BUILDING AN EFFECTIVE LEAD NURTURING STRATEGY

Stacy Bouchard – Appleton HubSpot User Group
August 21, 2018

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TODAY'S AGENDA

- Why is lead nurturing important?
- Types of lead nurturing campaigns
- Building an effective campaign
- Best practices

Why is lead nurturing important?

LEAD NURTURING

The process of building relationships with prospects with the goal of earning their business when they are ready.

73%

of your leads will not be sales-ready when first generated

Nurturing is exactly what it sounds like – helping someone grow.

Lead nurturing is like dating. You have to spend time establishing a relationship by building trust.

Types of lead nurturing campaigns

Buyer Journey Stages

Awareness

Buyers seek to **understand a challenge** they're experiencing or an opportunity they want to pursue.

Their effort is on **learning as much as possible** about potential solutions.

Consideration

Buyers have **clearly defined the goal** or challenge and have committed to addressing it.

At this stage they're **evaluating alternative solutions.**

Decision

Buyers have **decided on a solution category** and one that best meets their needs.

Their focus is on **selecting the best partner**.

TYPES OF LEAD NURTURING CAMPAIGNS

1. Engage
2. Educate
3. Close
4. Retain

1

Engage

- Welcome
- Top of mind
- Re-engagement

1

Engage – Welcome Campaigns

- New leads – any source
- Remind them why they converted
- Brief, straightforward messaging
- Goals are awareness and engagement
- 3–4 emails over 4–6 weeks

New Message

Recipients

Subject

Hello {first name},

Thanks for connecting with us recently. We're sending you a quick note to welcome you to the conversation.

We'll occasionally share new offers and resources you may find helpful. For starters, here's our full Resource Center. It's rich with content for (target persona) who are ready to transform their business.

(List of Resources)
eBooks
Videos
On-demand webinars
FAQs

Enjoy!
The (your company name) team

1

Engage – Top of Mind Campaigns

- Early stage leads
- Engage on regular intervals
- Newsletters, blog in review
- Consistent schedule

1

Engage – Top of Mind Campaigns

- Example

1

Engage – Re-Engagement Campaigns

- Leads that have stopped engaging
- Segment by persona, last content engaged with
- Include CTAs
- 3–5 emails over 60 days

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Hi Advisor,

Your clients are the essence of your business, and discovering new and refreshing ways to engage with them can help you build trust and increase retention. Our **Smart Risk Control Blog** not only uncovers the latest investor trends, news and financial strategies, it can help you understand and connect with clients no matter where they are in their financial journeys.

These three blog articles give you a glimpse of what you're missing by not subscribing. Check them out. Then, be sure to **sign up** to get the latest insights sent to your inbox each week.

- *Social In-Security: Helping Your Clients Plan for an Uncertain Future*
- *Practical Advice for Clients Who Inherit Money*
- *3 Things You Can Do Now to Build Relationships With the Next Generations*

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To see a list of all the latest blogs (and read a few, too), **go to smartriskcontrol.com/blog**.

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Top 5 ADVISOR INSIGHTS for 2018

Hi Advisor,

We understand you're busy, so we'll make this quick. When you're looking for convenient access to quick insights, we've got you covered. We offer a wide spectrum of topics to help you and other top advisors benefit from our experience, research and ideas.

Check out these resources rated as the top 5 based on advisor responses.

1. *Step by Step Guide to Helping Clients Achieve Financial Security and Satisfaction in Retirement*
   One-third of a person's lifetime can be spent in retirement. Help clients alleviate concerns and confidently embrace the future with this 7-step guide.
2. *All Guarantees Are NOT Created Equal — A Comparison Guide to Annuities*
   Some annuities are notoriously confusing. Use this simple, straightforward guide to determine the best approach for offering upside potential and downside protection to clients who are considering annuities.
3. *3 Myths About Millennials And The Truth Behind Them*
   There are many opinions about Millennials. Many popular beliefs and stereotypes, as they relate to finances, are debunked in this interesting report.
4. *Building Relationships With the Next Generation — Infographic*
   Many beneficiaries do not continue to work with a parent's advisor upon receiving an inheritance. Here are easy tips to engage and build trust with the children and family members of your clients.
5. *The Psychological Impact of Retirement*
   Many things fuel uncertainty in retirement; finances are just one of them. Yet they all play a role in successfully navigating the Golden Years. Better understand what your clients are confronting in this white paper.

Let me know which resources you found most valuable and if you'd like to talk more about any of these issues or strategies for engaging clients.

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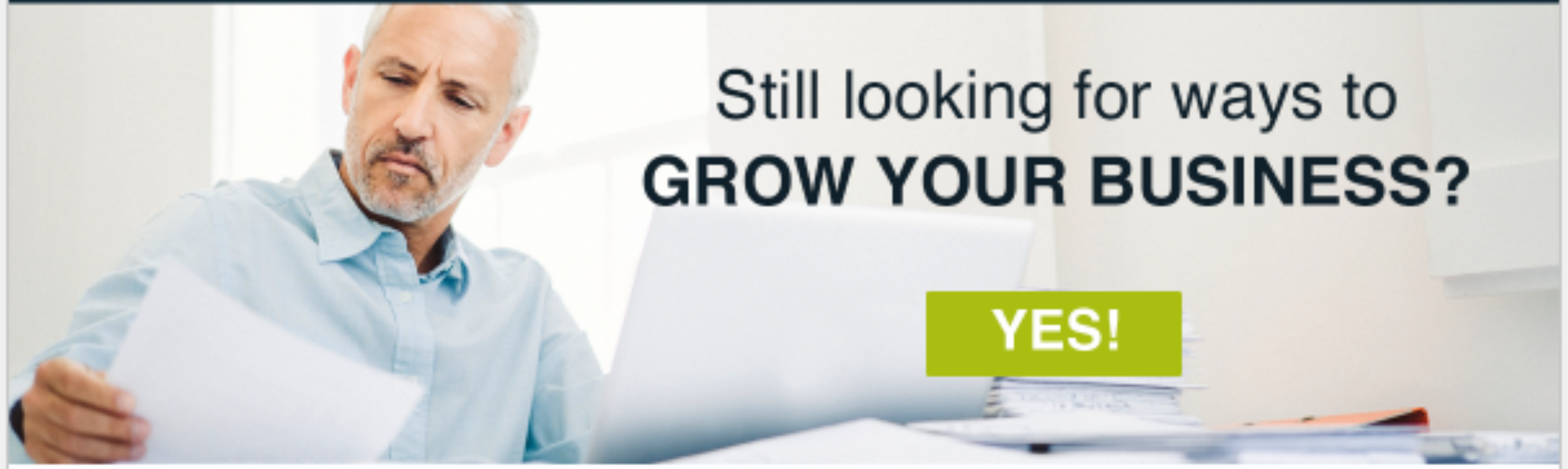


Hi Advisor,

We know there are a lot of people vying for your attention, and your clients definitely come first. Still, you need to take time to stay relevant and in step with your clients changing needs.

On smartriskcontrol.com we make it easy to uncover:

- New strategies
- Client attitudes at various stages of life
- New and innovative products
- Changing trends
- The impact of global instability
- And more

Many top advisors have found our resources extremely helpful, but we haven't heard from you in while and would hate for you to miss out.

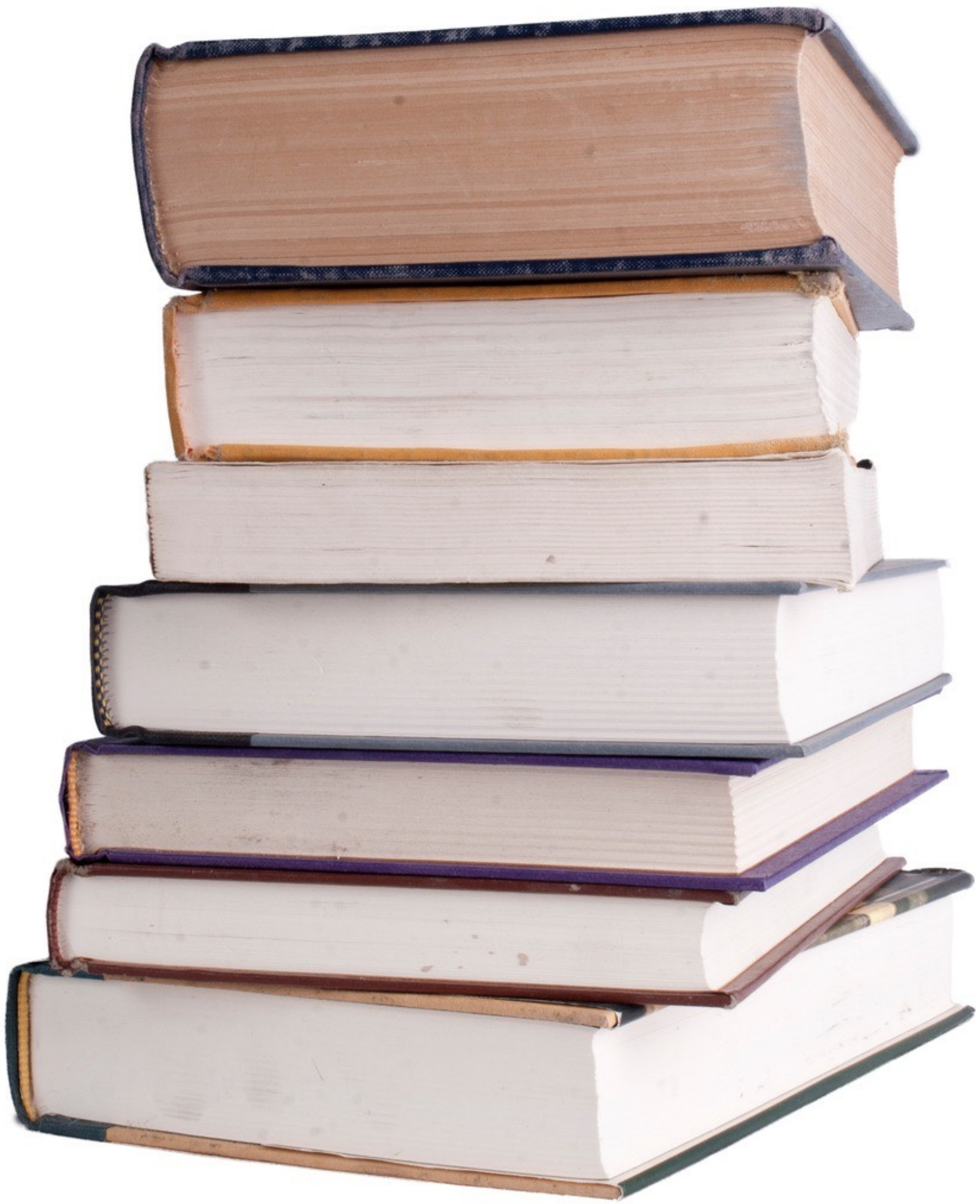
Did you still want to receive emails about the latest resources? If so, simply click the link below to confirm you want to stay in touch.

Yes! Keep Me Signed Up

2

Educate

- Product or service
- Competitive drip



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Educate – Product or Service Campaigns

- Leads in consideration phase of buyer's journey
- Focus on prospect's pain points and how your product/service can help
- Case studies, testimonials, in-depth white papers
- 3–4 emails over 60 days

2

Educate – Competitive Drip Campaigns

- Leads in consideration phase of buyer's journey
- Highlight advantages of using your product/ service
- Identify disadvantages of not using
- Refrain from competitor bashing
- Customer testimonials work well

3

Close

- Thought leadership
- Promotional drip

3

Close – Thought Leadership Campaigns

- Leads in late consideration or decision phase of buyer's journey
- Reinforce your organization is the right choice
- Press releases, industry reports, trade journal articles
- Collaboration with sales team

3

Close – Promotional Drip Campaigns

- Leads in decision phase of buyer's journey
- More widely used in B2C
- Special pricing, additional features, coupons
- Collaboration with sales team

4

Retain

- Customer onboarding
- Upsell drip
- Renewal

4

Retain – Customer Onboarding Campaigns

- Begin delighting
- Training resources, timelines for kickoffs, FAQs
- Supplement with human touch

4

Retain – Upsell or Cross-sell Drip Campaigns

- Best prospects are current customers
- Introduce to new products or services
- Focus on why or how new offering helps customer
- Segment carefully

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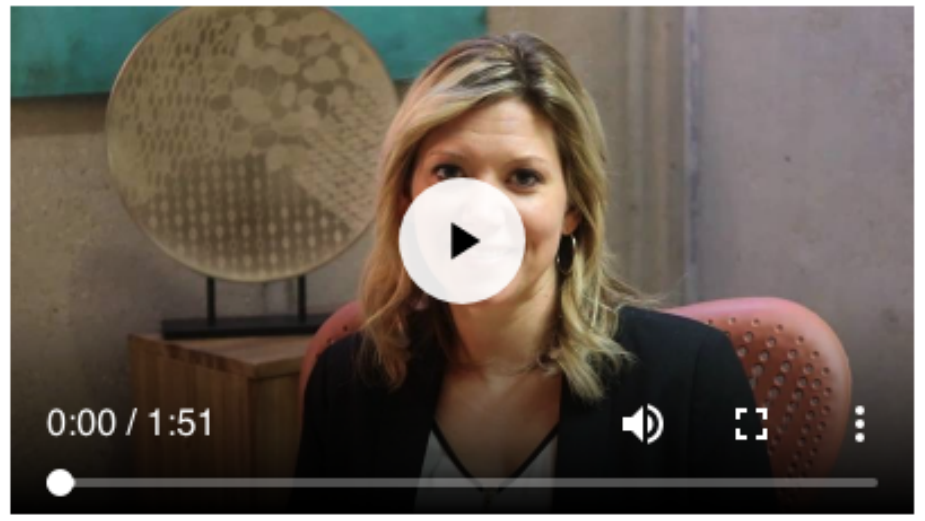
Your Proposals are Boring! Here's How to Make Them Stand Out from Competitors'

Hey there!

What happens after you deliver your proposals to a prospect...crickets? Wish you could tell more of your company's story – not just what your product or service costs? Want to know what prospects are most interested in? Now you can fuel your proposals with energy – and see how prospects are interacting with them, with **customizable proposal pages**!



Proposal pages are online, shareable web pages that enhance, expand and support your company's sales proposals. You can customize them for each prospect to offer helpful content, personalized videos and more, all directed at their specific company. We create templates that allow you to set up individual pages quickly and effectively!

Want to learn more about getting started with a customizable proposal page for your sales team? Watch the video above and contact your Weidert Group consultant for more information.

Cheers!
Jessica

Jessica Janda
Marketing Manager

HubSpot PLATINUM Certified Agency PARTNER

4

Retain – Renewal Campaigns

- Best for SaaS or licensed products
- Gentle reminders that contract needs to be renewed
- Begin 4–6 weeks before end of contract
- Supplement with human touch

Building an effective campaign

BEFORE YOU BEGIN

- Define personas
- Map their buyer's journeys
- Create content

STEP 1

Define your goal. Choose appropriate campaign type.

STEP 1

Define your goal. Choose appropriate campaign type.

STEP 2

Segment, segment, segment.

STEP 1 Define your goal. Choose appropriate campaign type.

STEP 2 Segment, segment, segment.

STEP 3 Map out lead nurture.

STEP 1 Define your goal. Choose appropriate campaign type.

STEP 2 Segment, segment, segment.

STEP 3 Map out lead nurture.

STEP 4 Execute.

STEP 1 Define your goal. Choose appropriate campaign type.

STEP 2 Segment, segment, segment.

STEP 3 Map out lead nurture.

STEP 4 Execute.

STEP 5 Test and optimize.

Best practices

BEST PRACTICES

- Start small
- Create content to support lead nurturing
- Use calls-to-action
- Create targeted messaging – nurturing is not blasting
- Use personalization
- Use progressive profiling

WANT TO LEARN MORE ABOUT LEAD NURTURING & WORKFLOWS?

Questions?

THANK YOU

very much.