Chapter 6

LEAD NURTURING: THE PAYOFF FOR PATIENT MARKETERS

I hope I'm not shocking you with this revelation about the sales and marketing process, but, despite even your team's very best efforts, most of your leads aren't necessarily going to proceed in an orderly fashion from inquiry through to qualification on to being accepted and then into the closed/won status. No duh, right? It's just a fact we all live with. However, if you apply the principles I'm sharing, the net impact can be a dramatic increase in the percentage of conversions. That means more customers and more revenue.

There's one more key practice to share to improve conversions, and it's equally—if not more—important than lead scoring. It's *lead nurturing*.

So what creates the momentum for a lead to move along its journey through the Demand Funnel? At a high level, the prospect's willingness to proceed through the buying process will either come from his own initiative to move through each stage, or it will come from you proactively maintaining a conversation with him. No doubt, the sales team will guide prospects through the latter stages of the funnel, but at the top, where the funnel is widest and where sales is typically not yet engaged, lead nurturing is a vital part of creating and maintaining that momentum.

So, what, exactly, *is* lead nurturing? Here's an expanded definition: It's the automated process of engaging in a two-way dialogue with prospects to provide and obtain the information each party needs at key stages of the buying cycle. The ultimate goal of lead nurturing is to help prospects understand that your product or service is the best choice to achieve their objectives. Let's look more deeply at the key points of this definition.

- **Engage in a dialogue with prospects**—Just sending a lot of emails to prospects to stay top-of-mind does not constitute true *engagement*. When we talk about engagement, we mean *two-way* communication that respects the prospect's time, interests, and preferences. Engagement means not only what you communicate *to them*, but also listening carefully to *what they communicate to you* through their digital body language. Be sure to take into account the feedback you receive from prospects, both explicit and implicit, and adapt your communications accordingly.

Engagement means *dialogue*, not *monologue*. It means creating communication that has value for *both* parties, so that buyer and seller both have an interest in continuing to communicate.

- **Gauge each stage of the buying process**—Unless your product is an impulse purchase, your prospect goes through a multistage process before making a purchase decision. Remember, the prospect's *buying* process is not the same as your *selling* process! Typically, the buying process looks like this:

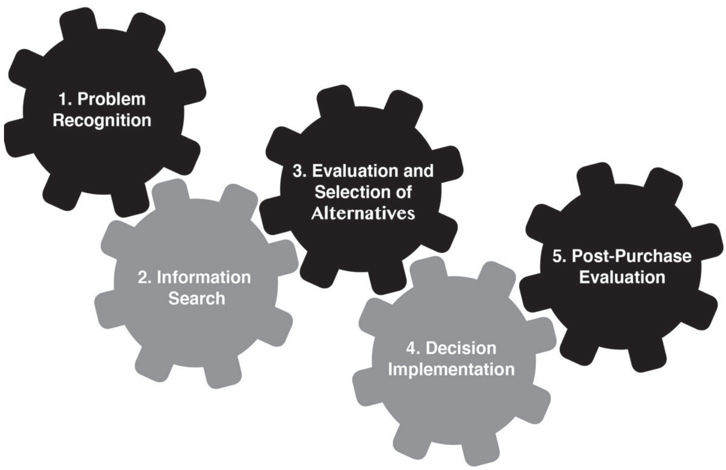


Figure 6.1 The Five Key Stages of the B2B Buying Process

A good starting point for your lead nurturing programs is to clearly identify the points within the buying process where prospects can be helped by receiving useful information from you. Step 2 in the above diagram might seem obvious, but, in reality, your prospects can probably benefit from ***relevant*** information before and after **every** stage of the buying process—including the first and last stages.

The key word is ***relevant.*** For your particular product or service, it's important to define exactly what kind of information is relevant at each stage (we'll discuss that issue later).

Of course, it can get complicated quickly, because most companies have more than one product and more than one kind of customer. And, for most companies, these stages aren't clean little boxes: They are multistep mini-processes in themselves. So it's important to take appropriate time to sketch out the buying processes for the specific buyer personas and identify specific product/service resources that align with those needs.

- **Help prospects achieve their objectives—**Why do prospects become customers? Ultimately, it's because they feel and decide your solution will help them achieve their objectives. They believe that yours is the best choice, for various reason(s), to solve their problem.

In terms of content strategy for nurtures, the key point is that lead nurturing needs to be about *the buyer*—**not** about *you*. Too often, we see lead-nurture programs that are completely focused on product features—the "what" and "how"—and not on the benefits—the "why"—which are far more important. Of course features are important, but nurturing is as much about igniting feelings as about sharing facts. It's rooted in biology that decisions, particularly "yes" buying decisions, are largely based on emotions. A one-to-one dialogue that starts with "why" ensures the prospect will connect with you faster. Starting with "how" forces the prospect to tally up a bunch of features to figure out what to do and determine if you're the best choice. By starting with "why," you create an emotional connection with the prospect first and that connection will later foster greater interest in learning about the "what" and "how."

Here's what I mean. Which of the following two approaches is a more powerful introduction to a conversation?

We believe that managing your diabetes should be painless and easier. We want to help you to live a long, healthy life without the hassles of testing your blood sugars manually. So, we created Dialife for you. It's an automated way to monitor your blood sugars 24 hours a day without ever pricking your finger. Want to see how?

– OR –

Get Dialife. It's a continuous glucose monitor that you place on your arm that uses laser beams to check your blood sugar level instead of traditional blood testing. It's about the size of your thumb and is covered by most insurance companies. Watch this demo to learn more.

The Five Goals of Lead Nurturing

- Accelerate the sales process by moving prospects through a structured buying cycle.
- Keep your company/solution top-of-mind.
- Reveal your benefits in serialized sound-bites.
- Capture qualification profiles.
- Measure and increase the prospect's interest.

IT'S A PROCESS

In fleshing out our definition some more, perhaps we've glossed over an important point. The first portion of the lead-nurturing definition is perhaps the most important: "*automated process.*" Lead nurturing is an ongoing, continual process that's driven by systems, schedules, and programmed guidelines. It's not a one-shot deal. The structure of every nurture framework is unique. Good nurtures are the opposite of batch-and-blast marketing. They are carefully constructed with a variety of facets to gently but firmly drive prospects to very clearly defined goals. In many organizations, the proper practice is to establish *multiple* types of nurture programs that pursue different objectives:

- **Seed Nurturing**—These nurtures are aimed at contacts "above the funnel" (sometimes called "suspects"). Here, we are targeting new contacts by acquiring names, lists, and opt-in email addresses and creating multi-touch campaigns to encourage/persuade these new people to engage with us. This multi-touch concept is distinctly different than the old-school "one-and-done" approach, where we simply built the *campaign du jour* and tried to get responses through "another random act of marketing." Experience tells us that a single exposure is usually insufficient to build the level of awareness required to generate a response. Instead, our strategy is to build a *series of touches* that work in concert to build brand recognition, deliver content the suspect cares about, and increase awareness among the total available market. The old adage "There's no silver bullet" is still relevant today. Instead, we want to build a series of one or two touches a month targeted to our suspects (a so-called "drip-nurture"). A bad response or no response typically only means "not now." However, be careful not to overdo it with too-frequent emails. Over-communicating can make you come across like a stalker. Nobody wants to feel forced into a relationship. Your goal is to provide valuable content and resources, not make them cringe at the sight of another email from you. Think, "Can I offer you a drink?" instead of "Can I take you home?"

- **Inquiry Nurturing**—An inquiry nurture continues the conversation with someone who has responded to a seed nurture. The prospect enters the funnel as an *Inquiry* and begins to receive communications focused on educating this new prospect to increase their interest. Done right, this top-of-funnel nurture further qualifies the prospect before an introduction is made to a lead development rep or sales rep.
- **Marketing Qualified Lead (MQL) Nurturing**—In the MQL lead nurture, the goal now is to see if the qualified lead will engage with a rep. Since an MQL is showing substantial interest based on the scoring system, the prospect is likely at a later stage in the buying process and might be ready to discuss their needs and your solution in more depth. This nurture can have a huge impact on movement down that funnel because it "automagically" tries to engage with the MQL instead of waiting for sales to reach out when they get around to it. Although it's automated, an effective technique is to have the drip emails appear to come directly from the assigned rep to the MQL. This assignment is typically made using the CRM's lead assignment rules, and since the two systems are integrated, we can have the emails dynamically come from the assigned sales or lead development rep. The calls to action for these one-to-one emails might be to set up an introductory phone call, schedule a short demo, provide a free consultation, or offer a free trial (among other common tactics). Assuming you have lead scoring in place, the MQL nurtures are only initiated with qualified leads that have demonstrated they fit the qualification criteria and have shown a medium-to-high level of interest. (see Chap. 5).

Certainly, you could build nurtures for other stages of the funnel, but the inquiry and MQL stages are great places to start. Before we move on, I want to suggest that, after you get the default inquiry and MQL nurtures in place, consider building custom nurture tracks *within* each one that target your individual personas. For example, if your MQL nurture commonly has two or three different personas (based on industry, role, or company size), you might develop a separate track for each of them that contains content designed to help that persona move further through the funnel.

Customized persona-based nurture tracks for prospects at each funnel stage enable you to better address your prospect's concerns and requirements, instead of just falling back on the default track and standard message. An automated message coming from the rep that reads, "If you're concerned about the security of your patient data..." will be more effective to a healthcare prospect than a generic one like, "Data security is a key issue in companies similar to yours…." Start with a basic nurture and then build custom tracks within it once the nurture is up and running and your personas are well-defined in the system. Now, let's look at how you can nurture when contacts fall outside the funnel.

- **Recycle Nurturing—**Suppose that, after sales receives the MQL, the rep attempts to reach the prospect several times by email and possibly phone over a few weeks. What happens then? Although 90 percent of leads don't convert into closed/won business, that doesn't mean they have no future value. They still need to "go somewhere" in our funnel. So, if he fails to make contact, the rep should designate the lead for *recycling* in the CRM, selecting one of several predefined reasons (e.g. bad timing, lack of budget, competitive losses.) A recycling nurture lets the prospect "snooze" for some period of time, and then gives marketing the opportunity to try again for a response by providing information targeted to the recycling reason. For example "bad timing" might indicate the need for a longer/slower nurture or content about why the time is right for your solution. For "lack of budget" you could offer an ROI calculator and customer case studies on how your solution has been cost-effective. (You can see a video on how this works on the manufacturingdemand.com website.)

- **Tactical Nurturing—**Sometimes, we nurture for a specific, tactical reason.For example, if you offer a free trial, such a campaign might benefit from a well-defined, thoughtful nurture program to encourage the prospect to download and install the product and give feedback. You can nudge them along during their trial period with screenshots or video walkthroughs showing what they can do with the product and how they will benefit from it. Toward the end of the trial period, your emails can include a "countdown clock" to create a sense of urgency. Other examples of tactical nurtures include automated subscription renewals or event nurturing to handle the series of invitations and reminders.
- **Onboarding Nurturing—**You did it. You have a new customer. This is a great time to build upon the relationship with a post-purchase nurture, welcoming your new customer and show the valuable resources available. Many B-to-C marketers really shine here, while I've found that B-to-B companies often overlook this key opportunity to build rapport with new customers around training, support, and feedback.

- **Customer Lifecycle Nurturing**—If your company sells more than one product or service, it's essential to maintain the conversation throughout the customer lifecycle. This also lets you execute vital upsell/cross-sell campaigns.

THE BASIC RECIPE FOR A LEAD NURTURE

The best analogy for a well-designed lead nurture is that it's a *conversation* between you and your prospect. And remember: A conversation is a two-way street. So, what's the best way to initiate, structure, and sustain a lead nurturing program? After working on hundreds of these programs, I find there's a basic "recipe" that almost any enterprise can implement to succeed and it involves the following elements:

- **A defined objective—**What do you want the prospect to do or to know by the time your nurture ends? Establish very specific, measurable objectives for every nurture. Otherwise, how can you determine how well it did? If you can't define a specific, measurable objective, you won't be able to determine if the nurture is working. An example of a vague objective is "Increase awareness of our company/product." A better objective is "Convert 5 percent of free trial users into paid subscribers." Another measurable objective might be to move 8 percent of inquiries to MQL status. Segmentation techniques help you determine how many of the people who entered the nurture achieved the desired goal and, therefore, how effective the nurture was.
- **Entry Criteria—**Here, we have a lot of specific questions that we should address to aid in the design phase. How will contacts feed into the program—by contact group, filter, status, or form submission? Can a contact enter the program more than once? Are there differences between

the initial feed of contacts and any subsequent or ongoing feeds? What are the specific field requirements for identifying personas? What contacts should be excluded from the program, and how should they be handled? Are there different exit paths for different exclusions?

- **Exit Criteria—**We don't want a "Hotel California" nurture program ("You can check out any time you like, but you can never leave"). So we need to decide under what conditions contacts should be removed from the program. Is it when they complete the program or when they achieve the goal? What other use cases should cause an exit? For example, how will you handle unsubscribe requests, hard-bounces, successful registrations, or changes to record type in the CRM system? The trick is to build a list of the conditions that would remove people from the nurture.
- **Touchpoints/Key Messages—**Do you envision only one track for contacts entering the program, or will you need different tracks for unique personas? If there are multiple tracks, how will the content and timings differ? How many touchpoints will there be for each track? What is the key message and call to action for each touchpoint? For nurtures that use more than email, what additional types of touches will occur—such as SMS text message, call-on-demand, direct mail piece, or even social media posts.
- **Frequency/Timing—**Is there a waiting period at the beginning of the program before any evaluations are performed or emails are sent? What about at the end of the program? What is the waiting period between touchpoints/emails? Are there day/time restrictions to account for business hours and locations? Are there conditions where someone should skip a touchpoint?

- **Assets Required—**This is a crucial component of any type of nurture program: the content. Are landing pages or fulfillment material (such as white papers or case studies) needed? Do those materials already exist? How many emails must be created, and what type of template will you use? If these assets don't exist, who is responsible for creating them? If these assets will be gated by forms, don't forget to define the requirements for the forms, such as campaign ID, fields used, pre-population, or progressive profiling. If the assets will be housed on new landing pages, be sure to establish responsibility for creating those pages.
- **Reporting Requirements—**How will you measure the success of the nurture? If a an objective was well-defined, be sure you know upfront how you will measure it. You want specific, defined metrics in order to track results and identify the reports you want to see and how often.
- **Post-Nurture Plan—**Think about what happens to prospects after they exit the nurture. Have a plan for them, such as flowing them into another nurture. Remember, you may have more than one post-nurture outcome, depending on whether they exit in the middle or at the conclusion of the program.

NURTURING THROUGH THE FUNNEL

Remember that, when considering a product or service, buyers go through a multistage buying process that can be a fast cycle or a lengthy and complex process, depending on the product. During this process, the buyer looks for and needs different kinds of information to help with the decision.

A Nurture Project Brief

Before you initiate a nurture program, it can be very helpful to perform some preliminary analysis and strategy definition. I like to create a "Nurture Project Brief" that responds to the issues above and contains some or all of the following elements:

1. **Overview**—Articulate a summary of the initiative in general terms, including relevant contextual background information that is important to understanding the entire nurture project.
2. **Project Summary**—Summarize the project's steps and include a timeline.
3. **Nurture Objectives**—Define a specific set of measurable goals. What are the key performance metrics that will demonstrate the success of the nurture program?
4. **Tone and Personality**—What will be the voice, tone, and manner of the nurture communications and fulfillment/response materials?
5. **Marketing Assets Required**—What content will you need? List the assets required such as white papers, data sheets, demos, and more.
6. **Approvals**—Whose buy-in will you need to initiate and sustain the program?
7. **Define the Specifics**—Will this be single- or multi-track? How many touches will there be? What's the duration? What are the entry and exit criteria? Are there special exit paths or late-entry on-ramps? Next, dive down to the details of each touch: the template, content summary, landing page requirements, assets required, timing, and more.

At first, the buyer is typically interested in general information: How do I solve my problem? Then, he looks at different products or services to learn how they approach that problem.

Next, the focus narrows to products or services that seem best suited to the challenge. The buyer examines them more deeply, looking at details of implementation or usage, reviews, risks, price, and more.

Next, he makes the selection. He decides on one solution and goes through the purchase process.

Finally, he implements that solution, ensures it works properly, keeps it updated, and addresses any subsequent issues.

As you use nurturing to move a prospect through the demand funnel from inquiry to closed sale and beyond, you should have one goal in mind: to provide the specific, relevant information that your prospect needs at each stage. This is where you have to begin translating the buying stages into the stages of your demand funnel, so you can identify the right information to deliver at the right time.

Figure 6.2 shows five points where nurturing is particularly effective in delivering the right information to prospects and driving them through the funnel or back into it.

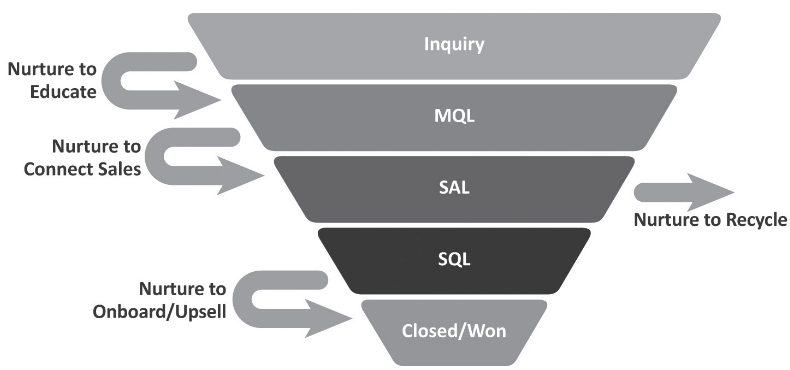


Figure 6.2: Key Places for Nurturing Programs

PHASE ONE: INQUIRY TO MQL: IT'S ALL ABOUT EDUCATION

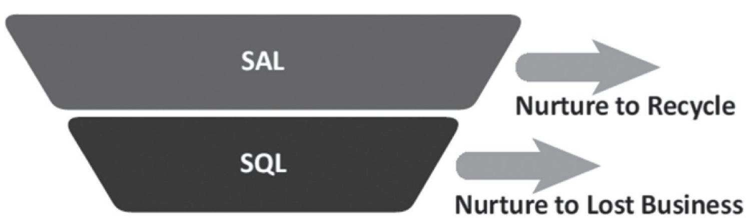
Moving the prospect through the inquiry stage to become a Marketing Qualified Lead (MQL) is actually a process of education. Make sure your nurtures are focused on educating the prospect about your solution, but with an emphasis on the prospect's needs. This is sometimes described as "welcome nurturing," but it should definitely be much more than that. This stage is your greatest opportunity to engage with your prospect and generate real, sustained interest in your offering. Educational/welcome nurtures are the right place to use your exciting multimedia content, webinars, and other similar resources as calls to action.

Depending on the nature of your business, you may need multiple nurtures to address the specific needs of different kinds of prospects. Within each of those nurtures, there may be numerous tracks or paths that your prospect may take, depending on his digital body language. For example, a software company likely has several different software products, and each of those may be used by different kinds of businesses with different types of challenges. The more specifically you address your prospect's needs, the better success you will have at moving the prospect on through the funnel.

PHASE TWO: MQL TO SAL: MAKE THE CONNECTION

The next step in the nurturing process is to move the lead from MQL to Sales Accepted (sales-ready) Lead (SAL) status. The primary goal is to connect the prospect with a lead development rep or salesperson. The best content assets and lures at this stage are tools like needs assessments, free consultations, and personal demonstrations—anything that results in communication between the prospect and a representative who can answer questions and help with engagement to take the relationship to the next level. People buy from people and companies they like, so engaging with contacts in one-on-one conversations moves the buying process along in most cases.

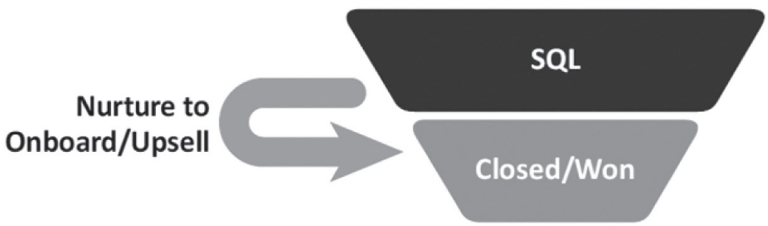
PHASE THREE: SAL AND SQL: RECYCLE



There's nothing left for marketing to do once the lead achieves SAL or Sales Qualified Lead (SQL) stages, right? Think again! We need a plan for leads that are accepted by sales, but turn out to be not yet ready. In many organizations, these leads simply fall through the cracks, and that's an unbelievable waste. After all, if they weren't MQLs, they wouldn't have gotten this far, so they still have long-term value. Send these leads into your recycle nurture program that gets them back through the Demand Funnel and reengaged with sales in the future. If you don't, a huge percentage of these contacts will buy from a competitor because you didn't stay engaged with them. They may not be ready to speak to a rep at the MQL stage, but, by recycling, marketing can stay engaged with the prospect while sales focuses on MQLs that *are* engaging.

What about lost business? Sales Qualified Leads are lost for a variety of reasons, and most of them don't mean that the lead won't have future value one way or another. Your company may have other solutions that could benefit the prospect. The prospect's chosen solution (from your competitor) might not work out. It's honestly very rare that an SQL should be disqualified in the database. A better approach is to put them into a win-back nurture that puts them in hibernation for a period and checks in to ask, "How are things going?"

PHASE FOUR: SQL TO CLOSED/WON: ONBOARDING, RETENTION, AND UPSELL



Woo-hoo, you've won the business! But don't relax: Your job's not done. As we all know, it's a lot more expensive to get a new customer than to keep an old one, so now it's up to you to keep building rapport and onboarding nurtures are a great way to achieve that.

Start with a "welcome aboard" nurture for net-new customers, followed by onboarding and training nurtures. If your solution is complex, or customers can use guidance on adoption, direct them to customer resources like your online community, resource center, or training videos. At the right time, upsell and cross-sell campaigns are clearly good choices for future nurture campaigns as well.

Continuing nurtures for loyalty and retention often include gentle reminders about ongoing training, invitations to events and webinars, user group communications, and industry news/trends. The goal is to keep your company top-of-mind throughout the customer lifecycle and help ensure customers get what they were promised in the buying cycle. We all enjoy the upscale hotels where the maid turns down the bed and delivers your nightly chocolate, the concierge calls after you check in to see if everything is OK, and the bellman demos all the hotel room options. Why not do your own "virtual version" of hotel-style customer service with your onboarding nurtures?

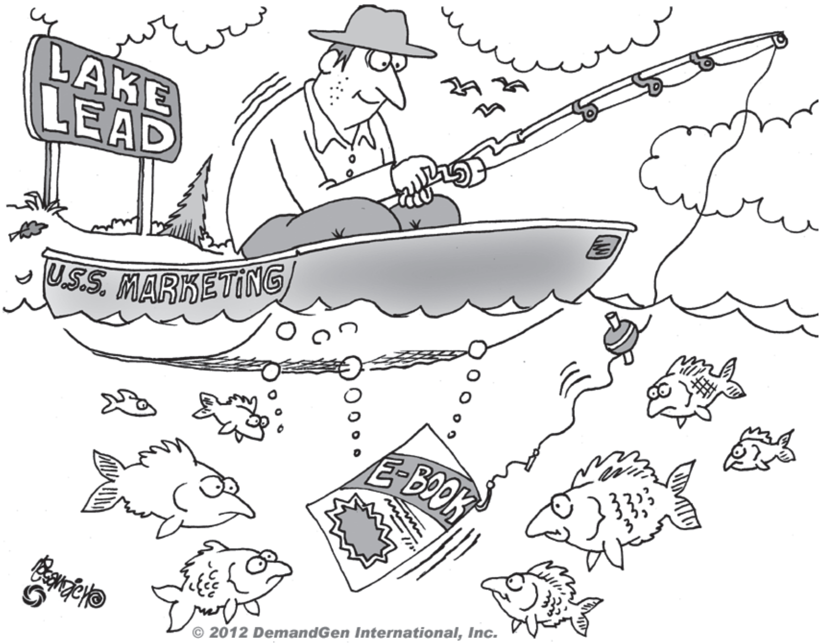
WHY LEAD NURTURING MATTERS: SIX REASONS

If you're like most marketers who understand the value and power of marketing automation, chances are you need no convincing that lead nurturing is a good idea. But you *are* likely to have colleagues and management who aren't as aware of the impact lead nurturing can have on the buying cycle and, ultimately, revenue. For those folks in your enterprise who need some convincing metrics to become believers, here are some helpful stats from a few of the most trusted benchmarking firms:

1. Companies that excel at lead nurturing generate 50 percent more sales-ready leads at 33 percent lower cost per lead (Forrester Research).
2. Nurtured leads produce a 20-percent increase in sales opportunities over non-nurtured leads (Demand Gen Report).
3. Sixty percent of marketers believe that technology can help them develop more high-quality leads (Forrester Research).
4. Sales reps dedicate 14 percent of their time to lead development, but only 6.3 percent of leads are utilized (Sirius Decisions).
5. Nearly 80 percent of marketing leads never convert into sales. Lack of lead nurturing is the common cause of this poor performance (MarketingSherpa).
6. Eighty-four percent of qualified leads are not ready to buy (Aberdeen Research).

The Key Tactics of Lead Nurturing

- Internalize the Demand Funnel.
- Decide which types of nurtures to build to support the funnel.
- Develop a nurture brief that includes clear objectives.
- Inventory your existing content.
- Map existing and future content to buying-cycle stages.
- Design the workflow processes using a diagramming or flowchart tool before you begin program development.
- Measure effectiveness of the nurtures and optimize for the desired results.

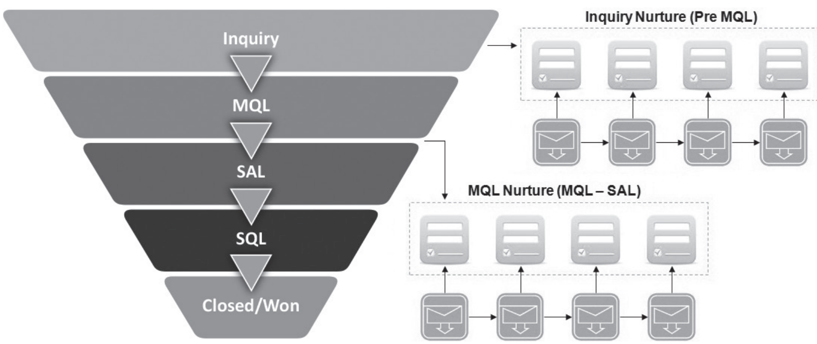


CONTENT: HAVING THE RIGHT BAIT

One of the principal tenets of Manufacturing Demand is that you need to speak in different ways to different buyers at different phases of the sales cycle. In fishing vernacular, you need lots of different lures and lots of different kinds of bait to catch lots of different fish. Your buyer personas will help you understand these delineations very well. Remember Gary (the broker) and Maria (the loan officer) from my ride-alongs with Joe at Ellie Mae? They have different pain points, different needs, and different motivations—so catching them is going to require different bait.

For instance, early in the buying cycle, a technology evaluator might want to sign up for an e-newsletter or download a white paper that helps educate him regarding the key characteristics of an emerging technology. Later in the cycle, he might register for a webinar or download a product demo. If a VP-titled site visitor downloads your ROI calculator, it's a signal that the company has moved further through the buying cycle. You want to ensure you have the right content for the right stakeholders at the right time to *help* them through the buying cycle.

Once you've structured your Demand Funnel and lead nurture programs, just what, exactly, are *you* going to say to your prospects as they wind their way through your Demand Funnel? A good way to start is to think about what types of content you have—and where each type fits in your funnel.



Traditional content-marketing strategy across industries used to involve marketers creating broad ranges of content, such as data sheets, white papers, and much more. That content was typically designed to tell prospects about the products and services you offer: what they do, why they are better than others, how to use them.

Yawn.

Today's sophisticated B2B buyers don't want that kind of content anymore (or at least not primarily). They're looking for helpful *educational* content that makes them more knowledgeable—and incidentally also makes them feel like your company is a respected thought leader in its sector. Robust, compelling content—that is more about the buyer and less about the seller—is what fills the funnel.

Demand generation today is a constant process of developing content to attract your target buyer. If you don't continually refresh your "bait locker," changing out your offerings and expanding your selection, the fish will lose interest and (to carry this metaphor to an extreme) things are not going to smell very good. Remember, there are a lot of other fisherman trolling the lake, so your bait needs to be the most appealing.

Content marketing strategy is a serious discipline involving the planning, creation, delivery, and management of informational content. A content strategy defines messaging, purpose, structure, workflow, and governance for content across the organization. A content strategist is analogous to a creative director: the former for content, the latter for design. Two points of content strategy are particularly relevant to marketing automation: frequency and relevance.

- **Frequency—**Content generation and dissemination must maintain momentum to be effective.
  - **Frequency of contact—**Strive for the balance point by delivering updates that are frequent enough to maintain interest, without becoming incessant and annoying.
  - **Frequency of content updates—**Keep things fresh by producing new materials often—and not forgetting to cull the pieces that are outdated and stale.
- **Relevance—**Marketing automation systems, data segmentation, and personas enable you to pinpoint your messaging to specific targets. Take advantage of that ability.

- **Relevance to buyer interest—**Messages should focus on the buyer's challenges, needs, concerns, and issues, as opposed to the solution being offered or broad generic topics.
- **Relevance to buying stage—**Materials and messages are designed to fit the buyer's current stage in the buying cycle.
- **Relevance to marketing requirements—**It can't be relevant if it's not there. Audit all your existing material and document it in a content inventory workbook or system. You'll find out where the balance is off and what gaps exist that need to be filled.

Top Tips for Content Curation

1. Perform a content audit and document the content inventory.
2. Develop key themes, taking into account buyer personas and product positioning.
3. Assess content resources, defining the who/what/where/when of content development.
4. Create content, calling on appropriate resources for research, development, review, and approval.
5. Publish content through appropriate means.
6. Track, maintain, and revise content regularly.

MANUFACTURING DEMAND IN ACTION

Ellie Mae, Inc.'s On-Board Nurture Program

Since 2003, Ellie Mae has redefined the market for software and services in the often-fragmented residential mortgage industry by bringing together mortgage bankers, credit unions, community banks, mortgage brokers, lenders, and service providers. Its acclaimed Encompass software delivers a comprehensive solution to support brokers and bankers throughout the loan process.

But Ellie Mae considers the sale of the software license to be the starting line—not the finish line. Crucial post-sale adoption processes—the "on-boarding" of the customer—must take place to ensure a successful long-term partnership with the customer. For many users, Encompass is more feature-rich than what they're used to. Although it's easy and intuitive to use, it can be intimidating at first. With tens of thousands of customer contacts and a small marketing team, the challenge was significant.

The solution? A comprehensive, highly structured on-boarding nurture program that helps users through their first three initial months with Encompass. This automated welcome program lets the company reach users right at the point when they've starting using the software and continue to stay in touch throughout their initial use of the software.

Ellie Mae created two on-board nurtures—one for system administrators that focuses on key configuration steps, and one for users that focuses on the resources and training new users might want to use Encompass to its fullest potential.

Through integration with its marketing automation system, Ellie Mae automatically adds users to the program in less than 24 hours after their first login. Already, the company has synched and segmented contact data for more than 30,000 users at the right time—just using a few mouse clicks and without burdening the company's IT staff. From there, it's a series of timed, orchestrated emails at different rates, depending on their role (admin or user). For instance, users see the following steps:

- **Start—**An overview of new-user recommendations.
- **Learn**—A review of different training options.
- **Ask**—How to get on-demand and one-to-one customer support.
- **Explore**—How different users can be more efficient in Encompass.
- **Health Check**—A check-in to see if users are on track.
- **Tell Us**—An opportunity to give feedback.

These emails drive recipients to the company's dedicated Client Resource Center where they can get more training, tips, tools, support, and more. By getting users engaged with Encompass and adopting more of its features, Ellie Mae is improving customer satisfaction and long-term loyalty. Users are more aware of on-demand service options as well as the availability of add-on purchase options. There are also fewer costly calls to the support center. The on-boarding has also led to a 60-percent increase in the rate that users return to key service pages. The bounce rate for those pages has also plummeted, indicating that users are spending quality time with these online resources.

STAGE	AWARENESS	EDUCATION	EVALUATION	JUSTIFICATION	PURCHASE	POST-PURCHASE
What prospect is doing	Beginning solution search	Has identified key solutions and is examining each	Evaluating solutions against needs	Assembling short list	Has made selection and is ready to buy	Using, updating, upgrading/expanding
What prospect is asking	• Who are the suppliers for my need? • What's the scope of potential? • Where do I stand? • How can I easily find out more?	• What do they offer? • Are their customers achieving success? • Do they fit my need? • How can I easily evaluate/demo?	• Do they meet my expectations? • What do analysts say? • Is the company viable? • How do they compare? • Why should I choose? • What's the cost?	• Is this a leading, solid product/company? • Does it meet or exceed my need? • Can I afford to buy and implement?	• How can I easily purchase? • Who can I call? • Why buy now? • Do they have a partner in my area?	• How do I get training for my people? • What resources and information are available? • How/why should I upgrade? • What other options/related solutions are there?
Best content types	• Industry white papers • Company product white papers • Customer stories • Assessment tests • Press releases	• Company white paper • Seminar/presentation • Product spec sheets • Customer stories • Recorded demo • Analyst reports • Educational tips	• Features/benefits • Free trials • Webinar/live demo • Competitive and cost comparisons • Company/product recognition/awards	• Product/customer reference site • ROI tools • Product awards • Customer stories • Press releases • Webinar/presentation • Live demo or sales call	• Direct sales • Partner locator • Promotions or deals • Service and support information	• Training and user information • Service and support information • Cross-sell/upsell • User community • Industry/thought leadership

KEY TAKEAWAYS

- Not every lead proceeds through the Demand Funnel at the planned pace. Lead nurturing guides these leads through the funnel by offering the right information to the right person at the right time.
- Nurture campaigns should be about the *buyer*, not the *seller*.
- The Five Goals of Lead Nurturing
  - Accelerate the sales process by moving prospects through a structured buying cycle.
  - Keep your company/solution top-of-mind.
  - Reveal your benefits in serialized sound-bites.
  - Capture qualification profiles.
  - Measure and increase the prospect's interest.
- Nurture campaigns include seed, inquiry, and MQL—each of which requires different content, timings, and tone.
- So-called "tactical" nurtures help with specific goals such as on-boarding.
- Recycle nurtures move leads back up the Demand Funnel for further nurturing because they are not ready to buy.
- Make sure you have defined objectives, entry criteria, and exit criteria for your nurtures. Define the key messages, timings, and content assets required—and have a post-nurture plan as well.
- Have the right "Content Bait"
  - Frequency
  - Relevance