



# How to Choose the Right Solution to Nurture Leads and Customers



## Marketers Assume More Power—and Responsibility

As a marketer, you no longer control the flow of information buyers seek about your products and services.

Instead, today's self-empowered buyers find the information they want online. After all, there's more than enough information at their fingertips on just about any topic. It's no wonder that by the time buyers are ready to talk to a sales rep, they've already completed 60–90% of the buying process.

This shift in buyer behavior puts the onus on you, the marketer, to influence buying decisions...and not just for the initial purchase, but for subsequent purchases and over the entire customer lifetime.

That's where nurturing comes into play. Lead nurturing has always been an important activity in the process of converting prospects to customers. But to succeed—and to engage today's buyer—marketers need to change how they think about and handle nurturing.

In today's world, you as a marketer must engage prospects and customers across many different channels, with more content, at exactly the right moment. But to do so, you are likely managing dozens of programs and content assets at any given time. And it's tough to figure out what a lead has or hasn't seen, and the next best content or message that person should see.



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## Engage, Don't Blast

In the end, your job as a marketer is to continually engage both prospects and existing customers to encourage purchases and loyalty.

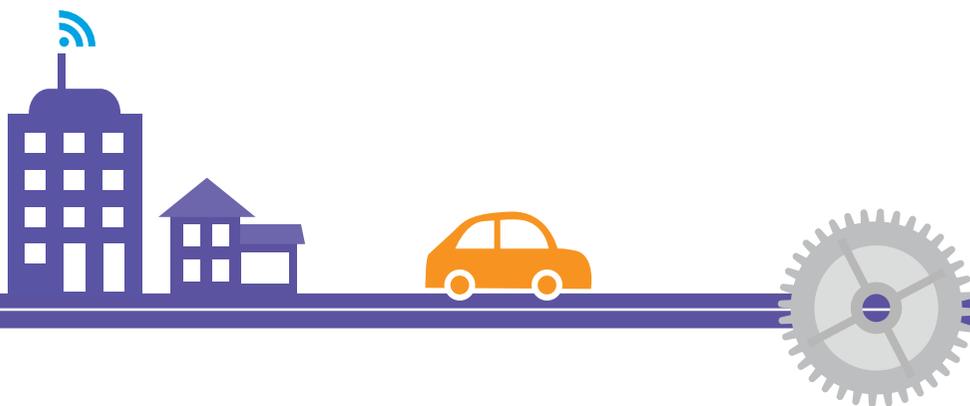
And that must take on a new approach, one that goes beyond a traditional batch-and-blast email strategy. Not only is this “noisy approach” highly ineffective, but by sending irrelevant messages today, you lessen the likelihood of connecting with potential buyers in the future. After all, nobody likes to get “blasted”, and someone who receives irrelevant communications is likely to tune you out. And if you send enough irrelevant messages over time, you'll hurt your email deliverability score and risk getting your company's domain blacklisted.

Instead you must focus on being found and attracting the attention of prospective buyers. The key is to engage prospects in a relationship that builds trust and paves the way for open dialogue. This eBook explains how to do just that.



**YOU'RE SENDING MESSAGES—  
BUT IS ANYONE LISTENING?**

Self-directed buyer's shields are up. They're tired of being bombarded by marketing messages and they're ignoring your mass communications.



# Four Keys to Engaging Through an Emotional Connection

Effective lead nurturing today depends on making sure your message gets absorbed as buyers are considering their options.

And that means you need to develop a direct relationship with each individual. You can do that through engagement marketing. Where batch-and-blast campaigns feel like shouting, engagement marketing feels more like a natural conversation. That's because engagement marketing attempts to genuinely connect prospects and customers with a company by "engaging" them in a dialogue, with the goal of eliciting a positive emotional connection. The more frequently and consistently you can connect with a prospective buyer on an emotional level, the stronger and more deeply that person becomes engaged with your brand.



## EMOTIONS SWAY PURCHASE DECISIONS

Behavioral psychologists have long claimed that only 30% of human decisions and behaviors are driven by logic and rational considerations. Extrapolate from that and you see that about 70% of buying decisions are based on emotions.



# Effective engagement marketing incorporates four key elements:

## 1. RELEVANCE

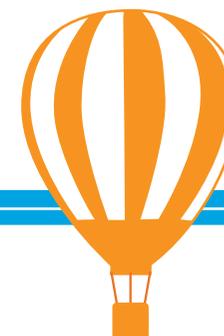
Relevance should always be of primary concern to a marketer. If communications or content are not relevant, they will be ignored. Plus, it can be detrimental to your lead nurturing efforts if you send the wrong information at the wrong time to a prospect. For instance, if you send a pricing sheet to a prospect that isn't even close to making a buying decision, you might cut short any future interactions. In other words, you would create distance between the buyer and your company, and lose the opportunity to convince that person of the value you deliver. You need to listen and understand what is relevant to your buyers when determining what content and messaging to send out.



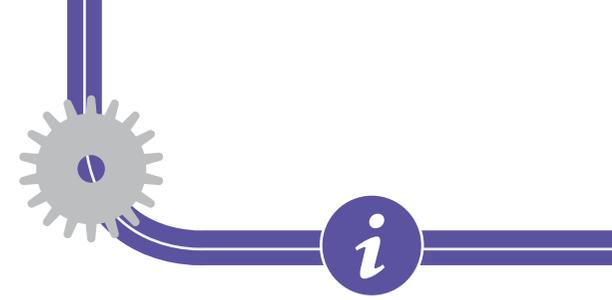
## 2. COMMUNICATION MUST BE TWO-WAY

No one likes to be yelled at (which is often what it feels like when marketers send out batch-and-blast messages). In order to engage a prospect or customer in dialogue, the communication must be two-way. In other words, people will be more open to hearing what you have to say if they know you are also listening—that's the true meaning of a conversation. And to enable this, you need technology that can do more than just blast out messages. Specifically, you need to use a platform that can “listen” to what prospects are saying or doing so you can respond accordingly and engage them through dialogue.

However, listening is easier said than done. Many marketers are engaging in silo channels based on what's easiest due to the technology available to them. For example, email is a no-brainer for most marketers and a primary form of communication. But it gets more difficult when it comes to integrating email communications with direct mail, teleprospecting, social, and other channels. Yet, you need a holistic cross-channel view of how buyers are reacting to your campaigns and messages. It's the only way to create a meaningful, two-way conversation.



# Four key elements



## 3: GO BEYOND EMAIL

Today's buyers spend time in a variety of places, whether your website, on their preferred social network, or even at an in-person event. And it's important to be able to engage them in any or all of these channels. If you don't, your competitors probably will.

Regardless of which channel you're engaging through, the key is to be social with all of your interactions. And remember, social is really about interacting, whether you're engaged in a dialogue or activity with someone. In fact, social elements are interactive in nature. Consider a poll. You can ask a question that is relevant to a prospect and by listening to the answer, you gain more insight into that prospect's interests and needs. At the same time, social interaction enables you to share content with prospective buyers, while allowing them to share that with their colleagues and peers. Social interactions inherently make it possible to expand the reach of a conversation.



## 4: CONTINUE THE CONVERSATION

The conversation shouldn't end once a prospect becomes a customer. Rather, it's just the start of a long-term relationship.

Regardless of what the customer lifecycle looks like for your company, the conversation with your customers needs to continue and change over time as it relates to your objectives and goals and those of your customers. For example, a brand-new customer will be focused on product adoption while a customer of five years will want to understand how to take advantage of additional products and features.

As the conversation continues, your organization can tap into numerous opportunities to generate more revenue through upsells and cross-sells, as well as to build loyalty that encourages referrals. But to achieve those goals, you need to deliver content and spark discussions in line with the customer's focus.

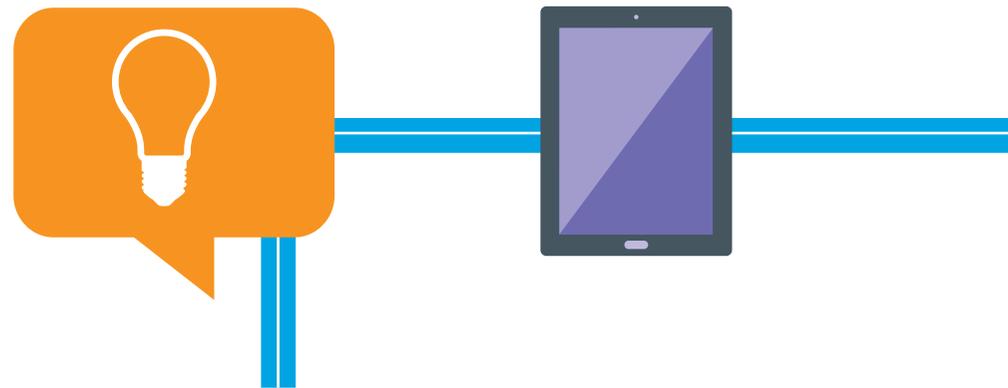
Let's fast forward a bit. Now our prospect is a customer. And she's participating in your user community, asking and answering questions, posting ideas, and voting on others. As her level of contribution to the community increases, you reward her with recognition amongst her peers. This is akin to saying "good job" to a co-worker after a successful project. You might even extend an offer that encourages the customer to refer new customers to you in exchange for a discount. Both of these measures go a long way to instilling feelings of goodwill that help solidify the relationship.

# Engagement Marketing in Action

Now that we've defined engagement marketing, let's go through a specific example.

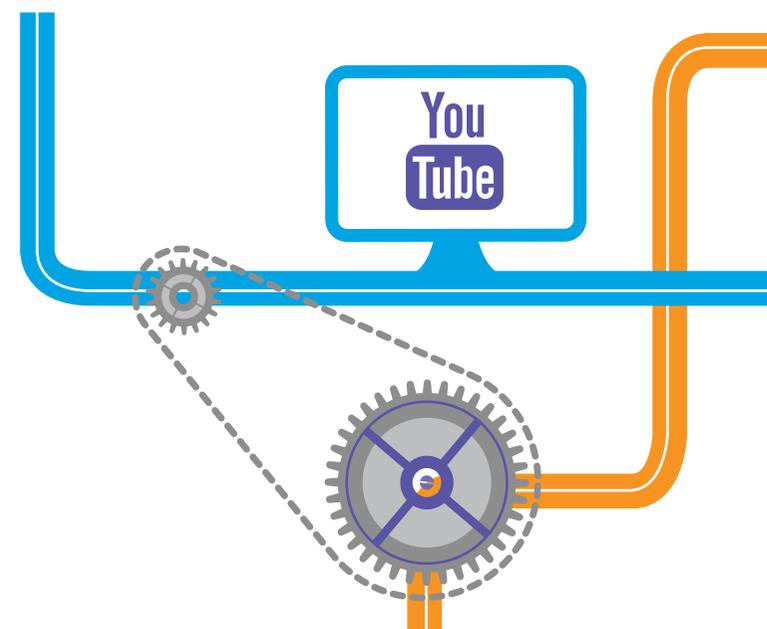
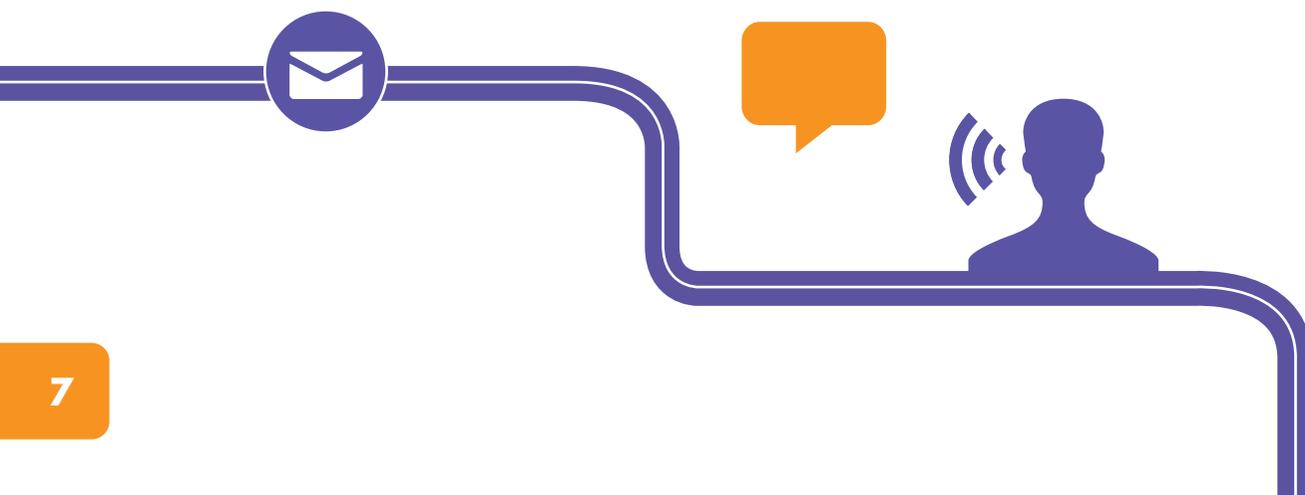
Let's assume one of Marketo's potential customers begins by searching Google for Social Referrals. She has some interest in learning about social marketing, specifically referral programs, so she clicks on our listing. Once she arrives on our site, she accesses our resource section, and provides her email address in exchange for downloading a content asset.

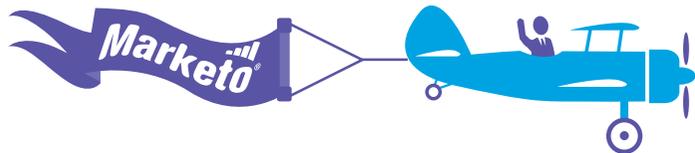
This kicks off a campaign on our end. Based on the search term the prospect plugged into Google, our marketing automation system automatically determines whether or not she already downloaded a highly relevant piece of content. In this case, she has. She downloaded an asset around social marketing. So we send her an email containing a YouTube video about our referral application. After sending the email, we "listen" to see if she engages with our content. We see that she ends up watching the video.



Since we know she watched the video, we want to further engage her. Through a social poll, we ask a relevant question, one that focuses on her overall goal for running referral campaigns. Then we listen. And we hear her say that she is interested in running referral campaigns in order to increase attendance for one of her company's live events.

After hearing that, we give her a short break from our conversation. But the following week, we send an email highlighting a success story about event success as a result of referral marketing. The email includes a call-to-action to access a live demo of how the referral app works. Then we listen, and we don't hear anything.



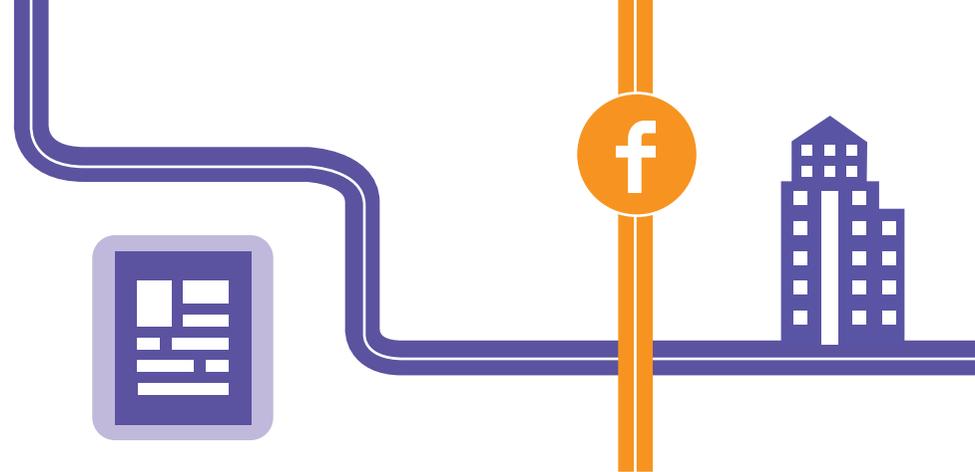
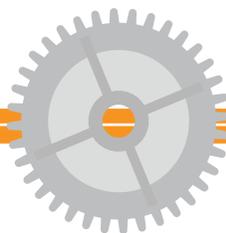


## Rather than give up, we send the offer through a different channel.

Because this lead has a high score and represents potential high value, we send the offer to her via direct mail with a PURL (a PURL is a Personalized URL, which includes the customer's name as part of the URL). Then we listen again.

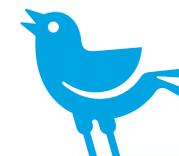
When the prospect visits her personalized landing page and clicks the demo-request button, our software automatically creates a CRM task for the lead owner to follow up immediately. When the rep calls, he has a meaningful and relevant conversation with the prospect, and sets up a trial.

When the trial account is created, the conversation continues in the form of a welcome email with tips on how to get started. The goal is to help our prospect achieve quick success in order to accelerate her journey toward becoming a customer.



Because our prospective customer is having success using the application, she tweets about it. And we're listening. So when the tweet goes out, we see it, re-tweet it, and send her a quick thank you for saying complimentary things about our application.

As the prospect continues diving deeper into the application, we are listening for usage. More specifically, we're looking for specific milestones to be completed. If the prospect crosses these milestones within a specific time frame, we will send her a congratulations. If she doesn't achieve them in our defined time frame, we send helpful tips to get her to the next step.



## What's Holding Marketers Back?

So why aren't more marketers tapping into the power of engagement marketing? Well, the truth is that it's been too challenging.

Marketers have been using many, disconnected systems in order to connect with their audience. These systems are hard to use, and don't play well together. Even when they turn to technology like marketing automation solutions, marketers have found the solutions too complex, forcing processes to be set up in a flowchart-like manner. It's labor intensive to set up a marketing program this way. Plus the technology is too linear and inflexible to reflect the true nature of interactions with prospects and customers.

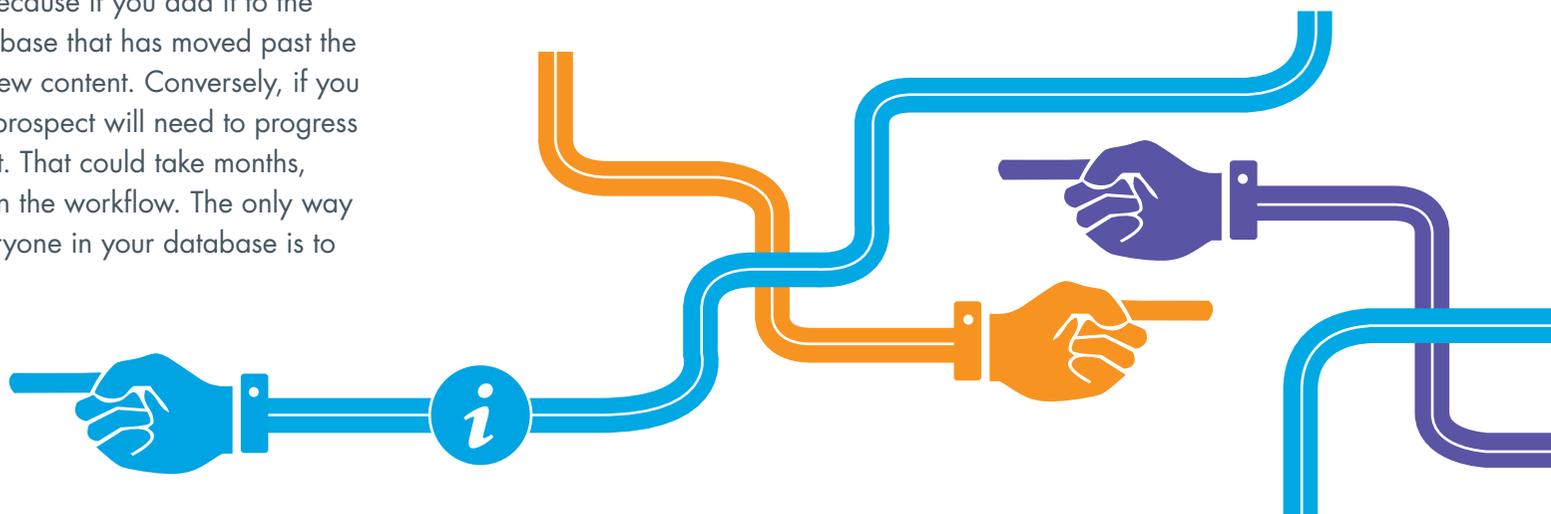
What starts off as simple can quickly become extremely complex, because each new statement creates an entirely new branch in the stream. Eventually your workflow looks like a bowl of spaghetti and you're unable to make heads or tails of it. Something as easy as adding new content to the workflow quickly becomes a nightmare because if you add it to the beginning of the stream, anyone in your database that has moved past the first step of the workflow will never see that new content. Conversely, if you add content to the end of the stream, a new prospect will need to progress through the entire workflow to see the content. That could take months, depending on how many content assets are in the workflow. The only way to make sure that new content is seen by everyone in your database is to completely re-architect the entire track.



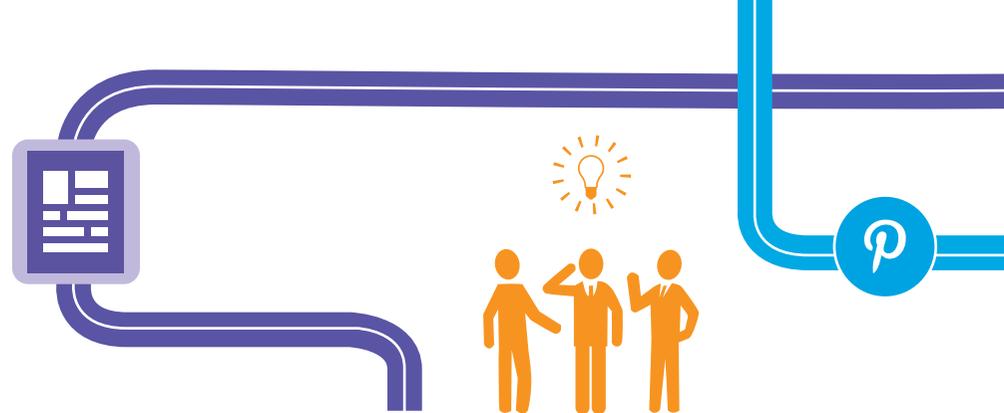
### WHAT MAKES FOR A TWO-WAY CONVERSATION?

Listening is arguably the most important part of an engaging, relevant conversation.

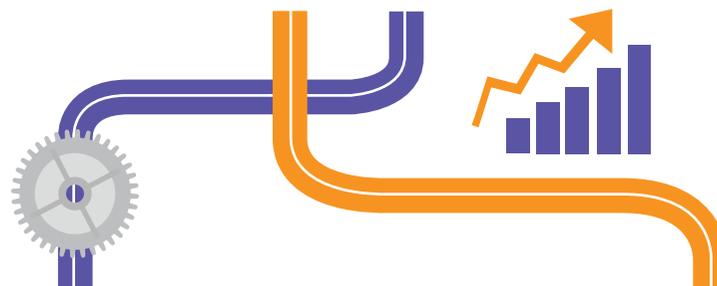
Because most marketers find it too complicated and frustrating to set up and manage these solutions, they fall back to simple drip campaigns that aren't sufficient to create the level of engagement and relevancy that's needed today. These campaigns—typically limited to one-to-many email communications—don't provide a way to “listen” to how prospects and customers are interacting with and reacting to the messages and content being sent. And if marketers can't listen in this way—across channels—they can't respond with the next relevant message or content asset.



# What to Seek in a Solution for Engagement Marketing



- ❑ **ENABLES YOU TO LISTEN AND RESPOND** to individual behaviors in real time.
- ❑ **ENABLES YOU TO COMMUNICATE WITH PROSPECTS AND CUSTOMERS BOTH ONLINE AND OFFLINE** with interactive social elements that help amplify your messages.
- ❑ **EMPOWERS YOU TO SET A LIMIT** to the number of communications anyone can receive in a given time period. This is especially valuable when different areas of the organization are sending messages.
- ❑ **DETERMINES WHICH CONTENT TO SEND AND WHEN** based on the recipient's actions to date (such as visiting your booth at a show, downloading content, or reaching out to sales rep).
- ❑ **SCALES TO SUPPORT** hundreds, thousands or millions of prospective buyers. The ideal system makes it easy to set up marketing programs and includes built-in intelligence to automatically keep marketers connected with prospective buyers.
- ❑ **HELPS BUILD RELATIONSHIPS OVER THE ENTIRE CUSTOMER LIFECYCLE**—from the awareness stage through customer onboarding. The right solution can help engage prospects and customers over time by sending relevant content to buyers through multiple different channels instead of just via email.
- ❑ **HELPS YOU MEASURE TRUE ENGAGEMENT.** The ideal solution should measure the degree of customer engagement with the entire program as well as each component of content over time.
- ❑ **IS EASY TO IMPLEMENT.** We all know how frustrating it can be to rely on the IT department to help us get programs off the ground. Look for a solution that allows any marketer to create powerful engagement programs that are easy to set up and manage. After all, you want to focus on what matters most—creating compelling content that will more deeply engage prospects and customers.
- ❑ **SIMPLIFIES CONTENT MANAGEMENT.** For example:
  - The ideal solution allows you to add new content simply by dragging and dropping it into the workflow.
  - The system should be intelligent enough not to send the content to those who have already received it.
  - It should be smart enough to know if someone has downloaded that content through another channel.
  - For limited-time events and special offers, the system should automatically activate the content at the right time and pull it out of the stream when the event is over.

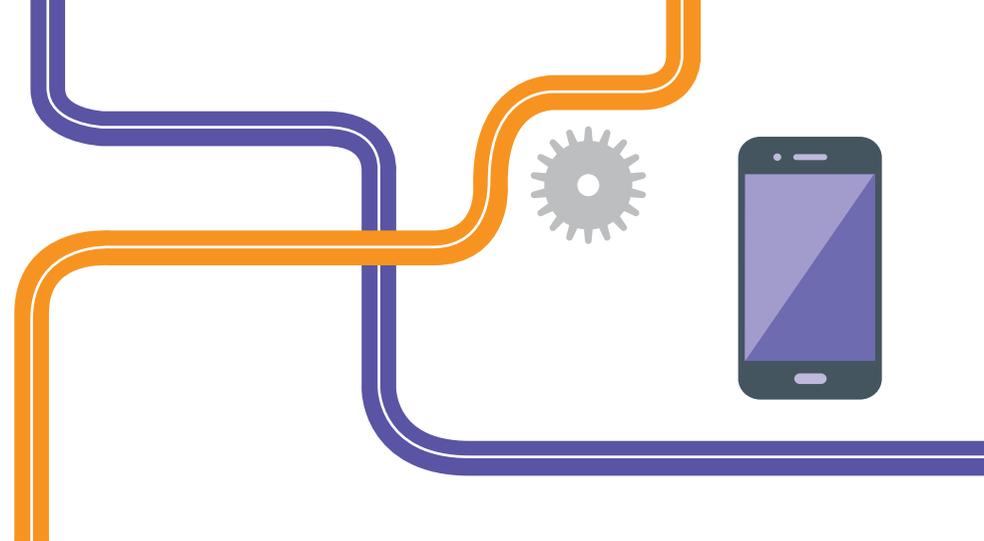
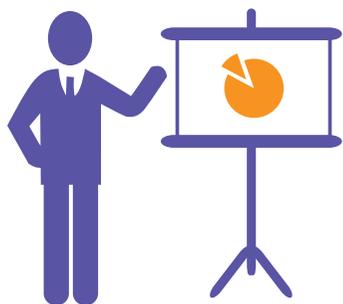


# Introducing Marketo Customer Engagement

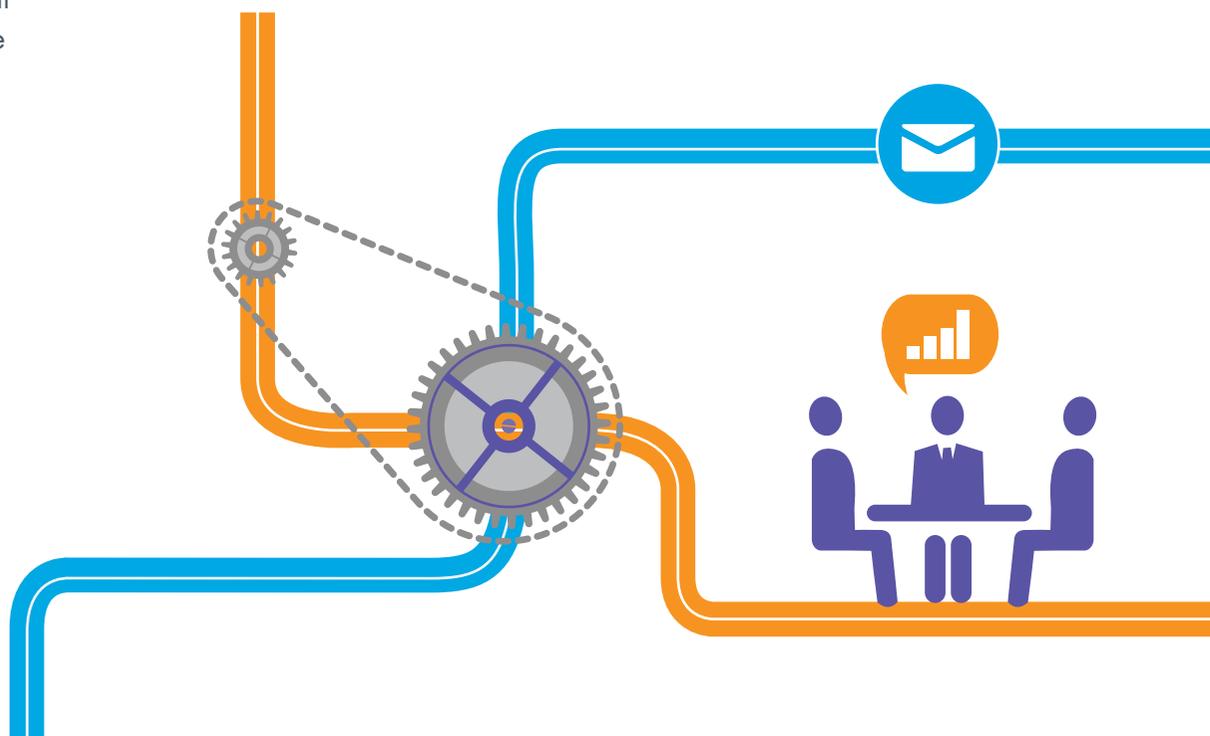
Such a solution is available from Marketo through our new Customer Engagement engine for marketers of all sizes.

Our unique Customer Engagement engine automatically and intelligently sends prospects and customers the best message and the best piece of content, based on who they are, what they have seen in the past, and their behaviors. You simply drag content into a stream—which can be thought of as a conversation—and the system automatically manages the timing and sending of the right content to the right person at the right time. The system even takes outdated content out of rotation in a particular program. And it warns you in advance when there isn't any more available to continue the conversation.

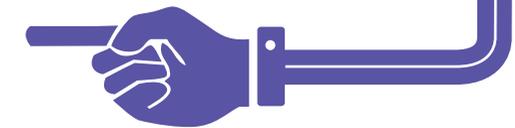
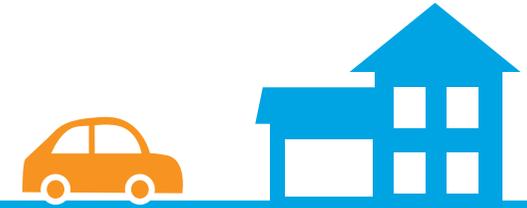
Just as important, the Customer Engagement engine gives you fantastic analytics and insight into the performance of your content and messages. It does this through an engagement score, which is a single metric that not only tells you how your content is performing compared to other



companies, but more importantly enables you to instantly determine how each piece of content is performing relative to one another. That means you don't need to wade through a sea of metrics—such as open and click-through rates—in order to figure out what is working and what is not. Moreover, this unprecedented depth is now curated and presented in a way that saves you hours of manual analysis and headaches.



# Marketo Customer Engagement Engine



A screenshot of the Marketo Customer Engagement Engine interface. The interface is divided into several sections. On the left is a sidebar with a search bar and a tree view of 'Marketing Activities' including categories like 'Sample Engagement Program', 'Lifecycle Engagement', 'Late Stage Prospect Content', 'Customer Content', 'Upsell Content', 'Social Webinar', 'Archive', and 'Other'. The main area is titled 'My Marketo' and has tabs for 'Marketing Activities', 'Design Studio', 'Lead Database', and 'Analytics'. Under 'Marketing Activities', there are sub-tabs for 'Lifecycle Engagement', 'Streams', 'Setup', 'My Tokens', and 'Members'. The 'Streams' tab is active, showing three columns: 'Early Stage Prospects', 'Late Stage Prospects', and 'Customers'. Each column has a frequency and time schedule, a 'Content' tab, and a 'Transition Rules' tab. The 'Early Stage Prospects' column is scheduled for 'Every Tue | 8:15 AM PDT' and lists content items like 'Social Webinar', 'Early - 5 Rules for Effective Blog Posts', 'Early - Amplify your Inbound Marketing', 'Early - Creating Content that Sells', 'Early - Definitive Guide to Marketing Metrics', 'Definitive Guide to Social Marketing', and 'Early - Building Effective Landing Pages'. The 'Late Stage Prospects' column is scheduled for 'Every 2 weeks on Thu | 9:30 AM PDT' and lists 'Late - Industry-specific Case Study', 'Late - Marketing Automation White Paper', 'Late - Marketo Customer Reviews', and 'Late - Video Testimonial Montage'. The 'Customers' column is scheduled for 'Day 1 of every month | 11:54 AM PDT' and lists 'Welcome to Marketo!', 'Best Practices for Deployment', 'Top 5 Marketo Tips and Tricks', 'User Community Promo', and 'Refer-a-Friend Promo'. At the bottom of the screenshot, there is a small copyright notice: 'Copyright © 2013 Marketo, Inc. All rights reserved.'

The result? Your job as a marketer becomes radically less complicated and you become far more productive as you stop wasting time manually creating and recreating workflows and instead focus on being a marketer and creating engaging content.



## Adopt a new approach to lead nurturing

In today's world dominated by self-educated buyers, marketers like you need to adopt a new approach to lead nurturing.

You need to build awareness of and affinity for your brand while a prospect is self-educating. By doing so, you can shorten the sales cycle, increase your lead-to-opportunity conversion rate, and drive more revenue. At the same time, you need to build brand loyalty after the sale. This opens the door for more upsell and cross-sell opportunities, leading to higher lifetime customer value.

The key to achieving these goals is to tap into the power of engagement marketing. Through this new approach to lead nurturing, you can engage prospects and customers in a dialogue, continually fulfill their needs and ultimately elicit a positive emotional connection that translates into customer loyalty and higher revenues.

As you seek a solution to serve as the foundation for your engagement marketing, look for one that makes it possible to:

- Ensure relevant communications
- Engage in two-way communications with prospects and customers
- Engage via more channels than email
- Continue the conversation once prospects become customers



# About Marketo

Marketing Software. Easy, Powerful, Complete.

Marketo, (NASDAQ: MKTO) uniquely provides an easy-to-use, powerful and complete marketing software platform that propels fast-growing small companies and global enterprises alike. Marketo® marketing automation and sales effectiveness software streamlines marketing processes, delivers more campaigns, generates more win-ready leads, and improves sales performance. With proven technology, comprehensive services and expert guidance, Marketo helps thousands of companies around the world turn marketing from a cost center into a revenue driver.



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