic messaging, all driven by prospects' behavior and profile. In a B2B environment, nurturing programs have one goal in mind—delivering interested, qualified leads to Sales in real time.

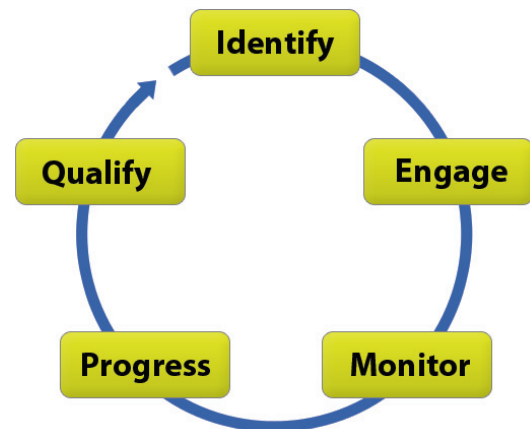
This guide will give you the fifteen crucial steps needed to ensuring success in developing effective lead scoring, appropriate, engaging content for each step in the sales cycle and proven techniques for creating and optimizing B2B lead nurturing programs.

## Creating Sales Opportunities With Lead Scoring

### Chapter 1

Lead scoring is often touted as the new secret sauce that transforms marketing from art to science. Interestingly, recent research from CSO Insights finds that only 26.9 percent of 550 companies surveyed have implemented a formal lead scoring process. So, why aren't marketers rushing to adopt this new technology-enabled feat?

The answer is often related to the enormity of the concept. Lead scoring is a newer methodology that's thought hard to grasp because of the complexity and lack of visibility in seeing the big picture across the entire buying (and selling) process. The truth is that the technology that enables lead scoring doesn't eliminate the art of marketing, but enhances it with the addition of science. Lead scoring helps you ensure that no prospect gets left behind. But it also helps marketers get closer to their company's markets by providing intelligence they can use to tune their efforts, resulting in increasing evidence of marketing's contribution to the sales pipeline.



If you distill the process of lead scoring to its essence, you find measurement that can be used to enable better sales results. Measurement is a concept marketers are recognizing as an imperative for proving return on investment (ROI). But lead scoring's ultimate goal is to help sales sell. The act of applying a score to your leads requires that you interpret their behavior. Points are not merely records of marketing achievement—like click throughs, page views or opt-ins—but evidence of the marketer's ability to deliver compelling content that engages leads by delivering the right information at the right time. Take that a step farther and you've not only got to engage them in the short term, but prove you can build increasing momentum across their buying cycle—and then transition your sales reps into the conversation at just the right moment.

A lead's score is not just a number but a definition of buying interest. The components of the score should be designed to help marketing pinpoint sales-ready leads by assessing levels of engagement related to their interest in your company's ability to solve urgent priorities.

Often more intimidating is that the sales team's reception and conversion of marketing-generated leads is the determining factor for success. But that doesn't need to be cause for hesitation in embracing lead scoring. By breaking down the complexity of lead scoring to a 5-stage process, you'll have a framework that helps you structure the process with the creation of sales opportunities as the goal—right from the start.

This guide will walk you through the process step-by-step, ensuring you have just what you need to drive continuous lead engagement, satisfy the needs of your salespeople, and play a key role in the generation of revenues.

## Start at the End

By knowing where you need to arrive, it's much easier to gauge how to get there. This means you need to start at the goal—producing sales opportunities—and work backwards. Marketers must know what they want lead scoring to achieve before they can plot an appropriate scoring method to produce that outcome.

The best way to accomplish this is to work with your salespeople to define the qualities of a sales-ready lead. Salespeople are face-to-face with buyers every day. They know your customers and they know what it takes to win a deal. Assumptions without

first-person validation can be misleading. So, get sales in the room and hold a lead-definition workshop. Remember that marketers have insights to earlier stages of the buying process that sales may not. Both sides bring valid insights to the definition process, but let sales put the stake in the ground for the ultimate requirements and then back into the factors that play into creating that coveted sales opportunity.

## Stage 1: The Sales Opportunity Definition Workshop

### Step 1: Choose your focus – type of sale, product or problem solved.

Most companies have a foot-in-the-door sale where they excel. Or, your company may have a specific go-to-market agenda that directs marketing and sales efforts. The truth is that all buyers are not alike. Therefore, it's much easier to define a sales opportunity if you narrow the workshop focus. This can be one product or solution. It could be a type of sale or you can base the definition on buyers who use your products and solutions to solve a specific problem. Choose one.

### Step 2: Lead Characteristics

There are 3 levels of lead characteristics. Most companies stop at the first two, demographics and BANT score (Budget, Authority, Need and Timing). However, the beauty of lead scoring adds your ability to include behavioral indicators in the mix. Let's take a brief look at these three characteristics:

Demographics	BANT	Behavioral Indicators
Name	Budget (does one exist)	Clicks (specific content interest)
Title	Authority (decision maker)	Time spent (depth of interest)
Company	Need (defined project)	Path (deep & focused vs. shallow & erratic)
Email	Timing (short-term horizon)	Frequency (activity vs. inactivity)
Phone		Interactive (download forms, opt-in, webinars)
Industry		Dialogue (email replies, web chat, inquiries)
Size		

Ask your sales team what five things they absolutely have to have to qualify and pursue an opportunity. During the discussion, probe for specifics. Don't just take their selections at face value. Probe to learn enough to develop a keen focus on what they really need.

For example, if your sales team says they will only accept a qualified opportunity if the lead is the decision maker, find out what that means. Do they have to begin with the person who signs the check or is the decision maker really the person in charge of the project?

If the sales team states that attending a webinar produces the most highly qualified opportunities, learn what type of webinar. Was it a solution-focused webinar that could pass as a demo, or was it an expertise webinar where one of your company's experts discussed why and how a problem can be best solved? Had they read a white paper on a related topic first, or perhaps as a follow-on to the webinar? Trying to tie contributing factors together will be helpful in creating your lead scoring process.

One of the best ways to help gain consensus for this definition is to revisit your recent customer acquisitions and learn what triggered the move from interested prospect to qualified sales opportunity. Remember that your buyers are likely doing most of their research online before they ever speak directly to your salespeople. Learning about the triggers that preceded their request for a sales conversation can help you create more of them.

Don't overlook the existence of "jump-the-shark" conversion events that create self-qualification. Direct inquiries are one, trial versions of your solution are another. Your company may also learn that investing the time to view the online demo is worthy of an inside sales qualification call, even if it doesn't automatically mean an immediate conversion to field sales.

Remember that this is an iterative process that you'll refine over time. Getting as close as you can to consensus about the top five indicators of a sales-ready opportunity during this workshop is the goal. The number five isn't a hard-and-fast rule. Choose a number that works for your company. Just remember, the shorter the list, the easier it is to get started. And, it's also helpful to compile a list of secondary characteristics. We'll show you how you can back into them during stage two.

Note: Once you've held your first sales opportunity definition workshop, you can conduct this exercise for each product, problem, or market segment to construct a variety of scoring methods that more closely evaluate different buying situations.

## Assess What You Know

Armed with your sales checklist of the five things that define a sales opportunity, the next stage is to determine what you already know about your leads to determine what you need to learn.

### Stage 2: Audit your lead database

Audit your lead database and check off the things on your list that you already know. Then, take a look at what you need to learn and make some notes about how you can do so.

[The chart at the right shows demographic and BANT scores with priority rankings. An example of what you may know is shown in green. Note that in this example, financial services is more important than another industry for the sales team. This is their most successful market and one where they have a competitive advantage.]

One way to flesh out a lead profile is through the use of progressive profiling. At its most basic, this means using forms to gather a few new fields of information each time a lead downloads a white paper or registers for a webinar. By continuously expanding that lead's profile information based on what sales needs to know, you can create a direct path to qualify a sales opportunity.

### Individual Lead Score

Description	Rank	Score	Have
Name	1	15	15
Email	1	15	15
Phone	2	10	
Title	3	5	5
Company	2	10	10
Decision Maker	1	15	
Project Defined	1	15	
Budget	1	15	
Industry	3	5	5
Financial Services	2	10	
<b>Totals:</b>		<b>115</b>	<b>50</b>

Be careful about when you ask for specific information. For example, asking if the lead is planning on solving a problem within a specific timeframe when they download an educational white paper about an industry issue can be interpreted as self-oriented and pushy. However, when they view an online product tour or demo, that's question has a relevant correlation to the activity initiated by the lead.

There are a number of creative ways to learn about your leads through the behaviors they demonstrate. It's up to you to make sure you do so with a high degree of relevance that entices your lead to share more insights about their stage in the buying process.

### Stage 3: Evaluate Your Web Properties

The main component for this evaluation is likely your corporate website. If you have a blog, use educational micro-sites or specific landing pages, those should also be included for lead scoring purposes when possible.

#### Step 1: Do All Web Pages Count?

The first question to ask is whether or not all pages count. The answer to this is mostly yes. To start, assign each web page with a score of one. Whether the visits are issue-focused or not, you want to make sure you know the level of activity of each lead. The important considerations about web pages are to determine which pages are indicative that the lead may not be a fit. An example of this is the career or employment page. Someone looking for a job is likely not a custom-

#### Website Score

Description	Rank	Points	Activity	Score
Solution Pages	1	10	1	10
Drip Content Assets	1	10	2	20
Customer Stories	1	10	1	10
Multi-page Visit	2	5	1	5
All web pages		1	4	4
News/Press	2	5		
Company Pages	2	5		
Career Page		-1		
<b>Totals:</b>				<b>49</b>

er candidate. Assign all those pages to reduce the score by one point to counter the page score they'd have earned otherwise.

Another page view issue to address is a single-page visit vs. a multi-page visit. Leads that make the effort to visit more than one page are either showing you their interest is more than fleeting, or they're showing you they can't find what they're looking for. This said, it's worth increasing the lead's score for a multi-page visit. Make it a practice to play back website visits to ensure your leads are finding the navigational paths that take them to more of the information that's related to their interests.

## Step 2: Rate Web Page Importance

The pages of your website play differing roles in the buying process. Obviously, leads who spend time on the solution and product pages of your website have a higher degree of buying interest than those who visit your "About Us" page. What other information can they view related to each of your products and services would indicate an even higher level of consideration?

Drip nurturing assets should also be ranked higher than other pages. This is because when this content is accessed and viewed, it's further proof of the lead's interest and engagement with your company. If it's at all possible to increase the lead's score when he views a group of content related to the same issue, this could make the difference between knowing just how interested a lead is in time to beat your competitors into the sales conversation. A lead who has viewed a combination of educational articles, solution briefs and customer stories all related to solving the same problem has told you a lot.

Over time, you'll gain the intelligence to learn which pages leads visit during differing stages of their buying process. Marketers can also learn which content is effective as well as which content is missing the mark.

When you rate the importance of your web pages, group them by priority for your first iteration of scoring. Product, solution and customer stories rate more highly than company pages, for example. This exercise of rating the importance of your web pages may also pinpoint gaps in your content that could be addressed for greater lead engagement.

## Stage 4: Scoring Online Dialogues

An online dialog is an exchange. Usually, you promise something – like a white paper – if your website visitor or lead does something in return. This includes providing personal information on download forms for content assets, as well as registering for, and attending, your webinars, to mention a few. Just as trust is built over time, dialogues become richer once you've established higher levels of credibility. They're also the keys to generating sales opportunities.

### Step 1: Scoring Webinars

Webinars are a great way to not only expose your company's expertise, but to engage your leads in online dialogue. There is more to scoring a webinar than assigning points for completing the registration form. Registering for the webinar is only the first step of the dialogue available to marketers.

Consider the following scoring opportunities related to webinars:

- Registration – the lead fills out a form to attend your event.
- Registration confirmation – can you provide some additional related information to whet their appetite for the webinar? Instead of just sending a confirmation email, consider including a link to a relevant article on the topic they signed up to learn more about.
- Attendance – the lead spends their time at your event.
- Q & A Participation – the lead submits questions during your event. Don't just answer them during the course of the event, but follow-up afterward with more information that provides a more complete answer than you might have time for during the event. Consider other ways you can engage them based on what they want to know.

### Webinar Scorecard

Description	Score
Registration	5
Registration Confirmation (add'l info)	5
Attendance	10
Q&A Participation	13
Archive Views	7

- Archive views – If the lead misses the event but accesses and views the archive, additional points should be added to their score. If they attend and view the archive, they may have forwarded the link to a peer or invited others to view it with them if they found it valuable.

## Step 2: Scoring Hand Raising

Hand raising is the equivalent of your website visitors accepting your invitation to tell you who they are and indicate they're interested in something you have to offer. This includes the obvious things such as newsletter subscriptions, content offer registrations, response to email calls to action, taking a survey, and more. There's a big difference between your adding a lead you may be interested in to your lead database and the lead, themselves, actually opting in to hear from you.

A few words about opt-in forms:

- Consider carefully how many fields you include. Less is more inviting. Construct your forms to progressively collect information you need to know to complete the sales checklist. Here's an example of a progressive profile:

- Form 1: name and email
- Form 2: company, title and industry
- Form 3: role in the buying process (influencer vs. decision maker)
- Form 4: project timeline

- Newsletters can tell you a lot if you enable the lead to specify their interests when they sign up. If this isn't possible, consider including a variety of information that will help you pinpoint their interests based on the articles they choose to click through to read.
- One way to give your leads the opportunity to tell you more is by including both required fields and optional fields. Those who fill out the optional fields may be telling you something about their interest levels.

### Hand-Raising Score

Description	Score
Opt-in	10
Download Forms	5
Topical Clicks (at least 3)	3

- Remember that filling out a form is only one instance of interest. It takes much more than that to advance a lead to sales-readiness in a complex sale. This said, when a lead goes to the trouble to fill out a form, they're telling you about a specific interest that may be related to a priority problem they need to solve.
- Once a lead has filled out a form to gain access to specific content, they may search for more of it. If possible, increasing their score based on topical interest is a good way to gauge how interested the lead may be.
- Don't "double dip" with your download forms. This means that if every time they want access to a content asset, they fill out the form and give you the same information you already have, that you're increasing their score but will have gained no new information. Since you're already scoring points for the content view, this is double dipping and can skew your scores, giving you a false sales opportunity reading if it happens a lot. (Your mileage may vary.)

### Step 3: Scoring Conversations

Conversations differ from other online dialogues because they require active participation and unstructured input from your leads. These can be indicators of true engagement and several of them are truly the highest indicators of sales readiness.

Conversational exchanges include:

- **Blog comments, reviews or ratings.**

When a lead takes their time and effort to tell you what they think, they are more engaged than if they passively view your content. In a B2B sale, reviews and ratings are related to content and should be responded to thoughtfully. Each time a lead provides a comment, review or rating, she is opening the door for a conversational exchange. If you have the ability to score these interactions, do so. But also make sure to follow up.

- **Email responses.** During your nurturing and drip campaigns, you may receive replies. When the lead makes the effort to reply, this should be scored. If the reply is

### Conversation Score

Description	Score
Blog Comments	5
Email Replies	5
Live Chat / Web Promo	10
Inquiries	15
Phone Calls	25

more than a “thank you for the interesting article,” you need to follow up. This said, if the lead views a lot of your drip campaign content and makes the effort to respond to a specific piece, when they’ve never done so before, consider what type of follow-up may be an appropriate response to engage in further conversation.

- **Live chat and Web Promos.** Any time a lead is willing to interact with your while they are actively engaged on your website is a key opportunity to further qualify them. Because you have the ability to see what content they are viewing, have a plan for an appropriate invitation to enter the conversation. Make it as relevant as possible. In fact, if you can tie goals to these interactions, all the better.
- **Inquiries.** Your lead requests a demo, more information or for a sales person to call them.
- **Phone conversations are critical indications of interest.** Especially if they call you! However, the human touch is an important part of every complex buying process. Whether inside sales contacts the lead for further qualification, or sales calls to set up a meeting, phone interactions should be scored more highly than anything else besides the choice to buy from your company.

Here’s a view of the overall Online Dialogue Score:

Description	Rank	Points	Activity	Score
Webinar Registration	2	5	1	5
Webinar Attendance	1	10	1	10
Webinar Q&A	1	13		
Webinar Archives	2	7		
Opt-in / Subscribe	1	10	1	10
Download Forms / Landing Pages	2	5	2	10
Topical Clicks [identify issue]	2	5	3	15
Blog Comments	2	5		
Email Replies	2	5		
Live Chat	1	10		
Inquiries	1	15		
Phone Calls	1	25		
<b>Totals:</b>				<b>50</b>

## Stage 5: Scoring Reductions

For lead scoring to be truly indicative of buying intent, your scoring process must take into account the need for reductions. There are two areas of indication that a lead's interest is either waning or that they're not a likely customer fit.

The first reduction factor is inactivity. Due to the increasing length of buying cycles, as well as shifting priorities which can derail purchasing intentions, inactivity may only mean a delay, not abandonment by your lead. You'll need to test this factor to see how it best applies to your buyers, but a rule of thumb to start is to reduce their score if activity is absent for a period of at least a month. Reducing a lead's score by 10 points for each month of inactivity will ensure that once their interest spikes, you'll see a noticeable uptake in their scores, but protect against a false indication of a sales opportunity.

Beyond inactivity, it's necessary to score your leads for their demonstrated intent to become your customers. Depending on the type of content you're leveraging for your marketing efforts, these scenarios may, or may not, affect your scoring process.

In addition to career pages, discussed under website scores, you'll want to consider the following:

- The lead only responds to 3rd party content. If the lead is only responsive when your company sponsors a research or analyst report, then they may not be interested in becoming your customer. At least, not right now. There's always future potential, but until they show evidence of a shift in intent, their score should be tempered. This is important because content like special reports and white papers tend to be scored more highly than web pages, and there's the download form score to add to the content score.
- The lead is returned from sales to marketing for further nurturing. Depending on why the lead was returned, you should reduce the lead's score appropriately to monitor their re-engagement.

Some examples could be:

- Purchase is over a year from now.

- Budget was cut.
- Leadership change put the project on hold.
- Company agenda changed course.

Work with sales to determine a starting point for a reduction schedule and then monitor and refine the points subtracted as you see what it takes to re-engage the leads.

- Opt out. If the lead opts out, they should be removed from your database, or marked dormant until such time as they opt back in.

## Just Do It

Lead scoring is not an exercise in perfection for the simple reason that the buying environment and the nature of your buyers are facing continual change. The best course of action is to just get started. By approaching your lead scoring process in the five stages outlined above, you'll be able to build a solid foundation that can begin affecting your marketing results immediately.

The most important thing to remember is that lead scoring must be continuously evaluated and refined to improve marketing's effectiveness in creating sales opportunities. Create a process for sales feedback to help you learn how well you're delivering on the sales checklist and what shifts you can make in how you're scoring to improve sales outcomes. Close the loop.

The process of lead scoring also offers tremendous insights about your leads. Because you gain visibility on both an individual, as well as an aggregate level, you can proactively monitor their behavior around different problems, products and solutions to extract actionable intelligence. Learning where gaps exist in your content and how to apply content to buying stages to help leads advance in their buying process is coming up in the next webinar.

## Content Mapped to Buying Stages Powers Nurturing Results

### Chapter 2

Drip campaigns are automated nurturing programs executed over the long term of a complex buying cycle. The goal of a drip campaign is to build dynamic engagement that develops into potential customer relationships for your company via the content you share. This said, the fact that research finds 64% of marketing and sales executives dissatisfied with their nurturing program results proves that nurturing takes more than automating one-size-fits-all email blasts. A likely contributor to the dissatisfaction with nurturing programs is that only 38% of marketers say they create content for the various stages of the sales cycle. This means that marketers who focus on developing content more strategically have a huge opportunity to leave their competitors in the dust.

The art of designing customer-centric content that shares the right information at the right time is a core competency for a productive nurturing campaign. What needs to be understood is that nurturing leads is not quite the same thing as generating them. Lead nurturing programs begin once a lead gives you permission to communicate with them. The goal is then to keep their attention across the buying process and help

#### The Nurturing Cycle



prospects decide to buy from your company. To do that, marketers need to set expectations and deliver on them consistently over time so that leads begin to anticipate receiving your communications.

But nurturing programs don't stop there. For marketing to contribute to shortening sales cycles, nurturing programs must also move leads forward in their consideration to buy. And finally, nurturing programs play a key role in qualifying leads as ready and worth your sales team's time to pursue. It can't be emphasized enough that marketing automation systems play a key role in helping nurturing programs to deliver verifiable results. These measurable results will prove marketing's contribution to downstream revenues and increased pipeline momentum.

Since the majority of B2B buyers turn to the Internet first and push interactions with salespeople farther back in their buying process, marketers have to become very savvy about reading their leads' online buying behavior. The best way to interpret the intelligence gathered by your marketing automation system is to develop content designed to elicit responses from buyers during different stages of their buying process.

Creating consistent, fresh and valuable content can seem like an overwhelming resource drain to an already stretched-thin marketing department. This guide will show you five steps you can take to turn the creation of customer-centric content into a core competency and map that information for right-time delivery that keeps your prospects focused on the success you can help them achieve.

## Set Your Nurturing Mindset

If you're just starting to tackle true lead nurturing, you need to put it in the appropriate context. This means you need to split your focus. The end-goal of marketing is to provide your sales team with qualified sales opportunities who want to pursue a buying conversation. This can sometimes feel like a conflict when you set out to create a drip campaign across a lengthy sales cycle. Rest assured that the goal of nurturing matches the sales-readiness goal. But it's helpful to tune your focus to the entirety of the buying process while creating a drip campaign.

So let's get started.

## Step 1: Set Your Drip Campaign Parameters

To be most effective, each drip campaign needs a focus or theme. The idea of the monthly automated email blast, sent with whatever content is handy at that moment is not a drip campaign. A drip campaign will only generate the best results if relevance is the top concern. Sending general messaging designed for everyone lowers your chances of building engagement—and the relationships that result.

This means you need to select the type of buyer and the problem(s) they're solving as the foundation for the program. The easiest way to accomplish this is to use the information you uncovered during the Sales Opportunity Workshop you did when you worked with your sales team to create the definition of a qualified buyer for your lead scoring process. You'll also want to keep your sales-ready checklist handy. The beauty of custom content development for nurturing is that your content can be created to produce a response from your leads that helps you learn more about them at the same time they learn more from you.

Because a nurturing program is most effective when it's planned to run across an entire buying process, it helps to create a style baseline. This ensures consistency as you work to create the content for your program over time. The average duration for today's complex buying process is about 9 months. Since you'll likely be working on other programs, campaigns and events, creating a style baseline for each drip campaign can help you maintain consistency of expression over the long-term.

### Create a Style Baseline

Element	Use	Don't Use
Subject	You, CIO, IT, etc.	Us, We, Our, Company
Problem	Words prospects use, focus on internal biz challenges & benefits, etc.	Product names or external benefits that don't directly impact their business
Keywords	Long-tail search terms and phrases	Jargon or buzz words, innovative, leading, etc.
Value	Reduce or increase X	Intangibles—improve effectiveness
Proof	Customer success examples	Standalone statistics about feeds and speeds

A style baseline at its simplest is a chart of words and phrases to use or to avoid. The intention of a style baseline is to help ensure that your content and communications

are focused on your leads' perspective and not your company's. The key to creating continuous engagement lies in matching your information delivery to your leads' needs.

The figure above is a brief example of the kinds of things to include in your style baseline. Note the difference in focus from the left side to the right side. We're so used to writing about our products and companies that we often don't even realize we do it. The other thing that happens is that we get used to using terms that are industry accepted, but really convey no tangible value.

For example: *"Our solution will help improve your employee's effectiveness by 25%."*

What does that even mean? In regards to what? When you focus on exposing value in tangible ways, your buyers can immediately identify with the outcomes and will want to know more. When you don't, your leads will hear "blah, blah, blah" and move on. Ultimately, your baseline is a relevance guide.

### **The Relevance of Your Messaging is Critical:**

#### **Company Focused:**

*Our computing products provide significant benefits for preserving the environment, by improving energy usage, eliminating harmful substances, and reducing material consumption.*

#### **Customer Focused:**

*You need to reduce network costs. Going "green" has appeal...conceptually. But, you can't afford to lose speed to save energy. We can prove going green won't cost you one ounce of productivity.*

Which one of these is more engaging? The first message is generic and has no immediate connection with the prospect. The second message is more personalized. It recognizes a problem the lead may be grappling with, addresses relevant ideals and concerns and offers to prove what the company is asserting is true. If both of these messages offered a link to a content resource that extends the message, which link would you click on to learn more?

This is the challenge of creating engagement with your nurturing content. With the right focus, you can dramatically improve your nurturing results.



Your content should be designed to stir your leads' curiosity and get them to reach out to learn more. This is made easier when you use the words and phrases they use and proactively set their expectations

with the call to action in your drip campaign messaging. When leads respond, your content must deliver on the expectations your message set. This is accomplished by ensuring your content satisfies their curiosity, shows them why the information is important and useful, and delivers recognizable value that helps to create a memorable impression of their experience with you.

*Recognizable value is the takeaway from your content.* This is different than the call to action. The takeaway is the lasting impression from their experience with your content. It can be an idea they can now speak confidently to their peers and project team about. It can help them learn about a new avenue to explore to solve their problem. Or, it can offer validation that your expertise is instrumental in helping your customers succeed. The possibilities are many, but unless you develop content with the takeaway in mind, your content may miss its mark.

## Get Closer to Your Buyers

The results derived from a well-executed nurturing campaign include the establishment of a relationship foundation ready to be expanded during sales conversations.

### Step 2: Conduct a Targeted Buyer Q & A

This step does not necessarily mean you go ask your buyers directly, but it could. What it means is that you need to (as realistically as possible) put yourself in your buyers' shoes and work through the process of solving their problem from their perspective. Asking sales people to join you can help flesh out answers.

This figure illustrates the stages a prospect may experience across their buying pro-

cess. Beginning with Status Quo, they work their way up to Validation, which leads to the buying decision. Each stage has been seeded with questions to help you get started, but you should add new questions for each stage as they come up during your brainstorming session.

### The Targeted Buyer Q & A has several benefits:

- By assigning questions to stages, the answers are already mapped to the right place in the buying process.

## The Targeted Buyer Q&A

<b>Validation</b>	<ul style="list-style-type: none"> <li>• Why should I trust your company?</li> <li>• How long will it take me to get ROI?</li> </ul>
<b>Step Backs</b>	<ul style="list-style-type: none"> <li>• What if...???</li> <li>• What if end users won't adopt the new process?</li> </ul>
<b>Options</b>	<ul style="list-style-type: none"> <li>• What are the options or alternatives?</li> <li>• Who can add the most value to the project?</li> </ul>
<b>Research</b>	<ul style="list-style-type: none"> <li>• Are the best practices I can refer to?</li> <li>• Which experts can help me think strategically?</li> </ul>
<b>Priority</b>	<ul style="list-style-type: none"> <li>• How does this issue impact my industry?</li> <li>• What are my peers &amp; competitors doing?</li> </ul>
<b>Status Quo</b>	<ul style="list-style-type: none"> <li>• Why should I change?</li> <li>• What will happen if I don't?</li> </ul>

- Answering progressive questions can be used to flesh out story ideas for content development.
- Working the questions from bottom to top shows you how to build a story consistently across the buying cycle. You'll see exactly where transitions to the next stage occur.

- The very nature of the way the questions are designed steers you into focusing on how your buyers would answer them—not your company. And that helps you improve relevance.
- Try to gather enough information to create at least 3-4 content resources per stage.

## Planning and Mapping for Execution

Steps 1 and 2 have prepared you to create your content plan and then develop your drip campaign execution map.

### Step 3: Create Your Content Plan

Creating a content plan is a key element for your drip campaign's success. Armed with the answers to your Targeted Buyer Q & A, audit your existing content resources to determine what you already have and what you need to develop. By going through this process, you'll be able to easily pinpoint where you may have gaps in content that needs to be developed. You may also discover that your existing content has tried to do too much and spans more than one stage. Evaluate this content carefully to determine if it can work as a transitional piece—moving your leads from one stage to the next—or if the span covered only serves to confuse your leads about what to do next.

### Sample Content Plan

Drip	Description	Type / Format	Stage
1	Discussing the problem—Pros and Cons of solving	Education Article	Status Quo
2	Business Value of Proactive Change—Industry Trends	Education Article	Status Quo
3	Talk with industry Expert about the business impact of the issue—reasons to solve	Education Webinar or Video	Priority
4	Transcript of webinar with addition of your expertise	Expertise White Paper	Priority
5	Best Practice approach to addressing the issue	Expertise How-to-Guide	Research
6	Approaches from #5 in action—business value	Evidence Case Study	Options

The graphic above is an example of how to get started building a content plan. This can be done easily in a spreadsheet. Just enter all your content and then sort by Stage. Leave the drip numbering that indicates the order of use until last.

In the example; you'll notice that the first send is sharing content to educate people firmly in status quo who haven't yet decided to solve the problem.

The 2nd send is designed to build upon the first to increase their desire to explore solving the problem. The focus is still educational. In this plan, the company is taking things farther by using the 3rd send to invite their leads to hear about proof-points for solving the issue from an industry expert. The leads who attend the webinar or view the video are likely indicating they are actively aware of the issue and find it worth their time to learn more. Why? Because they're expending more effort to attend a webinar or view a video in comparison to scanning or reading an article that requires much less (e.g., sends 1 & 2).

The 4th drip is a transitional pivot point. Notice that you're using transcripts from the industry expert, but that you're also now including your company's secret sauce—your expertise—to expand on the ideas and show how your company adds value to a project. This content resource is a white paper which also requires an expenditure of time and effort to read.

As you can see, each drip campaign send builds on the last touch. This is why it's also important to make sure you provide links or access to the previous content so they can choose to catch up if they engage later on in the process. It's important to also consider which content to use as "nudge" content. This means sending an extra follow-up to all the leads who accessed one of your sends with an "exclusive" offer to view another content piece that extends the ideas of the resource they just accessed. An example is using drip 6 as an exclusive offer to all the leads who viewed drip 5.

When you're building your content plan and matching the content you have to the Targeted Buyer Q & A, you will discover gaps where you don't have the content you need to create a fluid story. Highlight each of these content ideas and create a content development calendar. By creating your content plan prior to launching your drip campaign, you'll be able to maximize your content development resources.

Review the content on your development calendar and look for obvious extensions

that can be addressed during research and development of the content. The goal is to maximize related deliverables.

Industries & Segments	Stakeholders	Formats
Phrases	Economic Buyer	White Paper
Examples	Technical Buyer	Article Series
Focus	End User	Video Script
	Influencer	Blog Posts
		Customer Stories

The key to efficient content development is to look beyond the creation of just one content resource when the same research effort—well planned—can actually produce multiple deliverables. One white paper should have enough fodder to produce a series of shorter articles, a video script and a few blog posts. Likewise, a content resource developed for one stakeholder, could be sourced for another during the research phase. The same idea, but presented in relevant ways for each audience. Likewise, you can expand your style baseline with fodder found during research with additional phrases, examples and slants on the original focus that helps with future content development goals.

#### Step 4: Map Your Drip Campaign

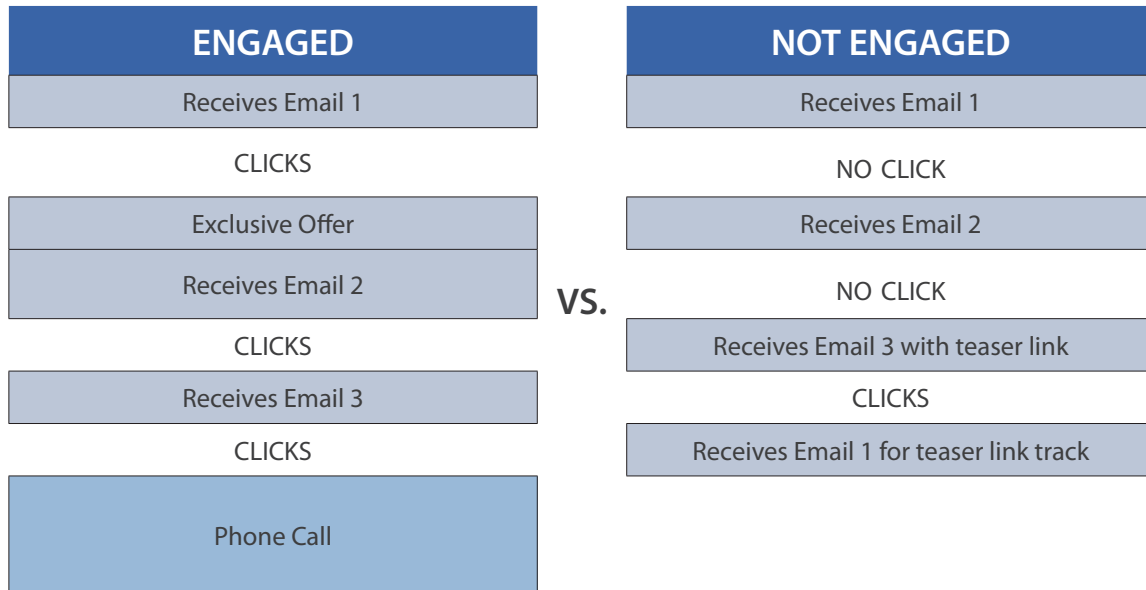
Once you know what resources you have available and which need to be developed along with the probable timeline for the deliverables, you're ready to map out your drip campaign. What you need to keep top of mind is that you're preparing to tell a continuous story across the buying cycle.

The graphic on the right is an example of what it means to tell a continuous story. First, you start by exposing the urgency of the problem. Then you educate your leads about why it's important to solve the problem and what could happen if they don't take action. Then you tell your company's sto-



ry in relation to solving that problem with a focus on the impact of your expertise—that they won’t get if they buy from the competition—and you back it all up with the evidence of your customer successes.

Finally, you show them how the project’s success will impact their company and their professional status and explain how well they’re positioned to address future issues coming down the pike—due to the value your company adds, of course. At this point you should be able to qualify the lead and transition them to the sales force.



All of this said, please don’t ever forget that buyers don’t always go through this process in a linear fashion. But that’s okay, as you can build in steps during your drip campaign designed to help them show you when they’re ready to jump ahead. There will also be the laggard leads who just aren’t paying attention. When you map your drip campaigns, you need to account for the leads who demonstrate engagement, as well as the ones that don’t.

Take a look at the Engaged campaign map on the left. The lead receives an email message, clicks on the link and views the resource. His view of the resource triggers an “exclusive” offer follow-up with a related resource. He doesn’t view that, but does open and click through on both the second and third sends. This is an abbreviated campaign, but all things considered equal, at this point it can be appropriate to have your inside sales team make a call to establish a personal connection, learn what other materials the lead may be looking for, or offer access to another “exclusive” content

resource.

It goes without saying that these calls should be designed to also help complete the information needed for your sales-ready checklist. The other important consideration when inserting phone calls into drip campaigns is not just to make rules about when they should happen, but to also make sure your inside sales team has a business reason to follow-up. This is why a related content offer works well. It's much better than calling a lead after a few interactions and asking if they're ready to buy. That type of call doesn't result in value for you or value for your lead. You want to promote engagement and credibility, not motivate them to opt out with a self-serving conversation.

Now, take a look at the Not-Engaged campaign map on the right. The lead has received two emails and not responded to either. In the third send, we include two resources. One is the link every other lead in this campaign is receiving. The second is a teaser link to another campaign. You see, your lead may be focused on solving the problem from a different angle or a different problem altogether. If you have multiple campaigns, including a teaser link can help you determine if their interest is best addressed by a different campaign. In the example, the lead clicked on the teaser link which told you to shift him into that campaign that has higher relevance for him.

## Drip Campaign Considerations

There are a few things you should take into consideration when mapping your drip campaign plans.

- **Frequency.** Today's buyers are very busy dealing with the responsibilities on their plates prior to the identification of a new problem to solve. Be respectful of their time and exercise patience. Once a month, twice at the most, is usually enough. You want to be helpful and add value.
- **Call to Action and Takeaways.** Design each content touch for both the call to action (click the link, register for the webinar, etc.) but also make sure you take into consider the impression their experience with your content will leave behind. The takeaway is often what influences their motivation to continuously engage with your communications.
- **Exclusive Content.** If all of your drip campaign sends provide links to content leads can find on their own (publicly available), your communications are less enticing.

This is why versioning is a great consideration during content development. Put an article with one spin on your website and create an article that addresses the same topic from a different angle for your drip campaign. Use the fodder that hit the cutting room floor during your customer success story development to create “exclusive” expanded stories you can share with your leads. It’s the equivalent of getting the inside scoop. And, who doesn’t like that?

- **Response planning.** Highly relevant drip campaigns are likely to get some replies and direct responses from your leads. The first thing to do is make sure to use an email send address that’s monitored so you don’t miss them. The second thing is to consider how you will respond if they do reply or reach out. For example, if they reply, “Thanks for the great article! This is exactly the information I was looking for” do you have a related piece you can send them a link to view? If it’s just a thank you, do you have a response reply designed to let them know you appreciate the time they spent reading your article? If you let those responses sit dormant, you’ve just lost an opportunity to make another impression.
- **Don’t Give Up.** Most marketers plan for a quarterly campaign or give up in favor of the “flavor of the week” idea. Don’t do this. Stay your course and exercise patience. Even if your leads aren’t clicking through, if they’re opening the email, they’re reading your messaging (hopefully). This is why the message in your drip emails is as important as the content linked to from them. Every communication is telling part of your story. You never know what will trigger the lead to respond, so give yourself a chance by continuing your drip campaigns across the length of a sales cycle and making sure every message counts.
- **Start with Sending 1.** Regardless of when your leads opt in to hear from you, start telling your story from the beginning. This means you’ll be sending multiple emails out each month as your database grows. Your original list may be on send 3, but starting new leads from the middle isn’t respectful of where they may be in their buying cycle. Origination sources may also help you learn where the lead should fit in the drip campaign cycle.

## Drip Campaign Effectiveness

Your drip campaigns are designed to cover buying cycles from beginning to end. However, measuring the business impact will need to be done more often to demonstrate effectiveness and contribution to pipeline. Now’s the time to shift your focus back to

the generation of sales opportunities and prove the value marketing is delivering.

## Step 5: Measuring Nurturing Program Results

Following are three measurements that help you verify your nurturing program's contribution to company success.

### Growth in Sales Opportunities

Every lead marketing hands off to the sales force will not result in a sale. This said, with lead scoring and responses to content designed for each step leads take during their buying process, you'll see improvements as you tweak and refine your campaigns over time. You need to measure several key metrics to show impact to sales acceptance, as well as pipeline.

This transition between marketing and sales needs to run both ways so you never leave a lead behind. If marketing is handing off a lead to sales and walking away, your company is missing a huge opportunity. Generating qualified leads is a combination of art and science. This means there's a lot of possible variance in the actual outcome. What you'll see with drip campaigns supported by lead scoring is a continual growth in the number and quality of sales-ready and sales-accepted leads.

The table to the right shows incremental progress across five months. The key here is to make sure you've closed the loop on the disposition of all the leads that move between marketing and sales. Note that not only are you handing over

### Measure Sales Progress

Description	Month 1	Month 3	Month 5
MQL Hand offs to sales	20	32	58
Sales Accepted	7	13	39
Returning to Nurturing	13	19	19
Marketing Driven Sales	0	1	5

290% more qualified leads, but that your sales acceptance rate has exploded by over 500%. I've seen results like these happen as a result of consistent nurturing programs that provide the value leads clamor to receive. The key factor here is that marketing and sales work together to focus marketing on continual nurturing and sales efforts on those leads ready to consider purchasing. The icing on the cake is that marketing can now point to their contribution to downstream revenues by following the leads they provide to sales all the way through purchase.

Before we move on, let's talk about those leads that sales returns to nurturing. This is where feedback is critical to refining and tuning the qualification process. Marketing needs to find out why the lead is being returned. The lead being unresponsive to your salesperson's attempt to engage them in conversation is quite different than the lead responding with a longer-term buying horizon or stating a different interest. When you know why they come back, taking the appropriate action on that feedback can mean the difference between re-engaging the lead in nurturing communications or in losing them to a competitor when they decide to buy at some future date.

Relevance is King. Respecting their place in the buying process gives your company's credibility a boost.

### Buying Stage Progression

When marketing is using content mapped to the buying process, they have a great opportunity to measure the progress leads make across the buying process. Because your content is geared for the incremental steps buyers make when considering a complex purchase, you can gauge their momentum.

There are a number of benefits from marking leads at stages. From an aggregate level, you know how many total leads you have in the campaign. Assessing how many are in each stage every month will show you whether or not your content is truly matching their needs.

This table shows what a campaign might look like given your leads' response to both your nurturing campaign and additional website resources after months three and

### Measure Pipeline Momentum

	Status Quo	Priority	Research	Options	Steps Back	Validation	Choice (buy)
Mo. 3	125	70	40	19	0	0	1
Mo. 5	110	95	55	27	1	3	5

five. What you want to see is a steady progression of leads moving from stage to stage. But, you'll also see leads that jump across stages. This is expected and something you need to watch for. Your lead scoring system will be instrumental in pointing you to the

leads who move faster than your campaigns.

A couple of things to watch for:

- Counts in one stage grow rapidly, but movement to the next stage is low.
  - Take a look at your content and make sure it's designed to transition leads to what's next.
  - Review the content you're trying to nudge them toward to see if it can be tied back more closely to the previous stage.
- The lead count in Step Backs grows and shows a stalling point.
  - This type of behavior can be evidence that your earlier-stage content is not answering all their questions, requiring them to go backwards and reassess.
- Leads are obviously jumping a stage.
  - Select several leads and review their activity. Try to determine why they leaped a stage.
  - It's possible that the content you've assigned to one stage belongs in another.

The basic thing to remember is that drip campaigns are dynamic. Your buyers needs shift based on their perspective and the ways in which they solve problems. Continuous refinement is necessary to keep in step with how buyers buy.

Measuring progression provides the proof to show that marketing is actively moving leads toward sales readiness. This information can be used to validate the importance of a combined focus on both marketing automation to drive your programs and the content you put in them that fuels the momentum of your pipeline. Continuous nurturing throughout the buying process is the key.

### What Engagement Levels Can Tell You

In addition to assessing your leads' stage in their buying process, it's helpful to determine how active they are with your content. More activity should mean higher engagement. A nurturing program needs to take into account other related content and ensure that you're providing pathways that help your leads explore on their own.

After all, if your drip campaigns are sending out once a month with one link, the way to speed up the momentum in your pipeline is to ensure they find more of what they came for when they click through.

### Is Lead Engagement Growing?

	Opens	Email Clicks	Other Web	Related Content	Interactive
Email 1	15%	50	12	4	1
Email 2	18%	62	20	11	4
Email 3	22%	73	37	22	9

In this table, you can see that, in addition to clicks in your email, your leads are reading more than what you sent them, as well as beginning to interact with you. It's great that they choose to view other web pages, but what you want to see is your leads reaching out to view other content related to the problem your drip campaign is oriented around solving. It's natural that they'll want to learn more about your company by exploring a bit when they first opt in, but over time you should see them tune into the story you're telling.

When you compare lead engagement levels with progression across buying stages, you should see a similar growth in related content views and interactions. Interactions are download form completions, newsletter subscriptions, webinar registrations, etc.

To get the most out of engagement, you need to make sure you provide the pathways. Linking your content together, providing access to related stories on sidebars and sending along "exclusive" offers all can help to expand engagement. If you see your Other Web count going up, instead of your related content count, either you're not showing them how to find it or it's not hitting the mark.

Armed with these evaluation tools, you should be able to pinpoint what's working and what's not. Lead scoring coupled with content designed for buying stages will help to make your nurturing programs successful. Because it's all based on generating the sales opportunities you defined with sales and the program is driven with content designed to match your buyer's perspectives, you'll be generating more sales oppor-

tunities in swift order. Just remember that when the content you put into your marketing automation system is developed with goals in mind, the results you achieve will be much higher than the general company-focused messaging that all your competitors are sending out.

# How to Optimize Lead Nurturing to Pump Up Your Sales Pipeline

## Chapter 3

Everyone knows the real proof that marketing works shows up when prospects and customers buy. The science of quantifying marketing's contribution to sales wins is still evolving even as your prospects are taking definitive control of how they buy.

The Web has jumped squarely in between your sales team and your customers, delaying conversations and even eliminating the need for many of the early-stage discussions that used to establish 1-to-1 relationships from the start. Often, this results in the perception of trying to tackle a buying process that looks more like the childhood game of Chutes and Ladders than an organized purchasing process. This is where lead nurturing, optimized with marketing automation, steps in to help marketers untangle the maze and provide prospects with what they need to know to make the best-informed purchase decisions.

The increasing role that the Web plays in your customers' buying process has necessitated that marketing's role and responsibilities evolve. Since marketers are engaging leads farther into the pipeline, the sales role has also shifted. What you'll find as you work to build momentum for your sales pipeline is that you'll have the marketing intelligence integral to enabling salespeople to step into relationships in mid-stream, fluidly, with confidence and armed to add immediate value that powers purchase de-

cisions. And that's the whole enchilada, so to speak.

In case you've made it this far and still think, *"that's not my job,"* consider these key research findings and compare them to the reality in your sales organizations. In their latest Sales Performance Optimization study, CSO Insights found that, "59% of companies with sales cycles longer than four months say that their ability to prioritize which leads to pursue needed improvement." Their research also found that, in 54% of those companies, salespeople were only able to get a lead to agree to an initial meeting half the time. That's a lot of wasted time and effort for your sales team, not to mention the impression left with your leads.

Enabling sales to have better conversations can evolve directly from the same work marketers are already doing to engage leads. Therefore, it makes perfect sense to harness your marketing automation system and marketing strategies to do both more effectively. There's never been a better time, or a more dynamic way for marketing to prove their overall value to the company.

### **"Set it and Forget it" is Not a Strategy**

In the first two webinars and guides, we discussed creating a lead scoring process and developing content mapped to your customers' buying processes. Those are the foundations you need to create a productive nurturing process. But you're by no means done. In fact, just get over it right now because you won't ever be done. Marketing is a dynamic process that needs continuous evolution to keep step with the changes in the way buyers buy, the nature of the problems they're solving and the shifts within markets and industries that promote continuous learning and innovation.

Optimizing your nurturing programs should become a staple process for your marketing department. This means adopting a perspective focused on producing better leads, not necessarily more leads. It means squeezing the most out of every dollar spent by reducing the waste that results when leads are ignored, ignore you or are lost. When you continuously work to refine and tune your nurturing programs, the ultimate reward is achieved—faster progression through the sales pipeline that results in more sales wins.

Research has proven that well-nurtured leads not only show a higher propensity to buy, but they spend more and stick around longer. This is because of all the residu-

al benefits created by truly buyer-focused nurturing efforts. This includes increases to credibility and trust, and a higher perception of value add—all attributed to your company by your buyers.

## How Marketing Automation Helps

Marketing automation is your lead toolbox. This technology helps marketers manage a number of processes that are truly too unwieldy and time consuming to handle well without it. These include:

**Distribution.** Sending emails is a core component of marketing campaigns. The act of releasing content into the ether is often seen as the definition of distribution, whether on your website, blog, microsites or elsewhere. However, the beauty of marketing automation is that it expands this definition beyond delivery to include the results of that distribution that go beyond surface indicators such as opens and clicks to the monitoring of responses. You'll also learn how well content distributed beyond your corporate web properties pulls leads' attention back to you.

**Visibility.** Feeding off the results of distribution is the increased intelligence gathering marketing automation provides to you about your leads' behavior in response. Not only can you see how segments of your lead database are engaging, but you can drill down to individual activity histories when you see a spike in scores. Reporting features allow you to slice and dice insights in numerous ways so you can "see" behavior and engagement from a variety of vantage points.

**Management.** When your distribution results in behavioral response that's visible within context, marketers can better manage (and nudge) the progress leads' make across their buying stages. Because your drip campaigns, auto responses and conversion events are integrated with your web properties, you see the whole picture and easily manage all the nuances involved. The cause-effect nature of marketing strategies plays a critical role in successful lead management.

**Dialogue.** Now that you can distribute, see and manage your marketing programs in step with the ways in which your leads respond, you will gain the ability to invite growing levels of interactions. Interactions are critical because they require an increased expenditure of effort from your leads in comparison to just viewing content. This includes commitments of time that play into the decision to register for a webi-

nar, the perception of credibility that tells your leads that it's worthwhile to complete a download registration form, and the willingness to enter into a live chat because they believe you can be helpful. Generating more interactions requires that you build relationships beyond the "just looking" response we all have to sales conversations.

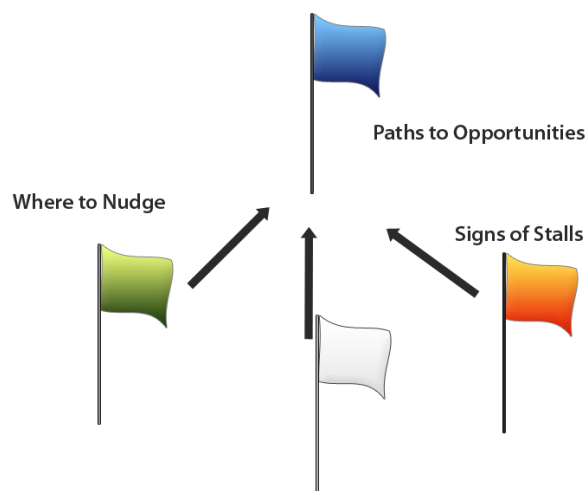
**Qualification.** Over time, all of these "tools" can be tuned to ensure marketers are focused successfully on handing off highly qualified sales opportunities. Not only does the lead scoring process—when mapped to an agreed upon sales opportunity definition—pay off, but marketers will find that the way they develop, distribute and monitor the content used in nurturing will help them learn more of what they need to know to ensure that each content experience builds an increasing propensity to buy.

### Step 1: Tune Nurturing on the Fly

Even though you've created a nurturing program designed to run across the entirety of your leads' buying process, it's likely to need some refinement along the way. Let's face it, even with the best research, insights, sales feedback and intuition, we won't get everything perfect. Because of the speed of change in today's business environment, even subtle shifts can render a great nurturing program less effective than it should be.

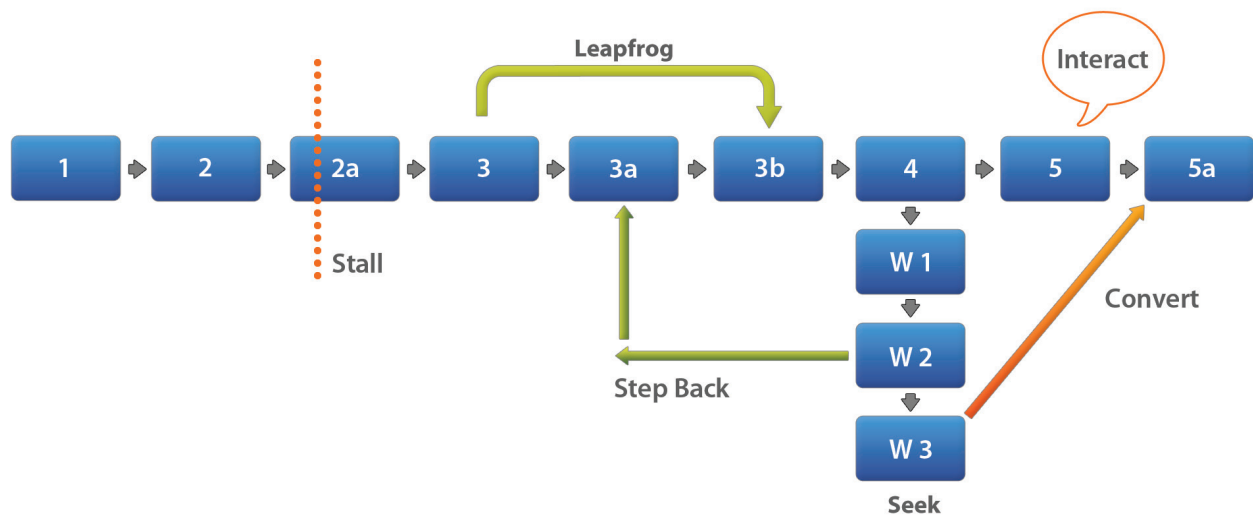
This is natural and why it's imperative to continually tweak and tune your nurturing programs to get the best results. Consider that you're trying to build a relationship with people that you likely won't ever meet personally. Even the best buyer persona can only give you an idea about the ideal way to approach your leads. What's great is that over time you build benchmarks that show which improvements really produce results and which weren't worth the effort.

The key here is that if you don't refine, you'll settle for what you've got now without ever testing the boundaries to be bet-



ter. Eventually your programs will become obsolete and irrelevant. But, by embracing change and using your lead toolbox, you can achieve optimal results in a much shorter period of time. Plus, continuous refinement pays off by helping to ensure that your marketing programs and content are always working in a relevant manner to produce the highest levels of engagement.

## Optimizing Based on Your Lead's Behavior



*This graphic depicts a nurturing program overlaid with the types of behavior that indicate opportunities for optimization based on the lead behaviors in response to it. Please note that these behaviors can occur at differing points throughout your nurturing programs and this is only a display for our discussion.*

Three of the behaviors indicate the need for corrective refinements (Stall, Leapfrog and Step Back) and three of them are indications of success that you want to learn to replicate wherever possible (Seek, Interact and Convert).

### Stall

A Stall is when your leads show some level of interest and then stop responding. Stalls can happen for a number of reasons, one of the most common being that you're mov-

ing too fast from one buying stage to another. Or, it could be that the content you used diverged from the story they were engaged in during the previous sends. This is why consistency and mapping content to buying stages is so valuable. A stall is not 10 people out of 100 who choose not to click on a link in one email. A stall is when you see a continued reduction in participation across a target segment. You'll need some benchmarking to measure this with accuracy, but sometimes you can diagnose the problem by taking another look at your content. If your leads are avoiding or bouncing from your nurturing content but still engaging with other website content, this is a strong indicator that you've got a stall to program momentum.

## Leapfrog

Over time you may notice that your leads consistently refuse to engage with or ignore a particular content piece or email message but engage with the ones before or after. Always remember to look at both the content and the messaging. Avoidance is a sure sign you've missed the relevance mark. But, don't remove that content from your program without first considering if you've just used it during the wrong buying stage. If your content is designed to answer all the questions your buyers have to resolve in order to make a purchase decision, then they may step back to get that information at a later stage.

## Step Back

As you can see in the graphic, a step back is when a lead whose behavior indicated they were in the later stages of their buying cycle returns to access content slotted into earlier stage nurturing. This usually means they are experiencing uncertainty or doubt about some aspect of the problem they thought they'd resolved. Or it could be that they leapfrogged past content they now realize they need. This can be another indication that you've either pushed them too fast across buying stages or that your content didn't cover all the salient points they needed addressed. Try to learn which and correct the issue.

Most of all, when you see Step Backs happening, make sure you've got content designed to turn leads around and get them back to making forward progress. You can do this by inserting another "touch" into your nurturing program to answer doubts learned from sales feedback. Correcting the problem may also be as simple as revisiting content to strengthen the right information for better retention.

## Seek

Now we've arrived at the successful behaviors that you want to replicate. Seeking is when leads move beyond the content your nurturing programs provide, initiating the exploration of additional, related information about the problem they're trying to solve. In the earlier stages, this behavior can indicate the problem is truly a priority they are interested in addressing. In a later stage, this behavior can be an important indication that their buying interest is intensifying.

Review the content that your leads are accessing in addition to your nurturing content. Assess the navigation paths, hyperlink or description wording and the order of content accessed to determine patterns for replicating this behavior in relation to other groups of content. Remember that if your leads only ever respond to your nurturing content, without reaching out to learn more, it's very hard to drive engagement levels high enough to increase their propensity to buy.

## Interact

Interactive behaviors are the highest levels of commitment you can gain from your leads prior to their conversion to sales opportunities. The more interactions you can entice your leads to participate in, the higher the potential for establishing the solid foundation for a future customer relationship. Within your nurturing programs and website should be a number of opportunities for online dialogue. These include, but aren't limited to download forms, webinar registrations, email replies, and newsletter or content series subscriptions, surveys and inquiries.

When you measure a high level of response to an invitation for online dialogue, you want to look closely to understand why this one interaction is stimulating more response than others. Watch for what works and then determine the key elements and use those ideas to refine your other interactions for better engagement. Look at landing pages, titles, descriptions, offers and more to create improvements across the board. Update your buyer personas and lead scoring processes to reflect what you learn.

## Convert

All businesses should have pre-determined conversion events that trigger sales han-

doffs. When you see a spike in conversions, diagnose what made that happen and create more of these reactions. Review the navigation paths converting leads used as well as their overall activity. Talk to salespeople, as well.

## Step 2: Pump Up Your Online Dialogue

Because interactions are so important to creating levels of engagement that shorten buying cycles, revisiting them often to assess what works and what doesn't is a critical step for optimizing your nurturing programs. But it's also important to realize that you need to make sure that when your leads reach out to you, you maintain a steadfast intention to be helpful. An online interaction that morphs into a sales pitch is likely to send all but your latest-stage leads running the other direction.

### Live Chat

Enticing your leads to engage with you in a Live Chat session is an art form during marketing that's quite different from a service or support experience. When your customers use Live Chat for a service or support transaction, they know what they want to ask you. Consider the difference if you're browsing information as a prospect and see a Live Chat button. This is equivalent to a salesperson approaching you upon entry

to a store and asking if they can help you before you know what you want. We've all been there. The usual response is "No thanks, just looking."

To get beyond that with Live Chat, you need to approach the interaction from a needs perspective. Given the web page they are on now, what other information might they be interested in? As you create and deploy your web content, it's a good idea to also create several conver-

Stage	Engagement Starters:
Status Quo	Would you like to report on X?
Priority	Would you like to know how others are dealing with this issue?
Research	Our CEO is talking about this issue in a webinar on Tuesday, would you like to sign up?
Options	One of our customers used this feature to...
Step Backs	Would you like to know how we mitigate risk?
Validation	You can see how this works in our online demo...

sation starters that can be used in a Live Chat session on that page. Whatever you do, don't pitch your sale. Instead, if they're later stage, perhaps offer to connect them with a subject matter expert. Think about what it will take to get them to the next step. Good practice for this is, funnily enough, Twitter. No one wants to read a novel in a chat box. Create short, engaging snips that invite your web visitors to respond.

## Surveys

Most companies think of surveys as soliciting feedback about them. Customer satisfaction surveys are a prime example. For use in marketing, surveys can provide valuable insights, higher engagement and fodder for research reports and other content development. The key to using surveys during marketing is to think about things your leads would like to learn from others like them who may be facing the same problems. One way to drive higher engagement is to promise a forthcoming report based on the results. Another is to use a survey as information that will be discussed in an upcoming webinar to drive pre-webinar engagement and higher registrations.

What you can learn from surveys positioned to address your prospects' concerns and priorities is how they think about them. If you design the choices in answer to a single question strategically, you may learn about a hot button you haven't yet addressed in your content. You may also see a trend that indicates the problem is losing or gaining importance for your leads. These insights will help you tune your nurturing on the fly to ensure continued relevance. It's probably becoming clear that everything you do with your nurturing programs is about staying in step with your buyers as their needs evolve and change over time.

Make sure you design your surveys with learning goals for both you and your prospects and they'll yield fantastic insights that can help you encourage prospects to take the next step in their buying process. When you present the results, make sure you add your company's expertise to the interpretation. Presenting a "special report" based on the survey is a terrific opportunity to showcase how your company can impact a concern, deliver better outcomes and/or mitigate risk that slows decisions.

### Step 3: Show Prospects You're Listening

Showing prospects you're listening is a great way to differentiate your company. Many companies have taken automation literally and forgotten to show their prospects that

engagement goes both ways. They send out communications month after month without any indication that they've noticed anyone has ever responded to them. Nurturing really needs to be treated as a springboard to interactive exchanges, not just as a facilitator of clicks to your website.

Here's an example. A prospect received three nurturing sends and then ventures beyond the content offer of the last send to explore more related content. This triggers an auto response that sends the prospect a message acknowledging their interest and offering an "exclusive" related piece of content that's not publicly available. When the prospect arrives on the web page to view the content, there's a Web Promo note that thanks them for their continued interest. It's even better if it's "signed" by their salesperson. Make it personal, be conversational and human. Don't scare them away with a sales offer.

The point here is to look for demonstrations of behavior that present opportunities to show your appreciation by delighting your prospects with something unexpected. To be clear, the unexpected should be something the person will perceive as valuable and relevant. The best way to do it is to expand the story you're already telling and that they're engaged in following.

You'll likely find several scenarios to use over the course of the buying process. This is also a technique that can help you nudge a prospect into the next stage of their buying process by increasing your credibility with them. Always remember that marketing is an expression of what their experience might be like once they choose to become your customer.

#### **Step 4: Power Your Sales Handoffs**

Once you've gotten lead scoring and nurturing programs underway, you'll see a faster generation of sales-ready leads that meet the definition marketing and sales agreed to during the Sales Opportunity Definition Workshop you completed at the beginning. Where before you might've just handed over the lead and said, "All yours," now marketing can provide salespeople with so much more.

Salespeople often appear like cats with shiny-object syndrome to marketers. This is because they're under immense pressure to meet short-term goals. All the improvements you've made to your marketing process may seem wonderful to you, but it's

likely that your sales team isn't so easily convinced. It's up to you to not only prove your leads are viable opportunities, but also to ensure salespeople spend more time selling than researching their "foot in the door" strategy. Trust me, if you can accelerate their time to relevant conversations that result in forward movement with the sales opportunities you provide, they'll begin to rely on your efforts to help them.

Creating powerful sales handoffs is also facilitated by your marketing automation system. This means you can deliver a lot of information to sales without spending a lot of time doing so. Marketing automation systems enable you to provide lead-specific information such as:

- The lead's score and what built it.
  - Activity histories and website visit replays provide instant insight into the lead's interests, frequency of interactions and online dialogues to date.
  - Demographic profiles provide contact information as well as some of the must-have answers on the sales checklist.
- Sales-side nurturing.
  - Post-handoff, marketing can continue to nurture the lead using personalized email templates from the salesperson.
  - You can also "seed" email templates with content offers that the salesperson can choose to send by themselves at intervals they decide.

All of these activities on the sales side will continue to be accrued to the lead's profile, enabling marketing to monitor and follow-up with the progress of sales-ready leads generated by nurturing programs. This way, not only are you helping sales, but they are helping you to add to your intelligence for further fine-tuning of your nurturing programs.

There are also two key areas where marketing can impact the ability of the sales team to step seamlessly into their relationship with the leads you hand over. Don't panic. You already have what you need to create these materials. Building these tools into your nurturing program development process from the start will increase your efficiency in providing them to sales.

## Seed Sales Conversations

Your buyers don't necessarily make the distinction between marketing and sales interactions. They don't really care. What they care about is how they'll solve their problem in the best way with the least risk. Seeding sales conversations is about providing sales with content, collateral and personalization insights that they can use to produce a "tell me more" response from the lead. This is most effective when built around content the lead can't find anywhere else.

The sales content and collateral can include:

**Customer Scenarios and Personalized Expertise.** These are industry-focused, extended customer success stories that share more of the overall project process and how your expertise impacted the outcomes. When you're developing your public-facing stories, you can also collect information from the customer and the related salesperson to put more meat on the bones in this extended version. Include things like hiccups and learning discovered during the projects that will help your salesperson demonstrate how valuable your expertise is and how fully you understand the lead's industry and business challenges. Focus on addressing industry trends and issues relevant to this lead to enable salespeople to put a "personalized" spin on the story they share.

**Story Follow-on.** Based on the triggering event that prompted the sales handoff, cut to the chase and provide your salesperson with a content offer that he can send to introduce himself—either prior to or after their initial phone call. Since you know what parts of the storyline the lead has accessed, providing the next piece in the series to your salesperson should be a piece of cake. And the lead will appreciate that the salesperson is in step with their place in the buying process, instead of backing up and asking the lead to start over. Being able to enter the relationship fluidly means there's no hard stop to the momentum of moving toward purchase.

**Proprietary Research.** This can be facilitated in a number of ways, the easiest of which is based on insights gleaned from your customers as they use your products over time. Presented on an aggregate scale, you can enable your salesperson to demonstrate the strength of your company's expertise on a broader scale than just one customer story. This type of content also enables you to showcase the hard-hitting business impact of your expertise, methodologies and services—in addition to your products

and solutions.

## Sales Conversational Briefs

Quite often, salespeople reinvent the wheel when they receive leads because they don't have any clear insight into what efforts marketing has undertaken on their behalf. For the lead this is akin to being passed from one support rep to another where each one says, "Can you please explain the problem." The other problem often experienced from a buyer's point of view is the sales call without a business value. An example of this is the "Are you ready to buy yet?" call. You can eliminate these instances by providing your salespeople with conversational briefs. After all, marketing has done a ton of research to create the nurturing programs that generated demand in the first place, right?

Elements of conversational briefs are based on the sales opportunity definition workshop combined with the targeted buyer question and answer session used to map your content to the buying process:

- **Nurturing Story Overview.** A synopsis of the story your nurturing touches are telling leads over time. Salespeople don't want to read a novel. Give them the Cliff Notes version. This is easily compiled using the outlines that drove your content development projects or the descriptions you used when you placed the content online. The key is to make sure to include the takeaway the content was designed to deliver to your leads.
- **Questions and Answers.** Clean up your targeted buyer question and answer session notes and provide them to salespeople. If you included sales in this process you should be right on target. Think of this as a conversational cheat sheet. It's also a great way to discover if the answers have changed over time.
- **Talking points.** Salespeople often lead with product features and all about the company presentations. Talking points are based on the buyers' perspective and about discussing how they'll achieve the business outcomes they need. Make a list of these outcomes. Under each one include bullets of information your salesperson can use in conversation to add value to the discussions they have with buyers.
- **Resistance Factors.** This one could come straight from your Q & A session, but will fare better if it's developed from actual street-level sales feedback over time. Resis-

tance factors are best addressed with “tribal” knowledge from those who experience them first hand. Memorializing the most persistent objections and how salespeople deal with them best will help your entire sales force do so consistently. As an added bonus, these can also become ideas for relevant content development.

- **Conversational Snips and Voicemail Prompters.** This is a list of phrases, questions and openers that can help your salespeople get conversations started with buyers. Focus on value. Salespeople want to know right off the bat if the lead wants to buy and if they will do so in the near term. This is not the best way to start a conversation. Neither is the standard of, “so tell me about your business situation.” This drives buyers crazy. Help your salespeople lead into a conversation with value and relevance. These don’t have to be paragraphs, more idea generators about things this particular segment of prospects are interested in. You can likely extract several from each piece of content you develop for your nurturing program.
- **Email Messaging.** You’ve likely been on the receiving end of an email that reads like this:

*Hi Joe,*

*I noticed you downloaded our white paper last month and I wanted to set up a call to introduce you to our product. Attached is our data sheet. How’s next Tuesday at 3PM?*

*Sincerely,*

*Sally Salesperson*

How fast did you hit delete? Did you even remember which white paper you downloaded? The trick to doing this efficiently is to create versions of email messaging that contain variations of value propositions presented in a conversational way. It’s also helpful to create these specifically for follow up to late-stage content since these are most likely to be used in conjunction with sales communications. Create them for all sales collateral, as well. If you make this a step that’s completed when the content is developed, it’s much easier and takes little additional time. Wouldn’t you rather receive a message like this:

*Hi Joe,*

*I noticed you read our white paper about how to cut costs with server virtualization. We've helped companies like yours save as much as 40% in only 6 months. I've got some ideas about how you can do that, too. When's a good time for a 15-minute call?*

*Sincerely,*

*Sally Salesperson*

## Step 5: Re-engage and Restart

Obviously, all the leads who appear to be qualified and sales ready will not result in short-term sales. Even though you should see a transformation in marketing's contribution to revenue, circumstances change, leads get misread and buying intentions get delayed beyond the short-term parameters necessary for sales attention. It's imperative to close the loop and pull these leads back into your nurturing programs. Research shows that it's likely 45% of them will buy within the next year and you certainly don't want them to buy from a competitor.

Companies spend real dollars to acquire and nurture leads. Your future customers are also evaluating your willingness to stick with them as they work through the complex process of buying. In fact, in a recent IDC report on Sales Enablement 3.0, a director of IT for a pharmaceutical company stated, "Now is the perfect time to test vendors to determine if they're looking for long-term relationships or short-term transactional gain. [Vendors] that understand the current climate and continue the relationship are the ones that will remain on my preferred list and deserve a degree of loyalty." There's a definite payoff for hanging in with your leads over the long term.

Clearly establish a rules-based process for enabling salespeople to return leads to marketing for further nurturing and re-engagement. Whether that's upon a buyer's stated delay of intent to purchase or based on 30 or 60 days of dormancy in the salesperson's pipeline, marketing needs to reclaim leads not likely to buy in the short term. Require sales to provide the reason for the return and any insight about the need for the lead to be placed in a different nurturing program or returned to their previous place in their original program.

Once marketing has reclaimed the lead, they must re-engage them and restart their

interest in continuing to receive your nurturing content. This is easiest when your content is valuable, regardless of their timing to buy. This said, there are a few nuances to consider:

- **Address the handoff.** Instead of just reinserting the lead into the nurturing program, it's a nice touch to reset the relationship with a special re-engagement message that invites them to continue to engage with you and reach out whenever they need anything more. You may also choose to have this message "sent" by the salesperson upon the return of the lead to marketing.
- **Slow the "flow."** If they were on a "fast track" and receiving several emails a month, it's wise at this point to reduce the sends to once a month to allow them space to focus on their highest priorities while continuing to provide valuable information they'll need whenever solving the issue regains priority status.
- **Don't start over.** Do not put them back into the beginning of the nurturing process. They've already learned a lot from your content, so keep building the story.
- **Reset their score.** When a lead is returned to nurturing, it's necessary to reset their score to make sure they don't inadvertently trigger themselves back into the sales process before they're ready. Retain their activity history, but reduce their score by at least half. This way you'll be sure to know when they actively re-engage, indicating they could possibly become sales-ready in the near future.

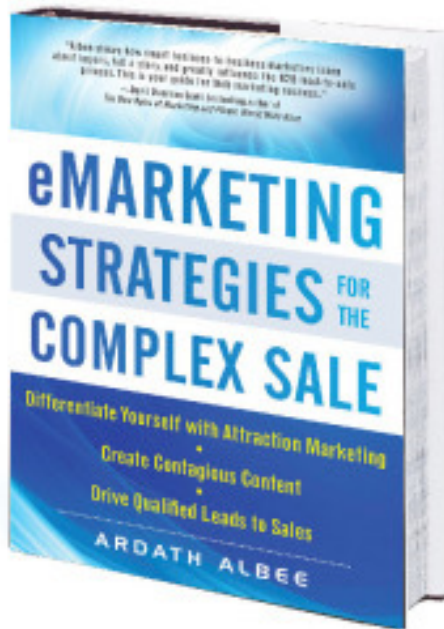
## Ongoing Optimization Pays Off

As you can see, there are numerous ways to tweak and tune your nurturing programs to help you power more sales opportunities into the pipeline. Marketing automation plays an important role as the infrastructure that enables your nurturing program execution. Lead Scoring working in synch with content that drives buying process progression and empowered sales handoffs will prove that marketing plays an increasingly valuable role in contributing to downstream revenues.

Even better, by proactively improving your nurturing programs over time in response to lead behaviors, the results will continue to improve. The better the quality of the leads transitioned into sales activities, the more willing salespeople will be to accept marketing's help. And that alignment of resources can make a huge impact on your company's ability to acquire new customers and sell more to the customers you already have.

Also from Ardath Albee...

## eMARKETING STRATEGIES FOR THE COMPLEX SALE



*Power your eMarketing results by mastering how to...*

- Build a foundation for eMarketing strategies based on buyer perspectives.
- Use a buyer synopsis to develop personalized content.
- Transform prospect engagement with natural nurturing.
- Create a contagious content structure for competitive differentiation.
- Generate increased pipeline with attraction marketing.
- Facilitate faster prospect progression to sales readiness.
- Perfect the transition of sales-ready leads to your sales force.
- Measure the impact of eMarketing programs against business objectives.

Order Online at: [www.emarketingstrategiesbook.com](http://www.emarketingstrategiesbook.com)



### *About the Author*

Ardath Albee is CEO and B2B marketing strategist for her consulting firm Marketing Interactions, Inc. For almost a decade she's helped companies increase their marketing effectiveness by generating more and better leads for their sales forces with e-marketing and content strategies. She writes the popular Marketing Interactions blog and her book, E-Marketing Strategies for the Complex Sale, will be out this fall from McGraw-Hill.