

The Role of

**EMAIL**

**AUTOMATION**

In Lead Nurturing



# TABLE OF CONTENT

• Lead Nurturing: What Makes it a Must-have for Businesses	1
• Why Use Email for Lead Nurturing	3
• Setting up your Lead Nurturing Campaign via Email - A Step-by-Step Guide	5
• Segmentation for Lead Nurturing	8
• Role of Automation Workflow in Lead Nurturing	14
• Advantages of using Workflows	
• The Components of a Workflow	
• Best Practices for an Effective Workflow	
• Types of Automation Emails to Send	20
• Wrap Up	26
• About Email Uplers	27

# LEAD NURTURING

What Makes it a Must-have for Businesses



*96% of visitors who come to your website aren't ready to buy (yet).*

### **Are you ready to convert them?**

Let's imagine a scenario- you are scrolling through the movie ticket booking app. You just want to know which movies have released. You read through the premises and find a movie that interests you. Next, you check the timings and see if they are convenient for you. The process from just browsing the movies to actual booking is technically how your lead nurturing works.

**“A marketer's job does not end  
with bringing in leads.  
It actually starts from there.”**

You have to double your efforts, from when you started generating leads, in order to nurture the leads and convert them into customers.

### ***Email plays a vital role in this matter.***

Lead nurturing is a process where you email the prospects materials that will educate them about your business, how you work, the kind of products/services you offer, and how you can help them.

To make sure you are not really pushing the leads towards the exit, you need to understand them.

- Know what stage of buying they are in.
- Find out what sources they are looking for to complete the purchase.

The flow of the emails and the content depend on the number of emails you will be sending, the frequency and the type of communication you intend to have.



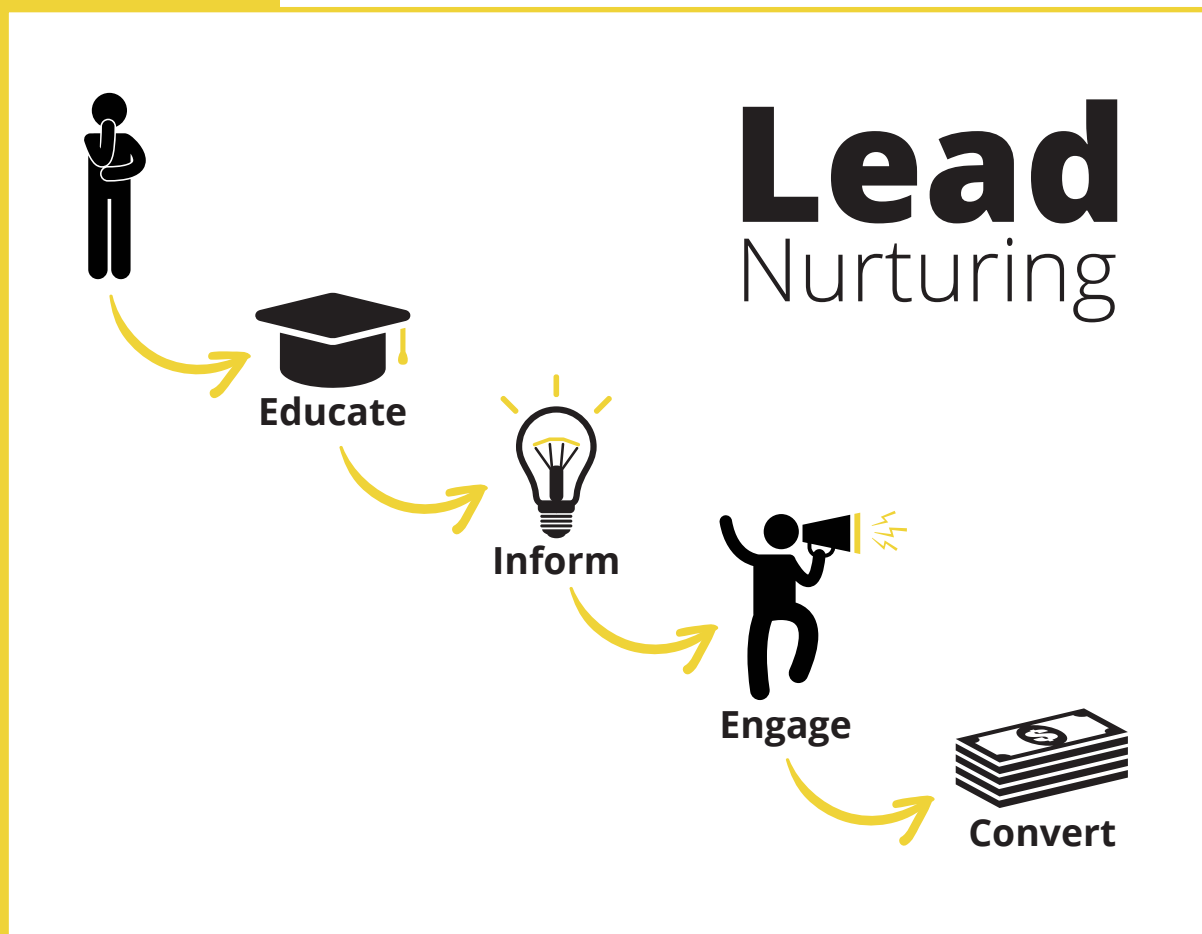
# Why Use Email for **LEAD NURTURING**



*Did you know 35-50% of the sales goes to the vendor who responds first?*

When your lead makes the first contact, it is important you send your first email, immediately. This will let them know you are interested in helping them complete the purchase. Lead nurturing via email not only engages them with your brand but also keeps you on top of their mind. It helps you stay connected with the prospect, reminds them of your product and moves them ahead along the buying curve.

You get to know your leads better once you start nurturing them. With constant and consistent email communication, you know what your leads are interested in, the challenges they are facing, and what it is that will make them complete the purchase. This is an essential insight for those who want to increase their sales and profits. Here's what a lead nurturing process looks like:



The background of the entire page is a dark, textured surface. In the lower half, two hands are visible, palms up, holding several glowing, 3D wireframe envelope icons. Some icons are red and some are blue. The icons have a soft glow and a slight shadow, giving them a three-dimensional appearance. The overall aesthetic is modern and digital.

# Setting up a **LEAD NURTURING** Campaign via Email

## A Step-by-step Guide

Now that we know how effective a lead nurturing campaign is, let's work on how to set it up.

These steps may seem basic; however, you might not be able to maximize your profits if you don't work through them.

### **Step #1: Set your goals right**

Before setting up your lead nurturing campaign, ask yourself this question- what are you trying to achieve from this campaign? Are you aiming to improve the quality of your leads? Do you want to awaken the prospects that have stopped engaging with you? Do you want to help them with research, so that they consider your brand for their purchase? The goal changes according to the stage at which the subscriber is in your sales funnel.

For example, a lead downloads a gated content, while in the research stage. You will need to nurture this lead using the lead nurturing emails that will best suit their needs and make them sales-ready.

### **Step #2: Emails for persona**

When planning your lead nurturing campaign, you might want to think through the content that you want to send out in the emails. For example, if it is the first email in the nurturing process, the content would be more along the lines of welcoming the prospect and introducing them to your business. If they are in the consideration stage, your content should be persuasive and should make them look at your business from purchase perspective.

At each stage in the campaign, you need to ask yourself – “what problem am I solving?” This would help you define the persona for the stage, and then the content.

**“A good buyer persona  
makes a marketer's life easier.”**



### Step#3: Re-purposing the content

Content is the key to lead nurturing.

Give your leads something that will help them understand the usefulness of the service or product your company offers. It is important to educate them before you send them to the demo/quote page. They should believe that coming to you will help them get value for money.

However, there is no need to create new content all the time. You can always use the content that you have in the archives. You just need to check if the content you are planning to send matches their requirement at that time.

The idea is to utilize the content that you believe will get you the maximum conversions. If you believe a blog can be converted into an e-book or a video, try doing so. This repurposing will help you get best results without investing much time in writing new content.

### Step#4: Timeline for the emails

Let's begin with a word of caution: don't try to send too many emails to your prospect or they may unsubscribe you, or not want to hear from you ever! That can be quite daunting.

Identify how many emails would it require for your prospect to enter the sales cycle. This would help you define the timeline for your emails as well.

Larger business purchase decisions take anywhere between **18-24 months** from the first contact with you. This means you need to plan your emails in a monthly fashion.

What date or time of the month would you want to send out the email should be decided right from the start. You can always send the emails at different time/date for the first few months so that you know which time/date gets the perfect response.

### Step#5: Measure with the metrics

Sending out emails is not enough; you must check if they were opened and received the response you were aiming for. Tie your email metrics to the goals you have defined for each email within the campaign. If you want to improve the brand's awareness and make it stay on top of your subscribers' mind, you might want to check for the direct traffic to your website.

Metrics will also help you improve your offering, the subject lines you use, and the content you send out to your leads. With the metrics and proper measurement, you will be able to send out the right messages to the right leads.

# Segmentation for **LEAD NURTURING**



## What happens when you do not segment your email campaigns?

- You may experience a decline in the number of open and click-through rates.
- You may notice a rise in the unsubscribe rate.

## And what happens when you segment your email campaigns?

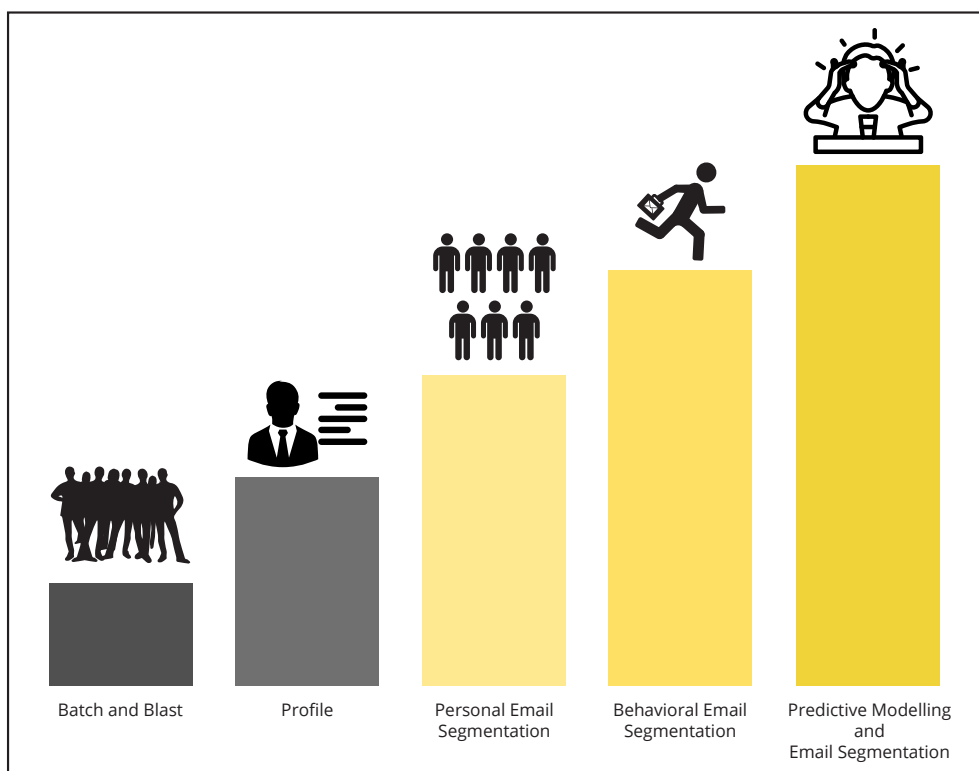
These stats speak for themselves:

Opens	14.31% higher than non-segmented campaigns
Unique Opens	10.64% higher than non-segmented campaigns
Clicks	100.95% higher than non-segmented campaigns
Bounces	4.65% lower than non-segmented campaigns
Abuse Reports	3.90% lower than non-segmented campaigns
Unsubscribes	9.37% lower than non-segmented campaigns

*A segmented campaign shows 100.95% increase in clicks than non-segmented campaigns.*

The segmentation of the email list depends on the challenges the subscriber is facing at the point and the sales cycle stage of the lead.

Here are the different stages of segmentation:



*The email campaign will differ at each stage, and the goals will define the content and type of email. The end goal is to nurture the leads using the segmentation type most applicable to the stage and make them sales qualified.*

As mentioned earlier, not all the leads in your list will convert into customers. Some of them will become brand influencers or evangelists, helping you build and grow your brand. These people will help you share your content with more people, in turn getting on-board the leads who will finally convert.

Let us talk about the segment that is not going to purchase. These people or brands will help you market your products/services, will introduce your brand to the influencers in the niche, and get the word across to the target audience.

When segmenting the campaign, you might want to consider the following factors, which would help you maximize the benefits:

## **1 The Content of the Emails**

Your leads will be in different stages of buying when you are nurturing them. The content will differ according to the stage in which the lead is.

When you want to attract a prospect to your site, you may want to give them good offers. The advantage of sending out promotional offers is improving your brand's value and converting the prospects into sales qualified leads and finally customers. At the research stage, you want to educate them about the services/products you are offering. And if the lead is in the consideration stage, you might want to suggest a demo, which can help them advance to the purchase stage.

With the help of analytics, you will be able to get insights, which will help you craft the content of your email. Here are some points that you need to work on:

- Identify which landing page works best with the leads.
- Figure out what your leads are looking for when they visit your landing page.
- Check the performance and the average conversion rate for the landing pages.



## Stage-wise content for your lead nurturing campaign

### 1 The Awareness Stage

This is the stage when your leads determine if they need your products/services. You might want to introduce your brand and make them familiar with your offering. You could send in some educational materials, which includes ebooks, whitepapers, blog posts, etc.

### 2 The Research Stage

Offer free trials or demos at this stage, when they are digging deeper into the research and want to know more about your product.

### 3 The Evaluation Stage

Help the leads know why choosing your business makes sense to them. This is the stage when they are researching alternatives and will identify quite a list of businesses that serve them with the same products/services.

### 4 The Purchase Stage

Quality is the main concern for leads at this stage. You might want to assure them of the good quality that you will be serving them with.

### 5 The Post-purchase Stage

Check if the customers are happy, sell them something that they might find useful, and get them to upgrade. This is another level of lead nurturing, where you are actually nurturing the customers.



## 2 Stage-based segmentation

What stage is the audience in? The answer to this question will help to improve your segmentation methods and techniques.

The emails and the type of nurturing will differ based on the segments. The actual process of segmentation takes into account the geography of the lead, their interests, and habits, their persona as well as the buying stage.

## 3 Consider the ESP

How does your ESP treat lead nurturing emails? Are you able to create campaigns easily? Are there built-in tools to grow your email list?

The modern ESPs come with a lot of tools to make the segmentation right and help you build the list according to the nature of the lead, making nurturing easy. You get reports and analysis, making building insights effortless for you.

You should know how your ESP responds to the email list segmentation needs, and how it works on creating the campaign.

## 4 Subject Lines

It is important that you work on the subject lines when sending out lead nurturing emails. The subject lines will change with each segment, as the content and the purpose of targeting the segment will change. An attractive subject line is a good way to get your target to read your emails. However, **click-bait subject lines should be avoided**. Here are some points you should keep in mind:

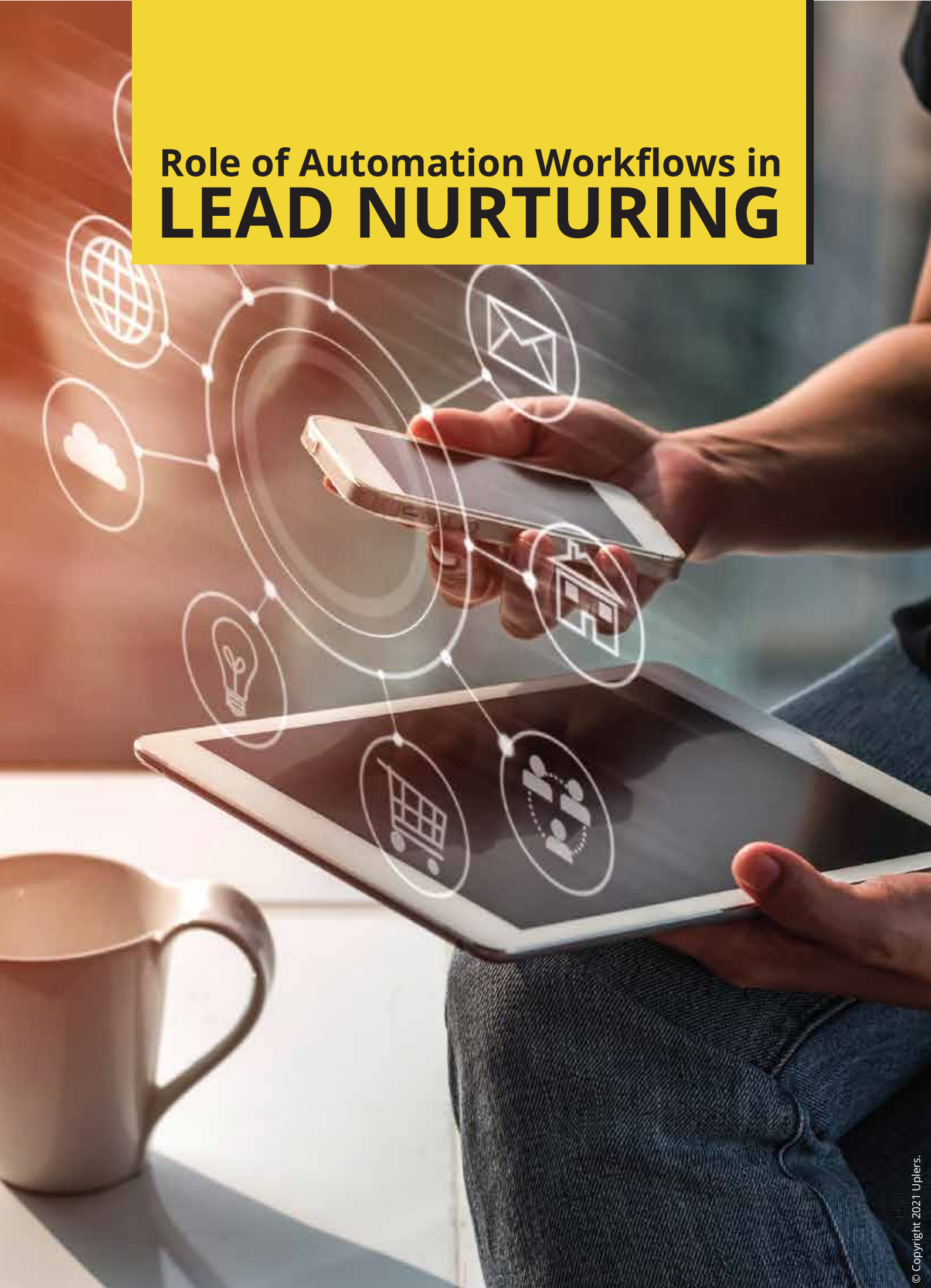
- Align the subject line with the content you are sending.
- Create a subject line that the lead would connect with.
  - 'Free demo' in the subject line would attract people who are researching and considering buying the product.
  - 'Free discount on first purchase' would attract people who don't know your brand.
  - 'Download free eBook' will attract people who want to know more about your products/services.

- Don't use words that will send your email to the spam folder.
- Make sure your subject lines are personalized. They improve your transaction rates 6x and lead to 41% increase in click rates.
- The subject line should focus on the benefit that you will be giving the user.
- Use power words that will catch the attention of the user.

However, managing and nurturing the leads manually can be quite hectic, and you might not be able to nurture them efficiently. That's why it is important to create campaigns and automate the process. It can be quite difficult if you cannot automate segmentation of the list and define which segment should receive what emails and at what time. The segmentation and targeting can become efficient and effective if you use workflows to manage your lead nurturing process.



# Role of Automation Workflows in **LEAD NURTURING**



It is important to understand what workflows are and how you can use them to improve your lead nurturing techniques.



*Workflows are a series of automated emails that are triggered based on the behavior of the prospect or the contact information provided by them.*

Workflows help in sending triggered emails, updating the lead stage and triggering the notifications.

### Advantages of Using workflows

- They make automation easy by allowing you to write simple rules. You can trigger the actions based on the information you have about your leads. This will help in sending out targeted messages to the lead.
- With workflows, you can segment your audience easily. You can group the leads you have received based on their behavior and send them the targeted content.
- Workflows can improve the quality of leads and increase the efficiency of your lead nurturing campaign.

The most important element in a lead nurturing campaign is timing. Workflows allow you to customize the timing of your campaign. You can decide the trigger time for each of the emails. How frequently do you want to send out an email to the lead? On what will the number and frequency of the emails depend?

*The email SEND time and frequency can be customized as per the nature of your campaign.*

## When to start working on workflows

- You want to work on the leads that are not yet ready to buy.
- You don't have quality leads in place.
- You are sending batch emails to the target audience, which is not getting the required response.
- You are manually sending follow-up emails.
- You are updating the contact details manually.

## The Components of a Workflow

There are essentially two components of a workflow: Starting condition and Triggered action

### 1 Starting condition

The starting condition, when met will trigger the workflow for the particular lead. There are three types of starting conditions:

#### When a form is submitted

If someone submits a form, you should ideally send a follow-up email with a downloadable to the lead. This can be your trigger to create a nurturing campaign for engagement with the person, in order to increase their interest in the topic and to educate them on the same. You might want to create a workflow with the topic of concern to make the lead sales qualified.

#### Lead is added to a list

When your lead is added to a particular email list, it triggers the workflow you have set up for that list. Suppose the person has visited the website, then the lead automatically gets added to the list which triggers the awareness stage lead nurturing campaign. There are automation software that help you create these lists.

#### No condition

You can start a workflow with the no-starting condition. You will have to add the contacts manually in this case. This works when you are holding a webinar or seminar and want to send out emails to the people who have signed up.



## 2 The triggered actions

Each condition mentioned above triggers an action. You will have to mention it in the workflow so that your automation software knows what step to take next. For example, if your user has downloaded the content that you send immediately after the starting condition, you might want to send the next email. You will need to decide the content for this next email and define it in the workflow.

### Action-types that You Can Initiate in the Workflow

#### Updating the contact list

The contact list should get updated when the lead's information either changes or updates. For example, someone has subscribed to your blog or website. The contact should get added to the database named 'subscriber' automatically. This holds true for any change made to the contact list. If the contact asks for a demo, they should be moved from the list they are on to the list that segments the 'high-quality leads'.

#### Sending out the automated emails

The second type of action that is triggered would be sending out automated emails to the target. This is essentially the purpose of the workflow. You can create the emails in advance and add them to the workflow. You can build a workflow for the campaign and include as many steps as you want. Your entire process is automated, once you have worked on the content and the steps.

#### Add/Remove the contact

You can handle your leads by adding or removing the contacts from the list. For example, if you are holding a webinar, and need to transfer the people who have submitted the form to a list named "registrants", you can add that as an action into the workflow and automate the process.

#### Send alerts

Alerting your team on changes in the lead is possible with this action. You can notify your sales team when the lead fills out an important form. When a social media influencer gets added to your list, this notification feature alerts you, and you can take the consequent action.

### 3 Time Delay

The timing of each trigger is important when you are sending automated lead nurturing emails. Along with the timing of the email, you may want to set up the time interval for the emails your lead will be receiving.

For example, if it is a welcome email, the first email is sent within first 3 hours. The second email is sent the next day or, after a certain time interval. You might want to add conditions that will help trigger this action in the workflow. Therefore, when the sign-up condition is met, the first email is triggered and sent to the subscriber's account. Similar time delays and conditions need to be added to the workflow, for smooth and automated email-based lead nurturing.

### 4 Settings

This is the last component of the workflows for lead nurturing. The settings will help you send the emails on a particular date with the appropriate content. For example, if you are using email marketing to connect with B2B brands, then you may want to send out these emails on weekdays alone. This can be included in the settings.

The email send-time is particularly important, as it allows you to send the emails at a time when subscribers are most likely to open it.

You can remove contacts from a particular workflow when they move to the next stage by using settings feature. For instance, if the lead converts to a customer, you may want to remove them from the list of leads and move them to the customers' list.



## Best Practices for an Effective Workflow

### Send multiple emails

When you are nurturing your lead, a single email or even a few follow-up emails may not help you. You need to set-up an email series, which is triggered using conditions that differ according to the stage of the lead you are following up.

### Track the nurturing

It is important to track your nurturing campaign as well as the leads. Update the leads to customers, once they have converted and remove them from the workflow. You can add conditions like “is being nurtured”, “has converted” to make tracking easy.

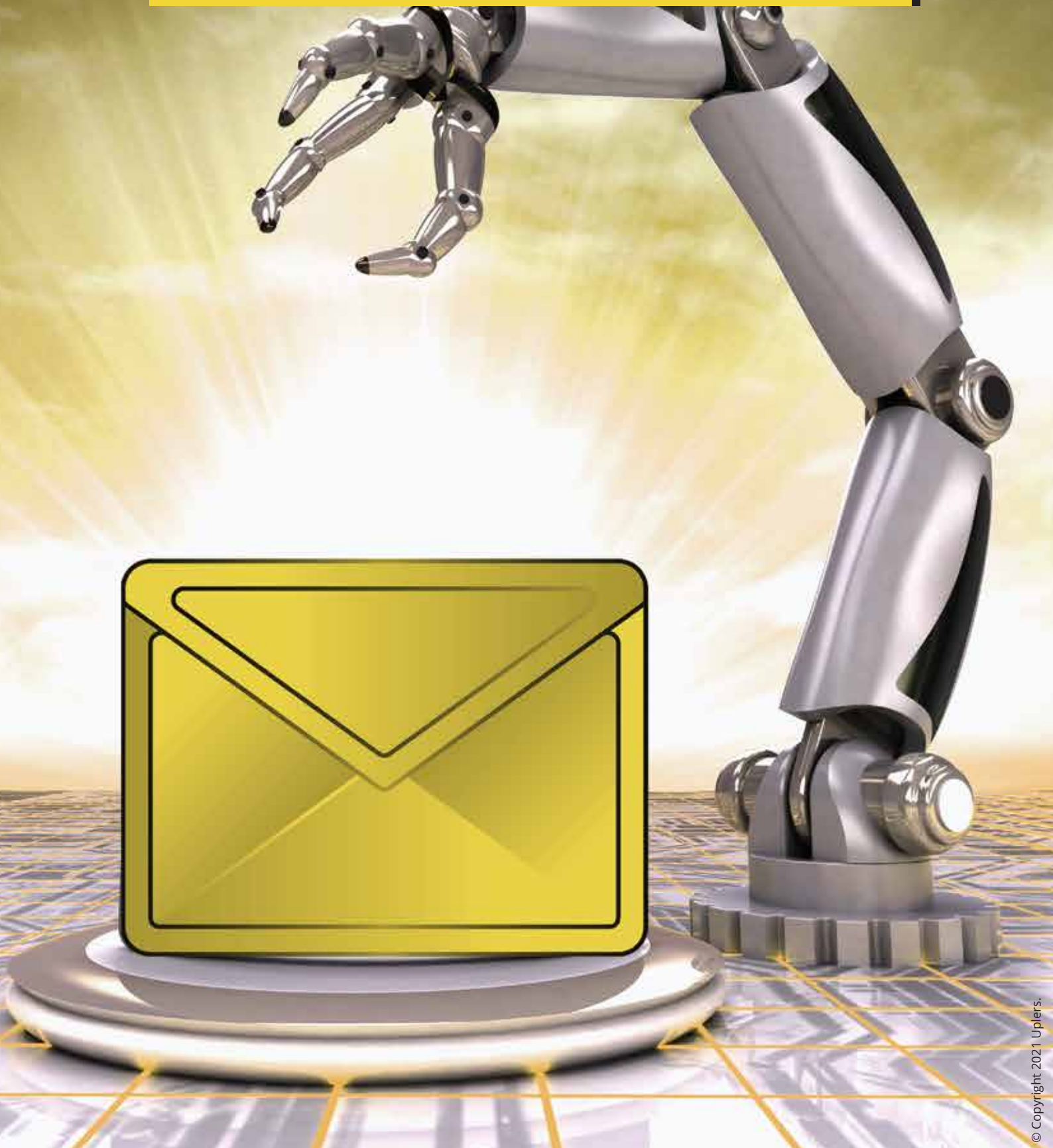
### Synchronize the workflows

If you have created multiple workflows, you may want to ensure they are synchronized. You don't want one workflow to remove contacts from the other. There are flexible settings within the workflow, which allow you to check on the multiple workflows created and if they are functioning properly. If the workflows face obstructions, you can remove them easily.





# Types of **AUTOMATION** Emails to Send



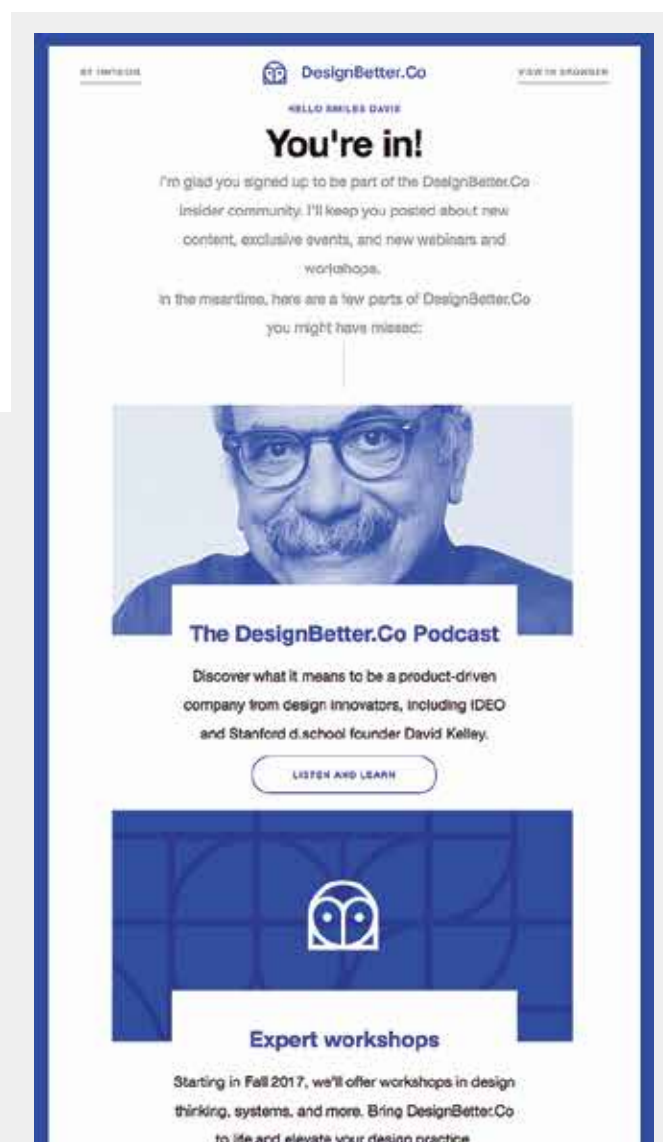
When nurturing the lead, you may want to engage them, educate them or convert them, depending on the lifecycle stage. Let's see the types of emails you should send depending on your goal.

## Emails to Engage the Prospects

### Email Type 1 Welcome

This helps you onboard the newly signed up prospects. The welcome email is an excellent way of educating and engaging the new prospects. As they are new, the email content should be designed accordingly. It is always a good idea to welcome them with a series of emails.

This email by Designbetter.co welcomes the subscriber. It gives them an idea of what to expect from the brand's emails. It is the first step towards engaging and nurturing the lead. The series of emails containing all the information and educational material about the brand will help engage further.



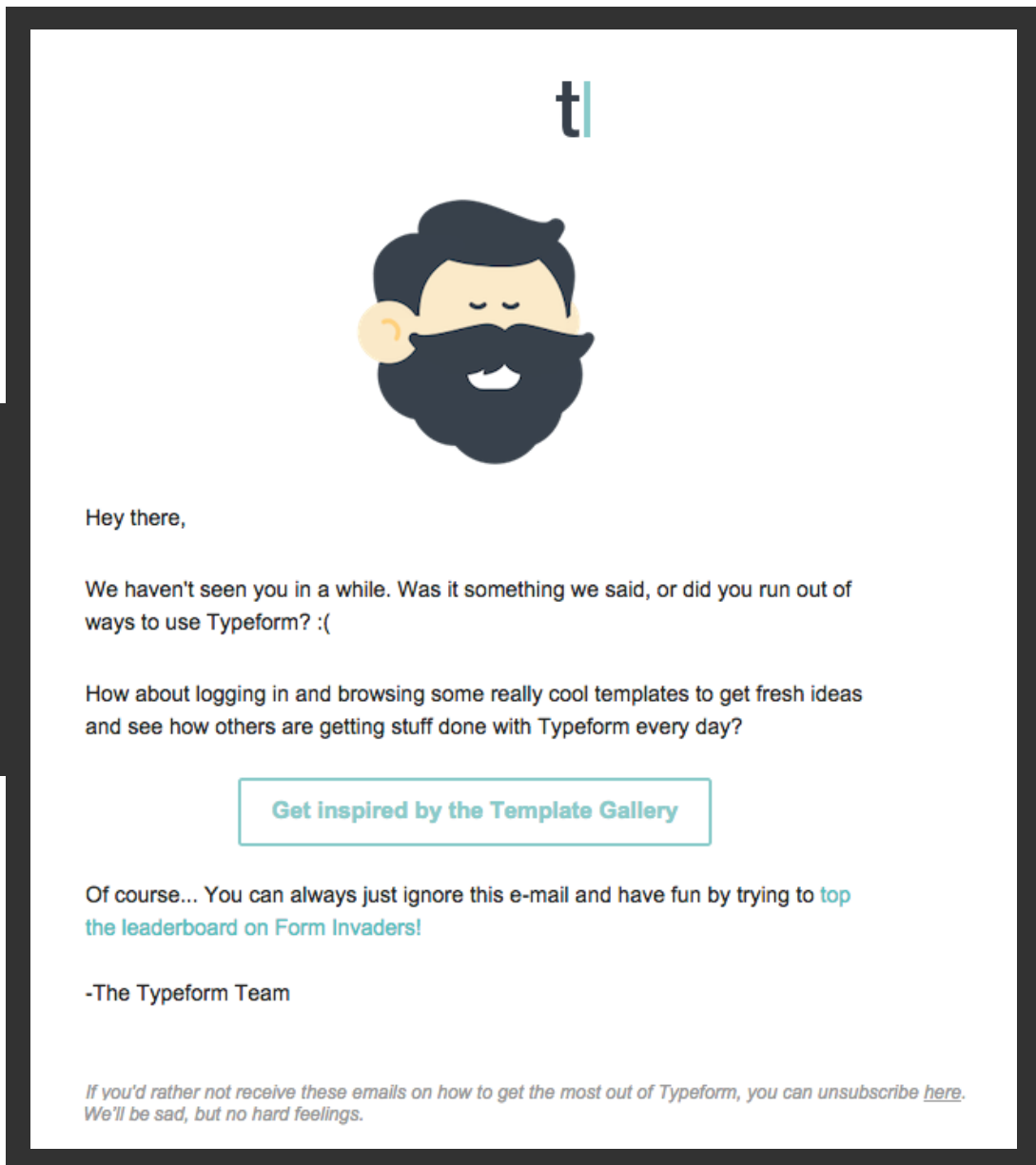


## Email Type 2 Pre-eminent

Even after on-boarding, your leads may not be sales ready. You need to ensure your brand stays at the top-of-the-mind. This is why you should engage your audience in the top-of-the-mind recall engagement campaigns. It is important to offer value to the prospect at each stage of their decision-making journey.

## Email Type 3 Re-engagement

This is a great automated campaign to nurture the leads who became inactive at some point along the decision-making journey. This will help get these inactive leads into the sales funnel once again. When you haven't heard from your prospect for a while, sending them a re-engagement email/s similar to the one sent by Typeform can help you get them on-board again.



## Emails to Educate the Prospects

When the prospect is in the research or consideration stage, it is important to educate them. Here are a few lead nurturing campaigns you can automate to educate the prospects.

### Email Type 1 Address the pain points

You can send out an automated email series, which addresses their pain points, and helps them understand how your product can help them. The content should offer everything the prospect needs to know about the product.

This email by Kid & Coe has identified five-star getaways in the USA. For the segment looking out for options, this is the perfect email, as it addresses their question with the right products.



**THE BEST OF AMERICANA**  
5 STAR USA GETAWAYS

**1 BRECKENRIDGE, COLORADO**

**THE HIGH RESIDENCE**  
Bright and sunny with spectacular views of the slopes, this quiet, family home in the charming historic district of Breckenridge, surrounded by aspens, is five blocks from summer alpine skiing and local skateboarding fun.

**2 TIVOLI, HUDSON VALLEY**

**THE TIVOLI BARN**  
Find true rustic luxury in this unique four-season barn renovated by local artists with a pool, steam and fire pits, only five minutes from the charming Tivoli village, and surrounded by acres of lush countryside to explore.

**3 CENTRAL AUSTIN, TEXAS**

**THE PARK RESIDENCE**  
This welcoming and artistic family home with a great back yard and family amenities is near Hyde Park in the center of one of Austin's walkable neighborhoods, close to children's museums and many local playgrounds.

**4 SONOMA, CALIFORNIA**

**THE RIVERSIDE DRIVE RESIDENCE**  
This riverfront Mid-Century modern cabin, surrounded by 1,000-year-old redwoods, is an ideal setting for river running, shopping Sonoma's markets, hiking in the

## Email Type 2 Highlight the USP

There are too many brands that focus on the same issue as yours. You may want to differentiate your product from that of the competitors. You can attempt this by highlighting your USP and showing how your product is different. This email campaign needs to be planned and segmented based on the prospect's needs and lifecycle stage.

## Emails to Convert the Prospect

At some point along the journey, your prospect is ready to convert into a customer. This is when you need to plan out campaigns that can close the deal for you.

## Email Type 1 Showcase your expertise

By now, the prospect is interested in you and is aware of your products and services. It is time to convert them. Send them an email that reinforces their belief in you. The content should convey why they should choose you. Industry reports and press releases that showcase your expertise can help you convert easily.

This email aptly explains why you should opt for Verizon. If the user was researching networks, and considering Verizon, this is the perfect time to send such an email.


Only on Verizon.

Devices Plans Why Verizon

The new  
Google Pixel 2  
on the best  
network.

Get up to \$300 off when  
you trade in select phones.\*

Buy now



Let's get you set up.

Call 1.877.615.3777

Locate a store >

Plans Phones Tablets Accessories Locations

New device payment activation required.

\*Up to \$949.99 device payment purchase & activation req'd. Less up to \$300 off trade-in promo credit applied over 24 mos; credit begins in 1-2 bill cycles after Verizon receives your device; promo credit ends when balance paid or line terminated/changed to another plan; 0% APR. Eligible trade-in must be in good working & cosmetic condition. Limited time offer. Devices eligible for trade-in promo credit:

- \$300 off: iPhone 6s/6s Plus/7/7 Plus, Google Pixel/Pixel XL, LG G6, Moto Z2 Force, Z Force, Samsung Galaxy S7/S7 edge/S8/S8+
- \$200 off: iPhone 6/6 Plus, LG G5/V20, HTC 10, Moto Z/Droid/Z2 Play, Samsung Galaxy S6/S6 edge/S6 edge+/Note 5
- \$100 off: iPhone SE, LG G4/V10, HTC One M9/M9+, Moto Z Play, Samsung Galaxy S5/Note edge/Note 4

Activation/upgrade fee: \$30. **IMPORTANT CONSUMER INFORMATION:** Subject to VZW Agmts., Calling Plan & credit approval. While supplies last. Limited time offer. Offers & coverage, varying by svc., not available everywhere; see vzw.com. Restocking fee may apply. In MA & NV: Sales tax based on higher of device price or VZW's cost. In CA: Sales tax based on full price of device.

Pixel, Pixel XL, Google, and other Google product names and logos are trademarks of Google Inc.

© 2017 Verizon Wireless

This email was sent to hello@SmileDavis.yeah. We respect your privacy. Please review our [Privacy Policy](#). You may [unsubscribe](#) from Verizon Wireless promotional emails at any time, or easily adjust your subscription preferences from your [profile information](#).

Verizon Wireless, One Verizon Way, Mail Code: 1805WB, Basking Ridge, NJ 07920

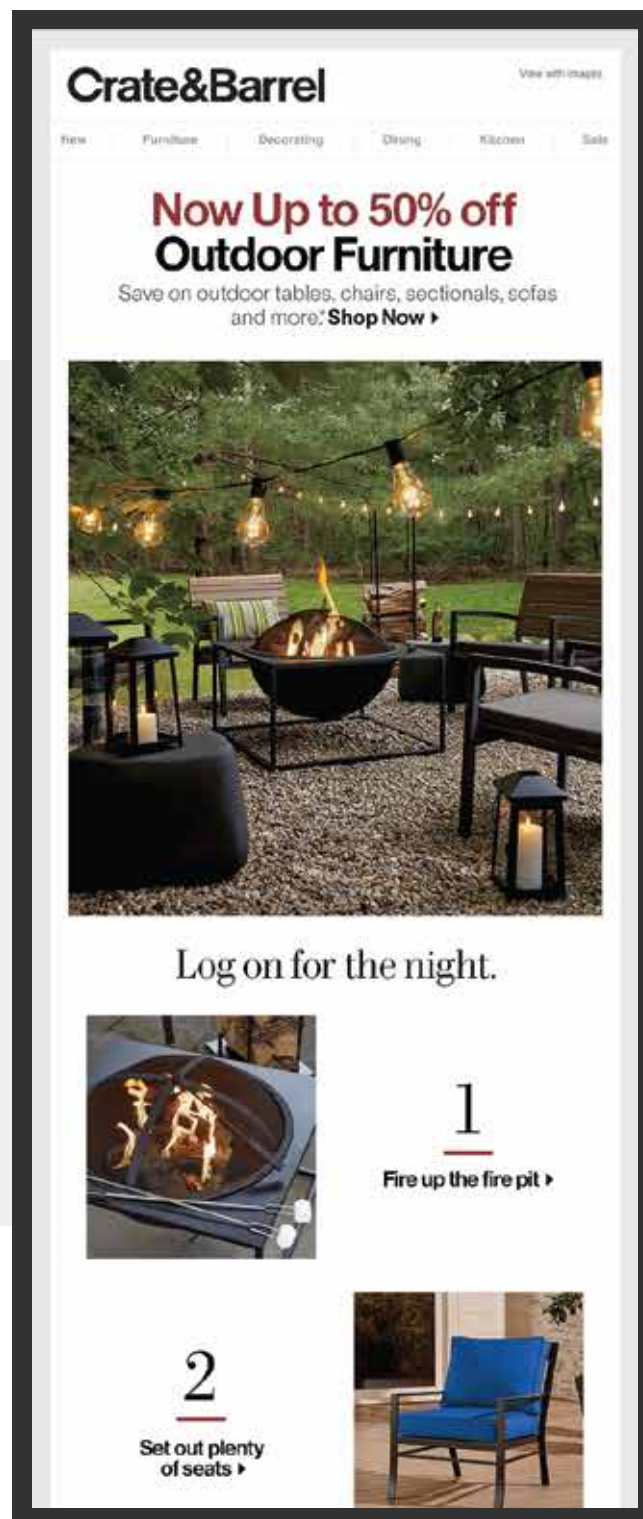
© Copyright 2021 Uplers.

24

## Email Type 2 Promotional campaigns

When the prospect is nearing the end of the sales funnel, you can offer them an incentive to convert. Trigger the purchase by sending out an email that offers them discounts. You can even offer special pricing to the prospect, which will convince them to complete the purchase.

The email sent by Crate & Barrel is the apt promotional mailer. If the prospect is already thinking about purchasing, this email will persuade them to complete the purchase.



# Wrap Up

It is not possible for you to send out emails manually to your leads at different stages of the sales cycle and convert them individually. This is where email automation comes forth as a boon.

Lead nurturing is essential for your business in order to improve the quality of the leads and increase the conversions. It helps you engage the leads, educate them, and make them sales qualified. Sending out multiple emails based on the lead stages has proven to be a great way to build relationships.



# About Email Uplers

Email Uplers are experts at designing and coding beautiful Emails, Newsletters and Landing pages with responsive layout Catering to **5000+ clients** worldwide, having coded **65,000+ templates** till date; offering 24/5 support, fastest-in-the-industry TAT of 8 hours & 100% money back guarantee to name a few. Email Uplers work with Direct Brands, ESPs and Agencies. Our clientele include *Disney, National Geographic, 21st Century Fox, Ogilvy, Oracle*, and more...

## Our Packages

### Email and Newsletters

Only coding  
(Design to HTML)

Starts @  
**\$49 USD**

Fresh Design  
and Coding

Starts @  
**\$149 USD**

### Landing Pages

Only coding  
(Design to HTML)

Starts @  
**\$228 USD**

Fresh Design  
and Coding

Starts @  
**\$378 USD**



---

## Get in touch!



+1 213 674 6665



email@uplers.com



**Disclaimer:** © Copyright 2021 Uplers. All rights reserved. No part of this publication may be reproduced, copied or transmitted in any form or by any means, or stored in a retrieval system of any nature, without the prior permission of Uplers. Although the greatest care has been taken in the preparation and compilation of this ebook, readers of this publication are advised to seek their own professional advice before taking any course of action or decision, for which they are entirely responsible, based on the contents of this publication.