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Getting Started with Lead Nurturing

Introduction

As humans, we're not always easily persuaded. We need evidence and testimonials from others who have gone before us. We must be "courted" if companies want our business.

Though complex and initially overwhelming, lead nurturing turns cold, unknown prospects into warm, ready-to-buy customers through targeted campaigns and helpful content.

On average, it takes eight "touches" (or interactions) before a customer will book a meeting with a sales representative. By enabling an effective lead nurturing campaign, you prime those leads to engage and increase the likelihood of further movement down the sales pipeline.

In this guide, we explore the basics of lead nurturing, the importance of maintaining a well-oiled program, and a list of actionable steps to integrate your efforts into your existing sales and marketing process.

What is Lead Nurturing?

Lead nurturing is the process of developing and reinforcing relationships with buyers at every stage of the sales funnel.

Lead nurturing is a critical aspect of marketing because it enables the brand to stay in front of prospects. Nurtures provide prospects with relevant content while gauging their interest in purchasing your product/service and increasing their lead score until they qualify to move on to the sales team.

More targeted than traditional email marketing, lead nurturing focuses on specific parts of the buyer's journey to guide prospects to purchase. Because of their targeted nature, nurture campaigns automatically trigger messages at specific times following a set of rules based on the prospect's interactions with content, form fills, website behavior, etc. Monitoring this behavior not only tells you how serious of a buyer they are but also which of your features or services they're most interested in.

Comparing Lead Nurture Tactics

Nurtures seem very similar to other types of marketing campaigns, but there are subtle differences:

- An **email blast** is a single email that goes out to a select group of people and is not based on any previous prospect behavior. There are no follow-up triggers scheduled based on interactions with the email.
- A **trigger** is automatically sent based on a prospect action and a set of rules you pre-assign. Trigger emails are not time-based and are an excellent tool for follow-ups to previous engagements.
- An **email drip campaign** is similar to a blast, except email drip marketing involves more than one email. Marketers develop and schedule a set of emails to move readers further down the funnel with each touch. Unlike nurtures, where prospects may receive the campaign at different times, each person in the drip campaign will receive the same series of emails simultaneously, regardless of interaction.
- A **nurture campaign** is a more complex series of emails. As with blasts and drips, the first email is sent to a selected group of people. The following emails depend on engagement, lack of engagement, or engagement type. In this way, nurtures are the most complex email campaigns and the best tool for enabling sales to focus on the right prospects at the right time.

Nurture campaigns also allow you to branch and change your course of communication based on the contact's actions. For example, if your call to action (CTA) in an email is to sign up for a demo and the prospect clicks the link to sign up, you may immediately alert the sales rep for direct follow-up and stop further communication through the campaign. If the prospect did not click, continue to offer content promoting thought leadership to gain the prospect's trust.

Why Should You Nurture Leads?

Lead nurturing ensures higher ROI on your content production and demand generation efforts. Not only does nurturing help warm leads and ease them into the funnel, but it builds relationships and better qualifies your leads.

- Educate prospects about your product or service.
- Build deeper relationships with prospects over time.
- Establish trust and credibility with your brand.
- Maintain top-of-mind awareness.
- Personalize content and experiences for each buyer.
- Preemptively overcome objections during the buying process.
- Close a higher percentage of leads.

Lead nurturing is especially beneficial for sales because it builds trust between reps and leads while also organizing content and touches at every stage in the sales funnel. It allows you to slowly build and develop relationships with customers from their first visit to your website to the day they sign on as a customer and beyond. Each lead gets the individual attention and nurturing they need to be a successful customer.

Get Started: How to Nurture Leads

Building a nurture track isn't as simple as flipping a switch. Prepare well by thinking through your campaign strategy.

1. Understand all the ways your company categorizes leads from marketing to sales and beyond.

From conception to close, what does the typical purchase process look like at your organization? What naming conventions do you apply to leads at each stage? Map out the entire lead lifecycle and identify where you need touchpoints.

2. Meet with sales to decide who should be communicating and when.

Should marketing communication stop at a certain point to handoff to sales? Should it start again if sales decides the lead isn't ready for sales engagement? Team up with sales, and have a conversation about the options and envision the ideal experience for your leads.

3. Map nurture programs to the lifecycle and identify triggers.

You'll likely need to nurture a fresh lead differently from a mature one, and a lost opportunity differently than a delayed one. Identify the start and end points for each message type, and find out how each change occurs in the system. For example, a warm lead moving from the marketing automation platform to the CRM might undergo a status change, indicating it is sales-ready. If you integrated your marketing automation platform with your CRM, you'll automatically listen for that change and trigger an action like removing them from the nurture.

4. Plan your nurture programs.

Before you build anything out, create a spreadsheet for each nurture program indicating the type of content and messaging, time between emails, and scoring potential, if applicable. This will help you identify content gaps, prioritize execution, and serve as a reference for each build.

5. Build your nurtures and test triggers.

Use your spreadsheets as a guide for building out each nurture program. Set up your field change listeners and work with your CRM admin to check back-end workflows that might impact your lead flow between systems. Create a fake record to test all the triggers, field changes, and flows.

> Sugar Market's nurture dashboard lets you see which nurtures perform the best, your top lead sources for nurture entry, and the number of sales-qualified lead conversions from each nurture. Over time, you'll be able to see how successful your programs are and adjust as needed.

Types of Nurture Campaigns

Here are six common nurture campaigns to help you get started. These nurtures force you to think through your audiences and practice creating audience lists in your marketing automation platform.

1 Welcome Nurture

When they first fill out a form, sign up for your newsletter, or engage with a social media post, your prospects might not know anything about your brand or solutions. A welcome campaign provides the new audience member with some high-level information about your company (not deep product or service details). It is used to start a lasting conversation with newly acquired leads.

2 Keep in Touch Nurture

If a prospect isn't ready to buy right now, you don't want to lose touch with them completely. This type of nurture campaign allows you to stay top-of-mind for the prospect while building credibility until they're ready to make a decision. In turn, prospects are warmer and more educated about your industry and products before they reach sales.

3

Reengage or Remarket Nurture

Sometimes, things don't go as planned the first time around. After some time has passed, automated closed-lost nurtures can give you a chance to reengage and revive the opportunity by reminding the prospect you're still available whenever they want to have a conversation.

Consider remarketing to leads that didn't initially convert but have continued to engage with your company and content. Communicate early and often with sales about why the lead is being remarketed, and what messages have already been shared with the lead. An effective remarket lead nurture program requires an integrated, bidirectional approach to passing leads back and forth between sales and marketing.

You may also reconsider:

- **Email sender.** A general email address (e.g., marketing@company.com) may be appropriate for first-time touches like newsletters, but sending from the sales development rep (SDR) may make more sense in a remarketed touch. This provides the benefit of continuing the familiarity of the SDR's name and the ability for the lead to reply directly back to them.
- **Send frequency.** Should you touch leads more often in the early stages of remarketing? Or reserve an increased cadence for a few months later? Remember, the lead may need a little time to become (re)interested or available again.
- **A/B testing.** Remarketing nurtures are a great environment to isolate and test variables like time of the day you send, day of the week, varying subject lines, or HTML versus text-based content.

4

Accelerate Nurture

Perhaps things aren't moving along as quickly as you'd like. Accelerator campaigns can nudge leads in the buyer's journey faster by providing relevant information that drives a purchase. Remember not to go overboard and scare prospects away with language that sounds overly committal.

5

Customer Nurture

Don't go dark on communication the second an opportunity becomes a customer. Customer nurture campaigns can introduce them to your company; help them onboard; give them early access to new products, features, and thought leadership; and allow them to take advantage of other offerings and contract renewals.

In addition to using nurture campaigns during the sales cycle, you can also use them to drive event and webinar communications, free trial and renewal programs, and customer onboarding and training programs.

A Nurture In Practice

A campaign promoting an upcoming webinar is a great way to test out your first nurture. Before the webinar, you can send messages promoting the event to encourage registration. Once the contact signs up, you can send automated messages thanking them for registering, and closer to the event, send reminders to attend. After the webinar, use a nurture track to thank people for attending or send a link to the recorded webinar for those that didn't attend.
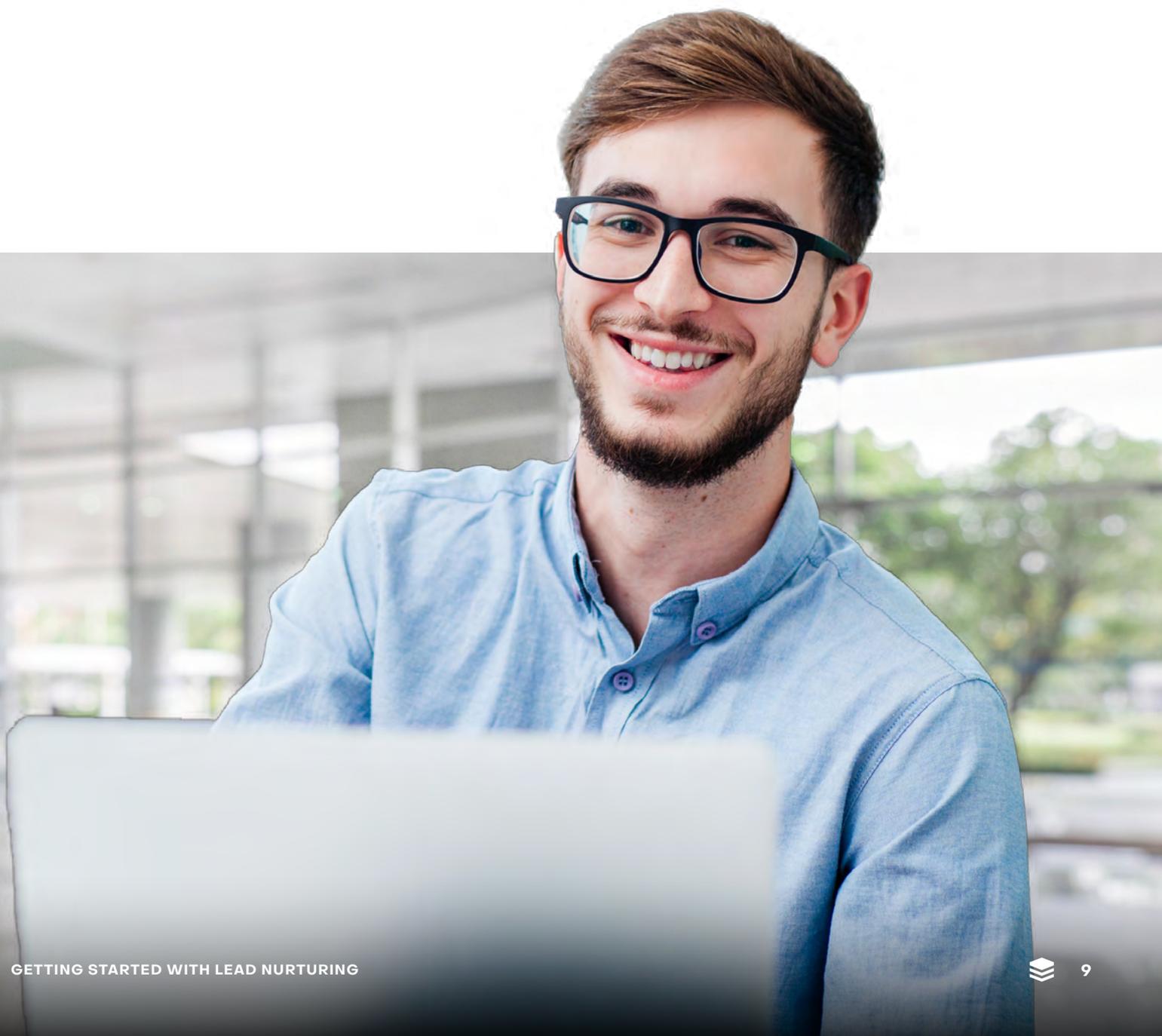
Time Your Nurture

Timing is everything. You can schedule your emails at a time when they'll resonate most with the audience. But it's also difficult to establish a cadence that works for you without bombarding the prospect (forcing them to opt out). Consider these key time frames in every nurture:

1. Program Entry

When building out a program triggered by a lead score change, value change in the contact record, or a form completion, you must establish the right timing of the first email and the cadence of communications that follow. Should your first email come immediately following a form fill, no matter the time of day? Or during work hours only for higher engagement?

2. Email Frequency

In general, it's best to limit email frequency to no more than one or two per week. Otherwise, you may overwhelm and force the lead to lose interest quickly. Run tests and determine what works best for your market based on your open and click-through rates.

3. Routing to Sales

A good nurture program can trigger alerts, tasks, and even opportunities in your sales system (CRM). Figuring out the right time to trigger an alert and get sales engaged with a prospect "in-program" is key. If it's too soon, you may turn the prospect off. If it's too late, they may already be on to a competitor. Again, testing short programs will give you hard evidence of what works best, but three marketing touches before engaging sales is a good rule of thumb.

4. Program Duration

The duration of your nurture depends on the length of the buying cycle. It's considered best practice to make a nurture program last 1/3 the length of your sales cycle.

Nailing the frequency and duration of a nurture campaign is tricky. You may still be asking yourself questions like:

"How much of a delay should I have between emails?"

Plan your messaging calendars with an even balance of emails and pauses, adopting a cadence that makes the most sense for your audience, planned content, and sales cycle.

Audience

Emailing too often can result in readers not reading, marking your messages as spam, or (worse) unsubscribing altogether. Be cautious not to overload the audience by carefully analyzing open and click-through data from past campaigns. If you're setting up a new campaign, look to web browsing data to inform your decisions based on industry or role preferences.

Content

It's tempting, but don't use up all of your most valuable content in one sitting. Spread it out over time to ensure higher engagement that lasts the whole cycle. Or, if you have shorter and easier content to digest, consider sending it more frequently or peppering it in between sends containing larger pieces.

Sales Cycle

Understanding your sales cycle is key to knowing when to send nurture emails. Companies with a relatively short sales cycle (e.g., one month) may want to stay top-of-mind for prospects as often as possible. But those with longer sales cycles may not want to overwhelm their prospects with too much information too quickly while they make a decision.

"How many emails should I send?"

There isn't a magic number of emails that make a perfect nurture campaign. Some experts will say "you shouldn't email more than once per week" or "there should be a minimum of six days between each send"—but these are just guidelines. The important thing is to understand what works for your company. Again, take into account your sales cycle and plan accordingly. If your typical sales cycle is one month, your nurture campaign may only be four emails, but if it's six months, that may be as few as six emails or as many as 24.

The type of customer you have in your audience also impacts the number of emails you should include. For instance, executives have limited time, so if you're over-emailing them, they may unsubscribe to "declutter" their inbox. On the other hand, a product manager may have more bandwidth to read your emails and need more information to decide. This is why knowing your audience and the personas you speak to is crucial.

"Should I blacklist specific days of the week and holidays?

Email marketing best practices suggest specific times and days of the week to send emails to your mailing lists for optimum performance. In addition, you may have "lights on" messages that supersede nurture emails, including those for existing customers, product announcements, or other important news. Determine if any of these emails will ever cross over and if the audience will influence what days you need to send your nurture campaigns.

Additionally, if you're in a vertical where you have a significant push around specific holidays, consider pausing your traditional nurtures for an intermediary nurture placeholder until you resume the normal schedule. Depending on your market, it may make sense to pause your nurtures completely during common times that people take holidays. Otherwise, you not only forfeit open rates, but engagement and gained knowledge among your audience.
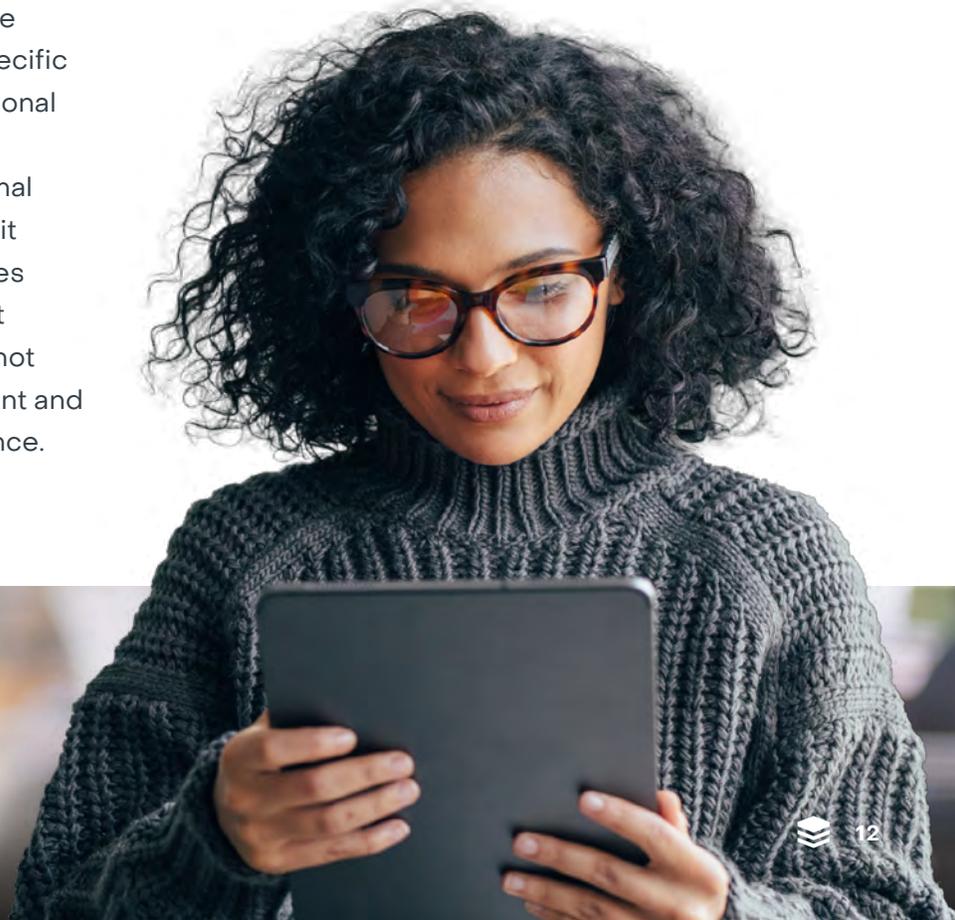
Best Practices for Lead Nurturing Campaigns

Pick an Audience...

Every nurture campaign you execute should target a strategic audience—but how you segment those audiences is up to you. For best results, segment in a way that is logically related to your brand, whether by persona (e.g., buyer vs. influencer), behavior/interaction (e.g., event vs. web lead), or product interest (e.g., CRM vs. consulting services) to name a few.

Audience segmentation is key to creating effective nurtures, as different audiences will prefer and require different types of content to convert from prospect to qualified lead. In addition, segmenting is especially important when building multiple nurtures to prevent users from falling into different campaigns at once.

Pro Tip

Don't let prospects fall into multiple nurtures at once. However, when they finish one nurture cadence, it's acceptable (and even advantageous) to direct them to another. This has the added benefit of showing you what works and what doesn't in your nurture campaigns.

...Then Organize It

Segment your audience by:

- **Region.** If you're targeting a specific country or geographical area, localize your content using the appropriate language, tone (to fit cultural norms), and relevant links they can properly access.
- **Product.** Nurtures are a huge win for companies with multiple products or services. Create a different nurture track for prospects based on their interest in a particular product or service. If they express multiple interests, add them to the most popular one first (based on your overall customer ratings) and follow up later with a campaign on the second product/service.
- **Industry.** If your company performs well in specific industries, speak to the typical challenges the sector faces. Doing this not only increases content relevancy but positions your business as an expert voice.

Pro Tip

Don't have enough content to satisfy an entire lead nurture campaign? Consider quicker content creation options like landing pages, infographics, or repurposed pieces. You can always replace them later with a fully built guide, whitepaper, or eBook.

Five Facts About Lead Nurturing to Keep You Motivated

- Only 29% of brands nurture their existing customers beyond the initial purchase. (Demand Gen)
- Companies that excel at lead-nurturing generate 50% more sales-ready leads at a 33% lower cost. (Invesp)
- Nurtured leads make 47% larger purchases than non-nurtured leads. (Invesp)
- 93% of B2B buying processes start with an online search. (Pinpoint Market Research and Anderson Jones PR)
- 51% of email marketers say email list segmentation is the most effective way to personalize lead nurturing. (Ascend2)

Advanced Best Practices for Lead Nurturing

Here are some ways to optimize and upscale future nurture campaigns to make them more targeted, personal, and effective.

Personalize Campaigns

99% of marketers say personalization helps advance customer relationships, with 78% claiming it has a "strong" or "extremely strong" impact. The best part is your marketing automation platform makes it easy to personalize emails at scale. If your nurture emails are already crafted around strategic audience segments, speaking to the audience's interests or challenges with personalized details encourages deeper and more immediate engagement. Remember to maintain a clean database, so contact information is always accurate.

While nurture marketing is often used for leads, you can also leverage it to provide meaningful experiences for customers and partners. Keep your brand top-of-mind with "awareness nurtures" that drive loyalty and create customers for life.

Analyze the Results

Your nurture campaign analytics hold the key to understanding your audiences' engagement. Use the data to actively monitor how your emails are performing and modify where needed. If the numbers aren't where you would like them, try changing one variable at a time, whether it's calls to action, sending cadence, or even the messaging itself. Allow your insights to build on each other. At the end of each campaign, take stock of the results and improve the next nurture.

Invest in Powerful Marketing Automation

By using a tool to automate your lead nurturing, you can monitor the progress of leads to keep the dialogue going. And with native CRM or the ability to integrate, you can keep sales involved in the process.

Get Creative

Try something new and see how it performs:

- Create ultra-targeted audiences using analytics.
- Bolster nurtures with added support and similar messaging through social media, retargeting, direct mail, sales outreach, and account-based marketing tactics.
- Try sending brand- and lifestyle-focused content that shares a peek into your company's team and culture.

Map Your Content

If email nurturing is an engine, then content is the fuel that keeps it running. Powerful and helpful content will build your brand's rapport with prospects, but poor content will do just the opposite.

Before building new nurture campaigns, start by mapping out your content and assigning each piece to a particular phase or message. Doing this ahead of time avoids scrambling for assets at the last minute or including a piece of content that doesn't make sense for the nurture stage. For example, choose overview guides and introductory pieces for early or top of funnel messages, reserving niche pieces and blog posts for later touches.
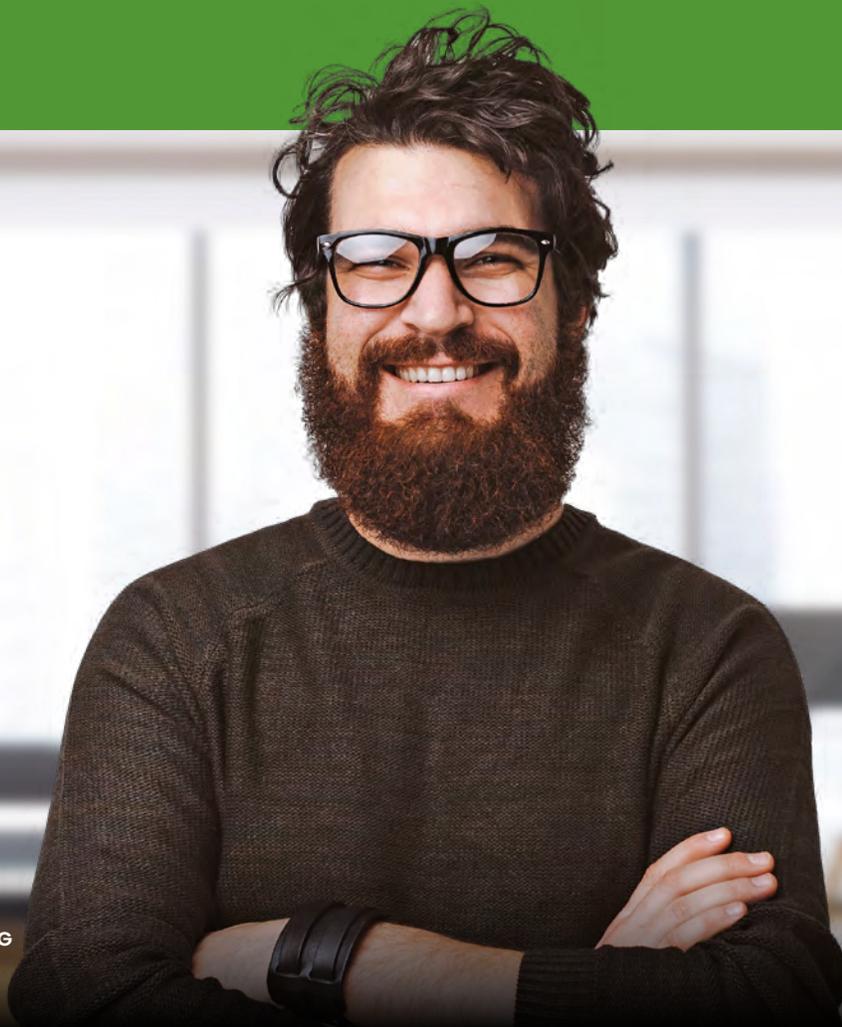
Nurture Content Examples

You may be familiar with the different formats of content you can produce (e.g., blogs, whitepapers, social media posts, etc.), but it's equally important to understand the purpose and intent of each piece you create.

Engaging and Informative Content

This content is more general in use. These include blogs, quizzes, or infographics—anything ungated that can appeal to your audience. This content fits wonderfully at the top of a nurture to help a prospect increase their lead score and provide them with something of value, free of charge.

Thought Leadership Content

Thought leadership is content authored and originated by a subject matter expert within your company. It may have been syndicated externally to your organization, but, as the name implies, it is unique, thought-inspiring content that's especially relevant to your industry. This may include whitepapers, eBooks, guides, research reports, or articles and is most useful in the middle of your nurture campaign.

Brand-Building Content

This content is meant to justify and identify your brand, making it well-positioned for the middle or end of a nurture campaign. Brand-building assets typically include case studies, testimonials, videos, and corporate landing pages. By letting brand advocates do the talking for you, this content encourages readers to move toward a decision without sounding too self-serving. While the focus may be on another company's use case, it's still important to make it relevant to the reader. Be sure to match industry or product-specific content to audiences with the same interests so the message resonates.

Offer-Oriented Content

This type of content extends a type of offer to your audience, such as a demo, free trial, coupon, discount code, or upgrade. This may include promotional emails, quiz results, or social posts. Offer-related content offers a "carrot" to your audience before passing them to sales but may not make sense for every organization.

Funnel-Based Lead Nurture

Not all stages of the sales funnel are created equal. Consider these tips for each stage:

- **Top.** At this stage, buyers are getting a feel for your company and your product. They might still be comparing you to other industry vendors based on price, branding, content, and current customers. Make sure you're providing them with a variety of general, educational content like blogs and infographics. Save product-specific content until at least the third or fourth touchpoint.

- **Middle.** In the middle of the funnel, buyers are no longer engaging with your content based on pure curiosity but with the intent to buy. They may be more interested in learning about your company specifically (history, employees, culture, and research) rather than your industry. These buyers should receive webinar and event invitations, emails to download high-value assets, and access to industry research.

- **Bottom.** At this stage, buyers are prepping for purchase. Ensure they're in touch with a sales rep to handle one-on-one interactions like demos, order forms, and contracts. When they're not corresponding with sales, the content they consume should reinforce positive sentiment about their decisions, further educate them about product features, and ease them into their customer role.

Maintain Your Lead Scoring

Nurture campaigns are designed to build a relationship with prospects before sending them over to sales. While any interaction from a prospect in your nurture is exciting, take the time to perform due diligence to ensure the lead is fully qualified before sending it over to the sales team. A premature sales pitch will only alienate a prospect, risking final conversion.

At first, you may score and qualify leads by simple actions like filling out online forms. But as you build brand trust and loyalty, your content and lead generation efforts will grow with you, hopefully resulting in more interactions and engagement. This means you must adjust score weights for initial actions versus those that require more engagement. Be sure to regularly revisit your scoring models to ensure appropriate scoring and higher quality leads.

Predictive lead scoring does the work for you, accurately predicting your leads' likelihood to convert to a marketing qualified lead (MQL). This takes the guesswork out of lead scoring and flags prospects to prioritize.

Communication is Key to a Healthy Relationship

Strong communication is essential to passing qualified leads to sales and getting the most value out of them. Whether you updated the scoring model, launched a new nurture campaign, or just have a helpful anecdote about the prospect, let your sales team know so they're well-prepared and more successful when it comes time to interact with the lead.

In the same way, interdepartmental communication allows sales to provide feedback on the effectiveness of your lead nurturing campaigns and lead scoring, allowing you to improve. You'll also want to work with your sales team to understand where it makes the most sense for marketing to stop nurturing leads and pass them on. See what kinds of insights you can gain from each other. This stronger communication can (and should) unlock new opportunities for both teams to win additional business.

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ABOUT SUGAR MARKET

Target accounts based on likeliness to convert, and personalize each outreach with Sugar Market. Highly intuitive campaign builders, AI-based predictions, and superior reporting enable you to understand engagement, improve conversion, and drive more revenue. With Market, you can let the platform do the work.

www.sugarcrm.com/solutions/sugar-market

About SugarCRM

SugarCRM is how marketing, sales, and service teams finally get a clear picture of each customer to help businesses reach new levels of performance and predictability. Sugar is the CRM platform that makes the hard things easier.

Thousands of companies in over 120 countries rely on Sugar to achieve high-definition CX by letting the platform do the work. Headquartered in Silicon Valley, Sugar is backed by Accel-KKR.

To learn more visit www.sugarcrm.com or follow **@SugarCRM**.

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