BabelQuest

HubSpot Elite SOLUTIONS PARTNER PROGRAM

UNLOCKING POTENTIAL

How to Generate Leads that Close

Volume 1

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EDITOR'S NOTE

Three Small Words

Most of the time when a prospect tells us they want to generate more leads, they're doing so under the assumption that those leads will translate into sales. While that's the implication, it's not what they're explicitly asking, of us or their marketing teams. As a result, many organisations fall into the trap of reporting on leads generated without consideration for how this actually impacts business growth and revenue.

"Just leads?" we clarify. "Why not leads that close?"

This is often the moment when the prospect realises the true value attached to a non-qualified lead. That is, very little. Can you confidently say who the person behind the lead is? Do you understand what that person wants, and does their contact record support this? Are you tracking the way they move around your site?

Consider now *leads that close*.

As words go, they're small, and on their own they don't carry much weight, but put them together and you have several things: attributable revenue, a business goal, a measurement of success, a bridge along which you can align your marketing and sales activity, even a conversation starter. You have a means to describe the reason you and your team get up in the morning and do what you do, day after day.

For three small words, they pack a punch.

So how do you generate them?

Once an organisation recognises this distinction, they look at their marketing and sales activities in a different way. We help businesses like yours to better understand that activity in order to generate more revenue through leads that close. Sometimes that involves creating free resources to educate the directors and marketing heads among you with a willingness to learn and a genuine passion to grow your business.

This is one of those free resources. In fact, it's a compilation of several intended to guide you step-by-step along the process of generating leads that close. Dive in.

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A phenomenal opportunity

96% of the UK is reportedly now online and buyers are using that power to make more informed purchasing decisions. Make sure your organisation is the first thing they see when they do.

The acceleration to digital is all around us. The result is a fundamental shift in the way that today's buyers make purchasing decisions. To engage new prospects wherever they are in their buyer's journey, organisations must pivot their marketing strategies accordingly. Look at your own market for the evidence around you.

It's likely that greater connectivity has upturned the conventional seller/buyer focus. At the same time, there's been a substantial increase in the quantity and quality of opportunities for brands to connect with prospects. The setting has changed and the story has progressed, but the characters haven't developed with it. At best, this means many team's understanding of marketing, from the underlying principles to day-to-day tactics, is out of date. At worst, everyone is working from a different page.

> **"Reliance on digital was growing before the pandemic began, and a meaningful amount of this online penetration is expected to persist after the pandemic is over."**
> 'The evolving consumer: How COVID-19 is changing the way we shop', MicKinsey & Company

With the pace of change increasing almost daily, modern marketing leaders need to accept that it's impossible to 'know it all' before they create a strategy. This is why it's more important than ever to take an inbound approach, creating a plan around the element that matters the most: the organisation's prospects and customers.

> **"The companies that best provide customers the information they most urgently seek, specifically through the channels they most clearly prefer, are in a far better position to drive commercial success in today's rapidly evolving digital landscape."**
> Brent Adamson, 'Traditional B2B Sales and Marketing Are Becoming Obsolete', Harvard Business Review

For many, the approach described here is a hymn sheet from which we're already singing. Organisations adopting the inbound way of sales and marketing, first coined by HubSpot's co-founder Brian Halligan in 2005, will immediately recognise the value to be gained by creating informative content and distributing it intelligently over the right platforms to the prospects it will most benefit.

To future-proof their operations and drive a predictable, repeatable source of leads that close, organisations must adapt their processes to put the customer first. Just as an inbound approach to marketing is transforming the way organisations help prospects to become qualified leads, a customer-centric sales process will transform the organisation from one that 'tries to sell' to one that 'helps to buy'.

Adapting operations to become buyer focused is a transformative step, but it's absolutely crucial for organisations pivoting to generate leads that actually close.

Marketing and Sales naturally integrate with one another to serve the buyer together. When the organisation understands the inbound methodology across sales and marketing, all of its teams — including its service functions — can align to achieve the common goal of delighted customers who happily promote them to others.

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Chapter One: Identify your target buyers

You might think you know the personas behind the leads that close. But how much of this is based on assumptions and how much is based on actual research into your customer data?

To generate leads that close, organisations need to start conversations with their target buyers. But how much do they really know about the people they're trying to reach and engage? For some businesses, these are just numbers on a sales report.

Only by understanding their prospects' motives will companies be able to target their approach to resonate with today's time-sensitive buyers. Everything starts with the customer. The most effective way of achieving this is to create buyer personas.

Why buyer personas matter

Persona 1 is an IT manager for an academy. You establish they are interested in football, are between the ages of 30–45, and have two children. In their spare time, they like gaming, fishing, and hard metal music. They don't use Twitter but occasionally browse LinkedIn, they take part in several open community forums, and they regularly read certain publications and blogs.

This is a (very short, very top-level) buyer persona. It's a semi-fictional account of a target buyer and it plays a crucial role in educating marketing, sales, and service teams about the kinds of people they're speaking with and servicing.

How much could this profile inform the content that the marketing team is creating in order to attract and engage new prospects? What could Creative learn, in terms of the imagery and design that will strike a chord with the brand's target buyers? Similarly, imagine how beneficial it is for salespeople to understand what's motivating the lead on the other end of the phone.

It's common for organisations to assume that they're the main character in their brand's stories, but this isn't true. The brand is the enabler, the Wise Man archetype, Rowling's sparkly eyed Dumbledore. It brings the knowledge, the expertise, the magic, yes. But the prospect, that IT manager or warehousing operative? He's the small boy trapped in the cupboard under the stairs, wishing for more.

It's normal for organisations to have multiple personas. Businesses rarely target one individual across their range of solutions. The more familiar they are with their personas, the better they can use them across their customer-facing teams. The more accurate the personas, the better equipped they will be to generate leads that close.

How to create a persona for your target buyer

1. Identify questions that will help you to understand your persona

Download the persona profile checklist. Inside, you'll find helpful questions to ask when researching your buyer persona.

Tailor the questions as necessary to match your industry and the language used in it.

For example, rather than asking 'Where do you go for information?', you could ask 'How do you research an expensive purchase?'

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2. Begin researching your buyer persona

Determine a method of accurately answering each of the questions identified in step 1. There are lots of ways you can approach this, including:

- interviewing current customers or prospects
- surveying your customers or prospects
- talking to your co-workers
- asking questions on social media

3. Use HubSpot or your existing CRM to review lead intelligence

Your existing database is a fount of insights. Browse through a sample range of your customers' contact records. Do the same for your marketing analytics, identifying your most viewed/popular blog articles, most visited webpages and most downloaded offers to identify relevant topics in which the persona is interested.

- What topics and types of content are your contacts gravitating towards?
- What are they most interested in on your website?
- What social media networks do they use?

What is HubSpot?

Today, HubSpot is widely recognised as the number one CRM for growing businesses. At the time of writing, comparison site G2 recognises it as the number one CRM in the market. It also offers a suite of supporting platforms, or 'Hubs', specialised towards Marketing, Sales, Service, CMS, and more.

Every Hub integrates seamlessly with the other, so that organisations investing in the full HubSpot growth suite gain an unparalleled level of visibility and control over their customer data. As you might imagine, the results can be transformative.

Don't miss: How We Helped VFE Unlock the Potential of HubSpot and Achieve £4.8m in Inbound Sales.

4. Compile the answers to your initial questions

Collect and analyse all the data you've collected to reveal relevant insights.

Highlight the trends and similarities in the types of responses people give. These trends or common responses will form the basis of your buyer persona.

5. Transform your notes into a complete persona

Draft the buyer persona based around the insights you've discovered. When detailing this character, consider also the following details:

- What are common job titles and demographics?
- What does their standard day look like?
- What are their challenges or pain points?
- Where do they go for information?
- What common objections do they have to your products or services?

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6. Add your buyer persona into HubSpot (or preferred CRM)

Choose an image and name for your persona. This will help bring them to life for you and your team. Being able to ask ‘would IT Manager Mark read this?’ will help you to see them as a person, not a contact, and help put relevant activities into perspective.

Add the high-level notes from your buyer persona story that you created in the above step. Add them to the internal fields labelled persona’s roles, goals, and challenges.

Create a form field option that answers the question of how the contact would describe him or herself on a form. By doing this, you are creating a drop-down form property option. Now your contacts can identify with a persona when they fill out a form, which will help you to deliver personalised content and effective segmentation.

7. Review and update your buyer persona

Every quarter, review your buyer persona story to make sure it’s still accurate.

Update or add any new, relevant details to make sure the buyer persona is still the best possible representation of the person you’re trying to reach and engage.

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Chapter Two: Understand the journey your buyers are taking

You've identified your target buyers, but if you want to generate leads that close, you need to understand what stage they are at in the buyer journey. How ready are they to buy?

If it's true that a buyer persona summarises the kind of person the organisation is trying to reach and engage, it's also true that all prospects go on a journey when making a purchasing decision. Where they are along that journey will make a big difference in terms of where you find them, how you reach them, and what you need to do or say to move them along their buying journey towards purchase.

The buyer's journey can be thought of as a simple framework that maps a prospect's progression through the research and decision process before making a purchase.

This section goes through each stage of the buyer's journey — awareness, consideration and decision — and sets out what you can do to keep your leads moving through that journey until they close into new customers.

The awareness stage

Marketing teams usually think that this stage means developing brand or company awareness. Salespeople tend to think it should be about developing awareness of a product and its features. Contrary to both, we strongly believe that the awareness stage means making your prospect more aware of their challenge or opportunity.

Think of it as the 'problem solving' stage.

Consider the start (I mean the very start) of your own thought process when you last invested in a product or solution. Initially, it's unlikely you were thinking about brands or products. More likely you were thinking about you (or your business) and a challenge or opportunity you were facing. To illustrate this using a B2B example, an IT manager might invest in a networking solution to help their organisation adapt to new/changing business demands (and make their working life easier).

The awareness stage focuses on helping the prospect to understand the problem they're facing. This means framing it and showing the prospect you understand their pain. Try to get them to think about the problem and ask themselves questions like:

- Does this problem have a name?
- How long will it last for?
- Where does it come from/why am I experiencing it?

By considering the answers to some of these questions, your prospect is able to better process and deal with the challenge at hand. You're showing the prospect that you understand what they're going through. By the time the prospect has read X articles published by your organisation on the subject, a relationship is forming.

In our industry, example awareness subjects might look like:

- Why can't I generate leads?
- What is inbound marketing?
- X challenges facing marketers today
- The importance of inbound marketing in a post-pandemic world
- X best digital marketing platforms for inbound marketing
- How to unlock the potential of HubSpot

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As you help the prospect to understand their problem, you will begin building trust with them. Equipped with a new understanding, there's a good chance that they will then turn to you (or your content) with the question "now what?" This presents you with the opportunity to shift their thinking towards ways of dealing with the problem.

This is when the prospect enters the next stage of the buyer's journey: consideration.

The consideration stage

In our experience, there are two parts to the consideration stage: 'DIY' and 'ask for help'.

1. DIY

It's common for prospects to try and figure out if they can solve their challenge by themselves first. They will almost always prefer to solve problems in-house using existing resources. However, it's likely that (in relation to your service offering) they don't have the skills, time, or resources to successfully achieve this.

To get around this, you need to help the prospect understand the enormity of the task ahead of them. Build a picture of exactly what is required of them to be successful in their endeavours. Spell out that to achieve the task successfully, they need a comprehensive range of skills and resources.

When they realise they don't have these resources at their disposal, then logically they will have to ask for help from someone else.

2. Ask for help

This part of the consideration stage is about helping the prospect to understand how a new product investment or third-party service provider can help them to solve their problem.

It's easy for organisations to leap in headfirst here with articles and case studies positioning themselves as the solution, but this is jumping the gun. Remember, the prospect is just starting to consider how an agency/service provider/product might help them to solve their problem. What content can you create to demystify this?

In our industry, example consideration subjects might look like:

- An article on the costs of using a HubSpot solutions partner vs migrating to HubSpot themselves might help the reader to understand the potential ROI to be gained from leveraging expert help in this area.
- A checklist of qualifying questions to ask a potential HubSpot solutions provider will give the reader the resource they need to feel more confident about choosing the right partner.
- A listicle article along the lines of 'three ways our HubSpot support package could help you to improve your operations/reduce costs' might help to express the value to be unlocked by engaging BabelQuest for our services.

The decision stage

The prospect now knows they want to buy that product or commit to third-party services in order to solve their problem. There are two parts to this stage:

1. Giving advice

To give good advice about what the prospect should actually do, ask them a range of questions to properly understand their specific circumstances. What's on their mind?

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What's their main challenge? In other words, 'where does it hurt the most?'

The objective is to help the buyer feel that you understand what it's like to be them.

You won't achieve that if you just give them your company's standard elevator pitch, because you'll be missing the chance to maximise your relevance to them. By asking questions, you'll build trust and credibility, and they'll better believe in your advice.

2. Providing options

Decision-level content is the stage at which you can finally start to create content focused solely on your market offerings. This might look like articles focusing on YOUR specific products, articles communicating the value of YOUR services, or case studies demonstrating the impact of your services in action, for example.

If the prospect is thinking 'what should I buy?' and an organisation's content presents them with a single option of 'buy this', then it's presenting them with a binary choice between yes and no. In this instance, a buyer will usually veer towards no, because as humans our natural tendency is to be risk averse.

If the content can position three options to them (two options of yes and one of no), then it immediately increases engagement by reducing the possibility of a 'no' right down to about 30%.

Creating options in this way also puts the power back in the buyer's hands. This means you can say something along the lines of 'ultimately it's your choice'.

Providing your prospect with a choice really is vital. You could spend a great deal of time preparing the world's best solution for them, understand their situation really well, and set a price to match their budget, but if you don't give them a choice at the end they could easily say "we're going to get another two quotes".

In our industry, example decision subjects might look like:

- BabelQuest Onboarding services sheet
- BabelQuest pricing guide
- What makes BabelQuest different from the 5,999 other HubSpot solutions partners

Providing value to your prospects

In today's connected world, successful sales and marketing ultimately comes down to the simple approach of helping someone who has a need.

The beauty of the buyer's journey is that it allows you to do that really well. Through a series of well-planned content and marketing, you can enable the prospect to identify their issue or opportunity and work through the process of resolving it.

Many companies fall into the trap of writing almost exclusively about themselves: what they offer, what they cost, their methodologies, product updates and company announcements. This content has its place and will be of interest to some buyers but it misses out on huge swathes of the market who are earlier in their buying journey.

When you combine this with a deep understanding of who that prospect is, you create a process during which the lead never actually feels 'sold to', and is therefore much more likely to want to start a conversation.

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Chapter Three: Define your core value proposition

An inability to communicate what your business does and where it sits in the market could be limiting your ability to generate leads that close.

Digital is a crowded room full of noise. All your prospects are here, and you want to join in the conversation — but how to introduce yourself and what to say?

A technology reseller sidles up to chat about software solutions. Everyone nods, smiles, pops olives like Tic Tacs, fiddles with their empties, but nobody's listening. His competitors have been touting the exact same pitch all evening.

Outside, a group forms around a well-known enterprise. He draws a crowd but the conversation dries. His proposition is outdated. No one can see the value in what he says he does anymore.

Near the bar, an SME excitedly relates the story around her rapid growth. She's engaging, magnetic, so passionate her bubbly's almost flat (the waiter's hovering), but for all her success, she's having trouble explaining how she got there.

In each scenario, these businesses find themselves faced with one of two key challenges:

1. They don't know how to define their value.
2. They don't know how to communicate it in a way that's aligned with their target buyers.

Like many organisations, it's a problem they don't even realise they have, and it's all too common today when the pressure's on to take products to market and start promotions without having thought about the real value behind what's being delivered.

To navigate this challenge, we always work with our clients to develop a messaging framework. Defining this framework enables them to create compelling, relevant messages that run through every piece of communication about their business.

This framework builds on their knowledge of their buyer personas and is made up of three key areas:

1. Value proposition

This is your promise of the value you will deliver. It's the primary reason why a prospect should buy from you.

Example:

*As a globally recognised HubSpot Solutions Partner, **we work with** B2B organisations to unlock the potential of their marketing, sales and services software.*

***We do this by** asking the difficult questions other Solutions Partners won't, challenging you to be the best you can be, and striving to make an impact through everything we do.*

***We make this happen because** we're passionate about enabling organisations large and small to achieve their objectives and grow better.*

Read about how to create a unique value proposition for your organisation.

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2. Positioning statements

This is how your offer fulfils your prospects' needs, in a way your competitors' offers don't.

Example:

We'll help you with the strategy, activity, and technology needed across your marketing and sales activity to enable you to drive business growth.

For strategy, we'll help you refine your sales and marketing process so you can find, engage, and keep customers in line with your business growth goals.

For activity, we'll help you fill the gaps in the resources you need to deliver the workload and results to support your strategy.

For technology, we use HubSpot and the tools that integrate with it, because it enables us to make rapid iterative improvements to your marketing and sales processes and helps you make decisions that drive your growth.

3. Power statements

This is how you connect your offer to the emotional drivers behind your personas' stated needs.

Example:

*When I talk to [target persona], I often find that they are [aiming for *this*, but find *that* challenging]*

Promote a proposition your prospects recognise

We're getting underneath the messaging here, looking at the values and propositions at the core of your business. These are what you use to inform your messaging.

Most prospects visiting your website for the first time won't know anything about you. You need to make it as easy as possible for them to work out who you are, what you do and how you're different from others. That can be achieved partly through the way you position yourselves and partly through the way that you communicate this.

For example, don't contradict yourself. Unless they're subject matter experts, a prospect can quickly become confused. They won't be sure what you do if you describe yourself variously as foresters, arborists, woodland managers and loggers.

Bear in mind that people tend to skim through web content; they don't read every single word but look for the information that's relevant to them. In other words, they won't even read everything you say, so the sections they do read had better communicate exactly who you are — and how you can help.

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Chapter Four: Maintain consistent messaging

The importance of consistent messaging across channels can't be overstated, giving prospects a clear picture of who you are and why you're relevant to them.

First impressions count.

In today's world, an organisation's content is often the first touchpoint for prospects and new customers. People who've yet to do business with a company form their perceptions about it by reading their articles, browsing their website, and accessing their resources. Their first impressions come from the company's online presence.

No one ever willingly bought something from someone they didn't trust. Most organisations already recognise the importance of building trust by showcasing their satisfied clients, making their website smart and contemporary, and by providing valuable content that communicates and establishes their credibility.

> **"In a time of so much uncertainty, when daily decisions about personal safety and financial wellbeing are made, most consumers are reaching for brands they trust. It may provide comfort to reach for something familiar, and it's one less decision to make."**
> 'Why are consumers returning to name brands?', Deloitte

But all of that good work can be undone if what they say isn't uniform. Now that they've defined their buyer personas and clarified their value proposition, they're in a strong position to bring these things together in a communications strategy that bridges who they are and who they want to be starting conversations with.

Getting your messaging right just became a much bigger priority.

Consistent messaging helps prospects remember who you are

We're all familiar with slogans. Hear something repeated often enough and you start to associate those words with whoever spoke them. The same principles also apply to your key messages. Keep them limited, keep them simple, and keep saying them.

Want to encourage customer satisfaction? Repeat positive language and imagery that helps your prospects feel better about themselves before they've even bought from you.

If your messaging is inconsistent, it could be a symptom that you haven't properly identified who you are — or communicated this clearly across all levels of the business. Go back one square to 'Define your core value proposition'.

Talk your prospects' language

Consistent messaging also applies to the way that you write: the tone, style, and voice of your written content. Think about the way you speak to different people.

Are your articles chatty or strictly professional? Do you reference popular culture or draw on the credibility of well-established experts? How silent is your business? A consistent tone of voice helps make content recognisable, regardless of medium.

This is where a communications strategy comes in.

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Create a communications strategy

A communications strategy is designed to help you communicate effectively across all forms and channels in order to meet core organisational objectives. It covers everything from tone of voice and language preferences to your value proposition and the key messages (your power statements) for each of your buyer personas.

Creating a clear communications strategy for your organisation to follow is the most effective way of defining what language and types of words are suitable and documenting written examples. The 'strategy' doesn't need to be complicated and long for it to be useful. As a start, we recommend that it contains just three sections: a definition of your voice, a brand dictionary, and a range of objective examples.

1. Define your voice

The way we speak says a lot about us. With today's consumers demanding authenticity and transparency, your voice needs to be true to your brand, but it also needs to be accessible to your audience. Step one when creating your tone of voice guidelines is defining a voice that meets those criteria. This exercise should help:

Brand voice exercise

Imagine your brand is a person at a dinner party. You're sitting around the table with your business partners and competitors. It's Friday after a long week and the conversation's in full swing. You know the scene, but can you place your brand at the table?

Think about the typical characters you might expect to see: the outspoken authority leading the discussion, the reserved intellectual contributing insightful remarks, the comedian of the group bringing everyone to laughter with wit and pizzazz.

- What are they wearing?
- How long did they spend getting ready?
- Are they drinking white? Red? A line of tequila shots at the bar?
- Of all these people, who are your customers most likely to get on with?

Thinking of your brand as a person instead of a business entity is an effective way of bringing it to life and helping to imagine its voice. If possible, engage as much of the senior team as you can to ensure the tone of voice is both accurate and 'approved' across senior management/the board. Irregularities in voice are glaring. Everyone needs to be speaking in the same voice, after all.

If you're struggling to agree on which person your brand is, try starting with your competitors. It might be that everyone in the room imagines your brand differently but no one's in doubt that X company, against which you've been competing for many years, is the high-brow, holier-than-thou know-it-all at the head of the table.

2. A brand dictionary

The brand dictionary is a collection of words and other directives your team should use across their content because they evoke the right feeling and characterise the way you want people to think about your brand or company.

- Start by defining the style of language. Is it for everyman or for experts? Is it evocative or straightforward? Contemporary or classic? Pay close attention to your target audience and who it is you want to be starting conversations with.
- Then spend some time listing out sample words that fit those styles. For example, a word bank for a sunglasses brand might include words like 'chic', 'incognito', 'protection', 'celebrity' and 'summer', while for a company making racing bicycles it might include words like 'exhilarating', 'flying', 'rush', 'escape' and 'alive'.

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- The word bank should also set out preferred usage for the most important vocabulary and phrases associated with your brand, for example, whether you want your communications to use ‘our employees’ or ‘our people’, ‘bicycle’ or ‘bike’, ‘premium’ or ‘luxury’.

Every industry and company has its own jargon, and this section of the guide should explain that jargon so that you can be sure your readers always understand. While you may well be an expert in your field, it’s likely that not all of your buyer personas are. Unexplained acronyms can be particularly frustrating for readers of all abilities.

Speaking in the first, second, or third person

Will your content be written in the first, second, or third person?

- **First person** — ‘I think’ or ‘I thought’. This more personal, intimate voice is effective at communicating the author’s authority and establishing a connection with the reader in blog articles and video marketing.
- **Second person** — ‘you think’ or ‘you thought’. Good for showing you really understand your buyer personas and their pain points and goals. Helpful for addressing the reader directly within a piece of content.
- **Third person** — ‘he/she/they think’ or ‘he/she/they thought’. This can often be a good choice for case studies and is a hallmark of more formal writing with a less personal (or even impersonal) tone.

You might change ‘person’ for different forms, aiming to strike a more colloquial tone across your blog articles with the second person compared to a more formal white paper or report written in the third person, for example. Equally, you might change your use of voice within a piece of content. What could that look like?

Raising your voice

A brand with a formal tone of voice, targeting senior executives within a highly regulated sector, might feel it is necessary to write articles in the third-person, in keeping with the wider industry and the expectations of their intended audience. (“Organisations across the UK will recognise the benefits of…”)

They might switch to the second person when creating calls to action, however, to speak directly to the reader and increase click-through/conversion rates. (“To find out how your organisation could benefit, …)

The formal tone of the overarching piece is maintained, and the content is instantly recognisable as an authoritative piece of editorial at home amongst the larger body of communications put forward by the industry, but the writer has ensured that their copy speaks directly to the reader when appropriate to drive the best results.

3. Tone of voice examples

This part of the guide is especially useful if — as is often the case — more than one person is responsible for creating the content at your company.

List out some sentences or phrases that really encapsulate the style of writing you want and pair these with ‘off-brand’ versions which highlight the differences between what is and what isn’t ‘right’.

Both types of examples will help other writers to understand what’s appropriate. Examples are much more useful than descriptions of ‘brand personality’, which can be rather generic. Traits are subjective, so your idea of ‘confident and warm’ might be quite different from mine.

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Is the communications strategy being used?

It's one thing to create an effective, easy-to-follow communications strategy. It's another to make sure everyone in the organisation is working from it.

One of the biggest hurdles companies large and small face is keeping the strategy front of mind. This means making it as accessible as possible to different teams across the company.

It also means keeping the strategy updated regularly, so it reflects the current version of the company and its communications.

1. Vocalise the importance of the guide to new starters during their onboarding
2. Make the guide easily accessible on a shared drive
3. Frequently monitor the guide's usage
4. If you notice the guide isn't being used or followed, ask why!

Messaging is important because in order to reach and engage the reader, it's best to communicate with them using the kind of language that they're comfortable with and will respond to. They need to trust you.

Remember, the more you build trust, the more likely your leads will buy into your products and services, and the more likely they are to close later down the line.

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Chapter Five: Create a plan around your core activity

A predictable, long-term, repeatable strategy depends on your ability to complete core sales and marketing activities each month.

The ability to generate a predictable, repeatable stream of leads that close requires the consistent delivery of marketing activity outside of standalone campaigns.

Imagine you're building a house; without solid foundations, anything you put together will fall down pretty fast. Set those foundations in place, however, and you have the groundwork on which to build towering feats of inbound marketing architecture.

By now you've recognised the necessity for a customer-centric approach, and with your buyer personas in tow, you know which leads will close. But how many of these insights are actually reflected in your sales and marketing activities? Can you confidently say you're delivering a steady output of effective core activity each month?

What is core activity?

The process of reaching, engaging with, and nurturing a prospect can be broken down neatly into core marketing and sales activities. As such, organisations should dedicate a set amount of time and resources towards their completion each month.

Core activity forms the foundation of all marketing and sales processes. By sharing these responsibilities across the organisation, today's marketing and sales leaders can be sure that no step is missed. A clear growth strategy outlines how they'll achieve their goals. Better yet, by delegating activity to the teams best placed to implement them, they're ensuring that every task is carried out by the right experts.

Most importantly, they know that their marketing and sales activities are getting the time and attention they need every month to actually deliver the desired results.

Core marketing activity breakdown

Content creation

Quality is the name of the game and this takes time. It's not good enough to churn out average content and expect it to deliver. As online competition grows, even good content will struggle to rank. Set aside enough time to properly research, create, edit, and publish engaging articles, infographics, and video content that actually delivers.

Performance management

Performance management is an iterative process. You might not spend long optimising a landing page for mobile, for example, but you could expect to be doing this frequently based on what your data is telling you about the way your visitors are interacting with the page.

Content distribution

Your content isn't going to go anywhere if you don't distribute it intelligently. The key here is intelligently; it doesn't take long to schedule social posts or broadcast emails, especially with HubSpot's automated scheduling capabilities, but timing, relevancy, and consideration for each platform's audience are everything.

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Content promotion

As above, but promotion is paid. Paid advertising requires a detailed understanding of your target audience and how to reach them. If your buyer personas don't already go into these kinds of details, conduct further research into where they're spending their time online and how they engage with different platforms. Failing to put in the hours usually leads to poor results, wasted budget, and can damage board-level confidence in Marketing's capabilities as a result of negative ROI.

Website, SEO and keyword research

Keyword research can be time-heavy, even if it doesn't take long for an expert to implement their recommendations on-page. Optimising your website technically shouldn't be brushed to the side; your website's health will directly impact the success of all your digital marketing activity and every campaign it touches.

Conversion paths and optimisation

To maximise conversions from traffic, you're going to need to take the time to set up and optimise the relevant lead flows and forms. Don't forget to test your iterations. Rushing this could lead to mistakes that interrupt lead flows and limit conversions.

Automation and lead scoring

Automation will save hours in the long run but it needs setting up correctly first. Because it's left to run on its own, any mistakes can go unnoticed. Whether you want a simple three-step sequence or a complex nurture sequence, it's important to allocate time to properly implement this vital sales and marketing alignment stage.

Defining your core activity

You might be concerned that you can't find the time across your team to dedicate to all of the above activities. Equally, some core marketing tasks might sit outside your team's skill set or experience. Remember: there's a whole world of consultants, agencies, and subject matter experts out there who can step in and close this gap.

It's time to think about core marketing activity in the context of your own business:

1. Consider which activities your business is currently engaging in and which are missing.
2. Are there activities you're struggling to manage in-house?
3. Does your team need training or upskilling in any particular areas to be able to deliver on the plan?
4. Which core marketing activities can your team confidently deliver?
5. Crucially, how long do you currently spend on what we would consider core marketing activities, and what is your internal marketing capacity?

Whether you go it alone or are willing and able to seek expert support, it's important to define who's best placed to take on each task and how long they should spend on it. With accountability clearly set from the beginning, you can then begin working to deliver the core marketing activity that will elevate you above and beyond your online competition, connect with your buyer personas, and spark meaningful conversations in the form of leads that your organisation can close into new business.

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Starting conversations

The way we see it, the most successful businesses are the ones having meaningful conversations with their clients.

Such exchanges show that an organisation understands who its clients are and what they need. They build trust and foster familiarity. Through the practice of engaging in meaningful conversations with the right people, businesses build the relationships they need to grow.

But it's noisy out there, and attracting and connecting with an audience is more challenging than ever. To succeed in generating leads that close, businesses need content — written or recorded — that speaks to its prospects directly.

Of all the elements that make up an inbound marketing strategy, content is the glue holding everything together. After all, not only will content attract and convert new prospects, it can assist the sales team in closing them. Let's not forget how organisations then delight those customers with valuable content about using and making the most of their offerings to turn them into referrers and repeat buyers.

But with 7.5 million new blog posts reportedly published online every day across all platforms, not to speak of all the video content uploaded across social media every second, generic content just isn't going to cut it. Even good content is going to struggle. How can brands stand out from the crowd and speak to their target buyers?

This is where a content strategy comes in. A content strategy is the 'how', detailing the research, creation, distribution, promotion, and management methods of a content plan. A strong content strategy will help the organisation produce content that attracts, converts, and closes new customers. It will focus on its customers' key goals and challenges and how to use a variety of forms of content — written assets, infographics, and video — to reach them across platforms and address their needs.

Better yet, the insights provided by a content strategy will help with evaluating the effectiveness of website copy as a whole. Can you confidently say you've really explained what your business does? Do you have enough supporting information available (and accessible) that a new site visitor can understand what you do, how you can help them, and why they should choose you over your competition?

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Chapter Six: Write on the topics your buyers care about

To generate leads that close you need an interconnected web of detailed and informative content on the topics your buyers are searching for.

The content on your website can (and should!) be used to help support your visitors throughout their buyer's journey. This means it's incredibly important to make sure the user journey is optimised as much as possible by ensuring that your website is easy to navigate and that information can be found quickly.

If attracting more traffic to your website is a goal, you'll also need an SEO strategy to make sure you create content that will appear in search results. To help it distinguish between websites that are a real authority in their subject matter, Google favours topic-based content. This refers to websites that write at breadth as well as depth across a subject or topic. So how can you ensure that your content complies?

Google is no longer looking at exact keywords but topic clusters. Linking the content together shows the search engine you have authority on a topic. Over time, you should rank higher and higher for the topic it covers. It effectively weaves your content together and creates a site architecture that's easy to crawl.

When it comes to this strategy, you'll end up dedicating a lot of your time to creating, distributing, and promoting content to your audiences, but if you're looking to increase the number of leads that close and you don't already have expansive clusters of themed, credible content, this is exactly what you need to be doing.

Introducing topic clusters

Topics of this kind are typically formed of pillar pages and cluster content (or subtopics, as we like to call them) — long-tail keywords directly relating to the main topic. HubSpot calls these topic clusters and the aim is to create a content strategy that answers questions on a wide range of closely related keywords and search terms, as opposed to standalone keywords associated with standalone content. As you can imagine, detailed planning plays a big part in successfully achieving this.

Pillar pages are web pages that are designed to give the reader a comprehensive overview of each of the subtopics surrounding the main topic. They should have a clear conversion point, guiding visitors in the right direction towards becoming a lead.

Subtopics are explored across dedicated articles, each going in-depth into one subtopic from the pillar page. For example, a pillar page about 'inbound marketing' might link to subtopics about 'marketing automation' and 'inbound marketing costs'.

By linking all your relevant content (articles, web pages, landing pages etc.) to and from the pillar page, you're showing Google that you know what you're talking about and that you do this better than anyone else. Google will reward you with authority for that topic. A well-connected website is much easier for search engines (and human visitors!) to crawl, which will also help to boost your search rankings.

But we're not writing content for search engines anymore. Instead, we're creating content that helps to educate our audiences and help prospective customers find us. When prospects research a purchase online, they want to find answers to their questions easily, and they want to find them fast. Imagine how helpful your visitors would find it if the content they discovered on your website not only answered their original question but all the follow-up questions that usually come to mind, too?

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Most research into a subject throws up more questions than it answers. If an organisation's content doesn't link to other resources on the website to help them answer those, too, they will inevitably bounce to Google to find them elsewhere.

This doesn't just benefit the visitor. Encouraging traffic to spend time navigating the links on the website shows Google that this website is providing visitors with lots of interesting, engaging, valuable content. It ranks them higher in search accordingly.

That's exactly what topic clusters do.

How to get started with building out topic clusters for your business

By now you might be wondering how you can get started with building out topic clusters for your business. Don't worry, we've got you covered:

1. Identify your main topics

Naturally these should align with what you do or what you sell. For example, ours include:

- Inbound marketing strategy
- CRM configuration
- Sales enablement tactics
- HubSpot integrations

2. Think about all the different areas that come under these pillar topics

There's likely to be some overlap between topics, and that's fine. It will actually help to boost your rankings in search engines over time.

3. Conduct keyword research

This is important. Keywords are what will 'cluster' your subtopics together. Take the time to find out what your prospective customers are actually searching for. This will also help you to uncover additional content ideas that you can add into your topic clusters.

4. Create a three-month content plan

In our experience, quarterly plans are a suitable time frame in which to explore a topic at length while still being able to write on up to four different topics a year. (If you're blogging multiple times a week, or you have the resources to write and publish at that volume in the future, you may be able to get through more topics in the same amount of time. This will largely depend on your team's capacity.)

Start by writing your pillar pages first, then make a start on each of your subtopic articles, infographics, and videos. Starting with a pillar page is generally a good idea because it will help you to identify which related articles to write to support it.

5. Review, measure and iterate

Make sure that you're regularly reviewing your content for relevance, making changes to it so that it stays up to date and visible in the eyes of the search engines.

Written content is usually easy and quick to update, if you keep on top of it. Infographics and video can require more time and resources, so plan these carefully.

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Better nurture leads to close with informative hubs

Changing your marketing focus from ad-hoc keyword research to broad topic areas will be incredibly beneficial for any organisation's online presence. Not only will it become easier for people to find you, but you'll also be able to give your site visitors more reason to stay instead of heading back to Google to find more answers.

We appreciate that it can be a daunting task to put together a plan for the next three months, but if you're serious about wanting to generate leads that close, stick at it. Having an effective content strategy is crucial for getting to that lucrative first position in search engine results pages and ultimately for growing your business.

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Chapter Seven: Workshop ideas with the wider business

To generate leads that close, you need standout content. Navigate this challenge by leveraging ideas, inspiration, and expertise from across the business.

Getting buy-in for content and inbound marketing is often a challenge. By encouraging different teams, departments, and business units to brainstorm and share new content ideas, you involve them in the creation process from day one.

Leveraging these departments will allow you to be transparent about your business in the content you produce, demonstrating authority and helping you to build trust. If you can answer a prospect's concerns about your products or services in a clear and impactful way before they have even connected with a member of your sales team, it's much more likely that they'll become a lead that closes.

These are the questions we are most frequently asked when preparing for a content workshop with a client, as well as tips for putting together your own successful workshop and ensuring that you come away with lots of great ideas.

How long does a content workshop take?

In our experience, a content workshop can usually be completed in half a day. The challenge is usually in finding a time slot that suits all the required attendees.

We typically request that the managing director or head of the company attends, as well as any department heads/relevant board members. As content usually falls under Marketing's remit, the head of marketing should be an active voice in the session. He or she may also want a senior member of the marketing team/any copywriters or content creators on staff to join, too. Schedule enough time to run through everything and answer any questions your colleagues may have.

What do you need to run the workshop?

For a workshop to be successful you'll need to have a clear idea of what you want to cover, so it helps to create a presentation to keep you on track. At minimum, include:

- an explanation of how buying power has now shifted from brand to prospect
- an introduction to the inbound methodology
- a short explanation of how Google and other search engines work
- a brief overview of the buyer's journey with examples of content for each stage
- a list of the benefits for both the business and the staff
- an overview of what you hope to achieve from the session
- your SMART goals

On the day, you'll need to have:

- a laptop and projector screen
- separate areas for small teams to work (if relevant)
- a whiteboard or flipchart and different coloured markers to write down ideas

In our experience, running a workshop over the lunch period is a great way to get the team together. Order in some pizza or ask your colleagues to contribute to a buffet as this will help to get people engaged and excited about your workshop.

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Note: *We have also successfully conducted workshops remotely in line with social distancing directives and other work-from-home guidance. In our experience, remote workshops are just as effective as in-person sessions. If you're considering running a remote content workshop, practice a run-through with select colleagues first and consider ways of 'breaking the ice' to stimulate conversation and involvement. As best practice, insist that cameras are turned on.*

What outcomes will a content workshop deliver?

This depends on what you're looking to achieve. If you're simply looking for a way to get questions and ideas out of your colleagues, a content workshop can be highly effective in delivering these, but there's much more you can also get out of them.

During the session, encourage your colleagues to put themselves in your buyer's shoes. What would IT Manager Mark be likely to search for on Google when faced with a problem at work? Which social media sites will he turn to when looking for advice from his network? Would he rather read a blog article or watch a LinkedIn video? By considering these details, as well as pulling out common pain points, you'll be better positioned to reach the persona wherever they are on their buyer's journey.

Ask everyone to create a list of all the questions typically asked of your products and services. Every single one of these is a potential article or video subject and will help you and your team to think from the perspective of the buyer or user.

Your thought leaders are just one source of awesome stories. Discover more ways to create better blog content.

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Chapter Eight: Capture the reader's attention with storytelling

Stories excite us in ways that facts and statistics can't and that's incredibly powerful, especially when you've got your content cap on.

I want you to think back to the last time you heard a story. I'm willing to bet it was today.

We hear them on the radio when driving to work in the morning; we tell them at the office first thing on a Monday; we read them in the papers or on our phones at lunch; we watch them in the evening when we crash on the sofa. They're on the backs of cereal packets and the front of billboards, they're under our beds at night and in our sleeping heads.

Stories are how people make sense of themselves and the world around them, giving context and meaning to information that would otherwise be forgotten hours, minutes, or seconds later. They can be told across a variety of forms, from articles and case stories to engaging videos. Most importantly, they appeal to our emotions, and for this reason if nothing else they belong in all areas of marketing.

So where can you find stories, and how can you weave them into your content?

Getting story ideas

It can be frustrating trying to find inspiration for new written or visual content. One solution, in our experience, can be finding ways to leverage the insights of the sales team. Whether you end up speaking to salespeople individually or in a group meeting, here's how you can collect their thoughts and ideas, quickly and effectively.

1. Ask them what content they want

Few sales teams make full use of Marketing's content. They might be struggling to fit it into their introductory and follow-up emails or they might not be aware of it at all.

Run through the content already available to them on the company blog and via any downloadable resources/videos already created.

- Is it helpful?
- Is anything missing?
- Is there a subject, angle, or resource in particular that could really help them close a live deal faster?

Put yourself in the position where you're helping them to do their job better.

I can guarantee there will have been times when a salesperson has said "I wish I had X, Y or Z to send to this prospect", so ask them to share these insights with you.

2. Ask them to share customer and prospect questions

A salesperson's inbox is usually a goldmine for content ideas. Ask them to bcc you into relevant emails so you have a constant stream of ideas for blog titles. This is also a great way to find out which questions keep coming up. When you find one, create an article to answer it and invite the sales team to link it from their emails.

It's likely that there are a range of different ways sales questions can be answered, so add to and improve your article based on Sales' feedback. They'll be able to see the benefits as soon as they start using the article in their conversations.

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Of course, there's every chance they might not be comfortable sharing their emails with you. An alternative is to ask them to send you a list of all the questions they were asked that day, week or month to keep your content relevant and helpful.

3. Schedule meetings for sales and marketing alignment

If both the sales and marketing teams are able to schedule a meeting once a week (or even once a month) to discuss deals and content ideas, it will help to keep everyone up to date and provide another opportunity to surface new content ideas.

Sales and marketing alignment meetings are also a great place for both teams to discuss:

- the efficiency of the sales process
- lead scoring and sales qualification
- mapping your existing content to the different stages of the buyer's journey
- how well specific pieces of content are performing
- if any improvements can be made

Sales and marketing teams should aim to be in constant communication with each other. That way, you can always ensure you're all working together towards the same goal.

From the HubSpot blog: How to Tell Your Brand Story Across Sales, Marketing and Services

Interview the experts

Whether you're interviewing Sales, the customer service team, or John from Product Development, it helps to be able to get the right information you're looking for. Along the way, you'll often uncover much more than simple sales or support queries.

Some tips for when you assume the journalist position:

- **Who are the experts?** The movers, the shakers, the product makers? (John, that means you.) Experience often comes hand-in-hand with stories.
- **Confidence is key.** Don't be intimidated by seniority, although I appreciate that's easier said than done. Learn how to carry yourself in an interview.
- **Record, record, record!** Whether you're producing a full-scale video interview or you simply want to listen back to the audio later, consider how you're going to do this. *(Always ask permission before recording someone.)*

Everyone has stories. By taking the time to engage someone from further afield than Marketing, you're creating opportunities to listen for those stories. If you listen closely, and you have an ear for it, you might just hear something special.

How to tell a story

Storytelling isn't easy. We've all read a book or watched a film and been disappointed. If the story doesn't hook you in the first few minutes, you'll find your mind wandering. If it takes a turn that doesn't make sense, you'll feel confused. Inconsistencies in the narrative can take you out of the story and break the illusion.

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As a starting point, we recommend that you pay attention to four key areas when drafting a piece of narrative content:

1. Character

In the buyer persona chapter, I touched on marketers' tendencies to put their company or brand centre stage in their content. This is probably one of the biggest reasons why businesses new to content marketing struggle. Nobody wants to read a piece of content talking all about your brand. That's an advert.

To tell an engaging story, put your target buyer centre stage. This shouldn't be difficult, if you've been thorough with your buyer personas. You know them inside out. Make it as easy as possible for the reader to imagine themselves in your story.

2. Conflict

You have your character. But where's the conflict? What's the tension? What's happening to make the story interesting, surprising, or cautionary?

By building your personas' challenges into their stories, you're including references that you know your reader can relate to. Now they're not only imagining themselves in the story, they've invested in it. They feel the character's struggle and want to see it resolved.

3. Story arc

Stories have beginnings, middles, and ends. This is how we experience the world so this is how we expect stories to unfold. By building this arc clearly into your content, you provide a familiar framework that the reader understands and can follow.

You can use story arcs in more creative ways, too. Consider offering a gated resource, checklist, or some other download as the resolution to the story. If it's a logical next step in the story you're telling and the reader is invested, they're more likely to convert.

4. Keep it real

Reality is not something we always immediately associate with stories, but even fiction depends on it to engage the reader. If the representation of a character isn't convincing, for example, the experience is less immersive and the story's hold can break. If their emotions don't seem genuine, we don't relate.

In the context of narrative content, this comes back to trust. Root your content in something tangible and relevant to the buyer persona's situation, like a real-life case study, and the reader is more likely to engage with it. Use real-life details and examples to maintain authenticity.

It's important to take your reader on a journey, from the moment they arrive at your homepage right up until they decide to reach out to you for help. And increasingly, as old-hat SEO becomes less relevant and search engines become smarter, stories are your way of connecting with a prospect, of starting a meaningful conversation.

Related read: **Don't Tell Me Your Brand Is Shining; Show Me the Glint of Light on Broken Glass**

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Chapter Nine: Identify the content already generating leads that close

There's a strong chance your content is already generating leads that close. A content audit will highlight this, giving you visibility over your most valuable assets.

There will be some content in your business already. You may have created some articles, white papers, or case studies and that's only looking at the online content — what about the brochures and other print collateral being used by the sales team?

Doing a content audit will help you to:

1. get clear visibility of the content already in your business to understand what is missing, what should be binned and what could be repurposed
2. ultimately, save time and resources by not having to start from scratch

What content do you have already?

It's time to create an inventory of both your online and offline content.

First, create a spreadsheet to keep track of everything. We'll go through all of the columns you'll need throughout this article but start off with the name.

Secondly, make sure that you look in all areas of the business. Here are a few examples of the types of content you could find from the marketing and sales teams.

Marketing content

- Blogs posts
- White papers/ebooks/guides
- Checklists
- Case studies
- Videos
- Infographics
- Podcasts
- Newsletters
- Webinars

If you have a lot of customer testimonials, you might want to track these in a separate tab in your spreadsheet, noting where they're currently used. They will act as a really useful resource when your team is creating content in the future.

Sales content

- Brochures
- Proposals
- Presentations
- Price lists
- Product specifications

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Put the content into groups

Add columns to denote the format of the content. That might be an article, white paper, video, or infographic. The list goes on. My main advice would be to keep it consistent and simple, so that you can filter by type at a later stage.

Who and what is each piece of content for?

There are three areas in particular we are looking at during this stage:

1. Persona
2. Stage of the buyer's journey
3. Purpose

This is the part which will give you some really interesting insight into the content. It may be that it was created before you looked into personas and the buyer's journey, so don't worry if it straddles multiple categories. Make sure that it's all noted down.

Knowing the purpose of a piece of content is crucial. Even if it seems unnecessary to you, another person in the business could find it invaluable. Make sure you interview the people who actually use the content to understand how it's used.

Here are a few examples of what a purpose could be for a piece of content:

- To convert a website visitor into a lead.
- To demonstrate past results and expertise.
- To inform a prospect about a specific product in more depth.
- To get over a common objection during the sales process.

At this stage, you will also want to take note of where it's located. Is this something which only gets sent out directly to prospects by the sales team? Is it gated on your site or is it openly available for anyone to read?

How is it performing?

To understand the effectiveness of each piece of content, you need to see how it's performing. Doing that is really a two-stage process:

1. If it's an online piece of content, look at the right metric for its purpose. For example, if you have a gated guide, look at the conversion rate of its landing page. How well it is performing and do conversions drop on mobile? If your articles are aiming to raise brand awareness, look at the visit numbers (and potentially the conversions to subscribers). For video content, how many people are clicking 'play' and how many are watching it in its entirety?
2. Offline pieces of content will be harder to assess for performance (unless you're already using the HubSpot CRM documents tool, in which case you're already ahead of the game) so talk to the people using the content at the moment to get their perception of its value.

Don't miss: The Importance of Brand Awareness and Why More Companies Than Ever Are Prioritising It

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What next?

Now that you've discovered, categorised, and analysed your content, it's time to start working out what to do with it. Not everything will need to be kept, so aim to attach one of the following categories to each piece of content:

No change needed. This content is working well and doesn't need changing.

Delete. It could be poorly executed or it could be so old that it's no longer relevant.

Update. You see value in this piece of content but it needs optimising to update it. That could be adding some revised information or completing a quick copy edit.

Completely rewrite. The subject is still valuable but the content itself is not fit for purpose. If you need to make significant edits to an article, you can add an editor's note to the bottom to say it was originally published on X date but has been updated. That way, you've basically got a new piece of content and it's showing that you're keeping up to date with the times rather than churning out content for the sake of it.

Repurpose. You might have a previously published infographic that would also work well in article form. If you find a valuable piece of ungated content that's currently in a PDF, could turning it into an article help you to be found via organic search with a great conversion point? Repurposing is turning one content form into another.

Combine. Now you've got a clear view of your content, you might have identified five articles that could be combined into a guide and used for lead generation, for example. As you write more and more around clusters of related topics, the potential for related articles to be combined into a longer-form piece increases.

Break apart. The opposite is also true. That twenty-page white paper could be neatly broken down into a series of shorter articles and used to promote the larger content offer on your blog or via an email nurture sequence. Sometimes a piece of content just doesn't work because it's too much to absorb in one sitting or the story arc is too complex or the subject is too technical. Tackling it as shorter, more accessible or specific articles could be a fast, effective solution.

Remember, with so much content out there, yours needs to be high quality. Make sure that if something isn't hitting that mark, you mark it as 'needs work' or even consider getting rid of it. Articles that come in at 200 words and announce an award the organisation has recently won aren't articles at all. Maybe it's time to delete it and add a section to your site that displays the awards you have won instead. Better yet, support that page with an article highlighting what the award win means for your customers and how they benefit from your skills/experience/industry expertise.

Prioritise and make a plan

By this point you'll be looking at your spreadsheet and thinking one of two things.

1. "The spreadsheet is basically empty, we really have a long way to go."
2. 'So. Much. Content. Tom, why did you make us do this?!'

Either way, don't panic. If you haven't found very much then work with what you've got but also invest some time in finding out what content you need. You've probably made a great start at identifying those gaps by talking to others in the business.

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Wondering where to start?

If you have the opposite problem, remember that not everything can be done at once. This is especially when you remember that you'll also need to be planning and creating new content to fill the gaps that you've started to notice.

- What can be changed quickly to make a big impact? Go through your newly populated spreadsheet and work out which of your next steps will need the smallest effort to see the biggest results. Start there.
- Creating a content calendar to plan in your decided next steps with this old content, and to schedule pieces of new content can be a great way to draw everything together and make it seem more manageable.

You've now got all the steps you need to audit your content and make a plan of action for how to tackle each piece.

I know it can seem like a challenging task, particularly when some of that content might be hidden in the inbox of the sales department, but honestly, it will be well worth it when your content starts delivering leads that actually close.

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Chapter Ten: Define an editorial process

You're writing more like a publisher, but are you running like one? Defining and working to an editorial process is often a company's biggest content challenge.

The biggest content challenge often isn't the content production itself but the process of getting it reviewed, edited, uploaded and either scheduled or published in a timely and efficient way.

'Timely' and 'efficient' are not two words that come to this process naturally, especially during the early stages. Organisations are realising they need to start acting more like publishers in regards to the content they produce but forgetting that this comes with processes of its own that must be followed and adhered to if the content production stage is going to prove cost-effective and sustainable.

Fortunately, there are steps you can take to improve the way you manage the content side of your operations. When implemented correctly, an editorial process is the lubrication in the content marketing machine, ensuring the stories and videos you need to attract and close those leads are produced efficiently and consistently.

Creating a content calendar

In order to keep up with fast-paced publishing cycles, newspapers and magazines maintain an editorial calendar or a schedule of who is writing what — and when.

Using this editorial calendar, editors can know what's coming up well in advance, ensuring a smoother and more organised publishing process. Imagine how chaotic everything would be without it: a scramble for subject matter, editorial approval, missed deadlines, and late or poorly written articles. It's an editor's nightmare.

A clear, easy-to-use content calendar works in the same way. Here's how to create one.

1. Start with your end goal in mind

Whether this is driving blog subscriptions, capturing personal details, or something else besides, this is the point you and your team are working towards.

2. Align the goal with your buyer personas and the buyer's journey

This will provide indicators of the form in which you should be writing — articles, case studies, how-to guides, and so on — or whether or not you should be writing anything at all (do they respond better to video and infographics, for example?).

If your goal is lead capture, it will also reveal the kinds of resources you could test as hooks. Together, all these points will start to give you a comprehensive overview of the content that needs to be created, by whom, and when.

3. What topics are your buyer personas interested in (content they will value)

And how can you align these with your value propositions and company stories to create more engaging, personalised narrative content? This is an effective way of writing about the subjects your audience is interested in, in a distinctive way that will help to elevate your content above that of your competitors.

Note: *At this stage, it's important to be critical. It's easy to create a calendar that 'sounds right' or that you can imagine being effective. Cross-reference this against the personas. Better yet, put yourself in your personas' shoes. Would that article benefit you? Would you read it over the thousands of similar articles already online?*

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4. Don't forget to research suitable keywords to support your content

While it's arguably more important to create content that will engage your readers, offer them value, or encourage deeper thinking, keywords should be used where natural and appropriate to provide greater organic visibility and search relevancy to the content in your calendar.

5. Input all of this information into a calendar format

The calendar should be clearly set out and easy to access so that the team has no excuse not to work from it. Consider when the articles will need to be published, as well as the dates by which first drafts should be completed. Who will be responsible for creating the content? When will they need to be briefed? What form will the content be? Have you linked to any important resources, and does the calendar state the aim (how the content should help the reader) and objective (what you want the content to achieve) of each entry?

6. Implement

Once the calendar has received internal sign-off, you can begin to work through the pieces to the timeframes specified, drafting, editing and publishing your new content.

Read more about the importance of content calendars and how to create one.

The drafting, editing, and approval stage

This is an important stage in any content marketing process. Content should always be reviewed before going live. Even the most meticulous copywriters will make mistakes from time to time, and while editors are often described as being eagle-eyed, this is, in fact, just a metaphor. As a result, establishing an approval stage between content production and publication helps to maximise accuracy and maintain a healthy working relationship between all parties involved in the content.

To make this stage as efficient and painless as possible, we recommend:

1. defining the workflow

Establish who will be writing or creating content and who will be reviewing it. The more complex this gets, with multiple editors or multiple levels of approval, the more challenging the approval process becomes. When multiple parties begin editing a piece of work, feedback can get complicated and publication can be unduly delayed, with repercussions as far up as engagement metrics. In some cases, production can grind to a halt, limiting the company's ability to generate the leads it needs to grow.

2. working to a common goal

Make sure the person editing the content is familiar with the campaign and its goals. These factors will often influence the way a piece of content grows, so the closer the editor is with these elements, the fewer questions they should have with the content.

PART TWO: CONTENT

Chapter Eleven: Pressing play on video content

Discover all the different ways that brands today are improving their marketing performance, driving better results, and closing revenue through the use of video across the flywheel.

As a global community, we've all gone a little square-eyed.

Take the United States: between their favourite shows, the latest music videos, and the unique combination of channels and creators they increasingly follow in spaces like YouTube and Instagram, our American friends' video streaming consumption increased by 18% year on year in 2022, with a year-over-year increase from 143.2 billion streamed minutes to 169.4 billion between February 2021 and February 2022. And according to the report, that figure is only going to keep growing.

> **"Online video penetration is near universal in a number of leading online markets."**
> Statista

"We're hardwired to engage with stories", explains Michael Litt, CEO and founder of online video hosting company Vidyard, speaking at The Revenue Growth Summit in 2018. "As a result, 90 percent of customers say video helps them make buying decisions."

In the business world, this means a huge opportunity to not only reach more of your target buyers around the clock but engage with them in standout ways.

21 use cases for video inbound marketing

1. Stand out in social

Your prospects' news feeds have never been busier. For brands looking to reach new customers through social media, the challenge is to revise their social strategies and find new ways of catching their audience's attention.

This is where video excels: a video frame stands out from text-based updates nestled around it, drawing the eye. Where autoplay is enabled, the video's movement attracts further attention. If you've used subtitles, the viewer can watch the video whenever and wherever without sound.

Jump ahead to chapter twelve to learn all about social promotion.

2. Improve audience engagement

An article is faceless, but videos give brands the opportunity to put a face and a personality to the content they're producing. The written word can be copied and pasted or fabricated entirely, but we're more inclined to trust word of mouth, especially when it's given on camera. On social media, this can be used to better engage a viewer.

The same applies to videos embedded in written content, increasing each visitor's engagement and time on page as they sit back to watch and digest. See how we've used them across this article to emphasise certain points and to hopefully give you a clearer understanding of what we mean with each example.

PART TWO: CONTENT

3. Showcase your company's experts and thought leaders

Those people sitting in front of the camera putting their names, faces, and reputations under scrutiny? The more they know about your brand and the subject they're talking about, the better they'll represent you and the more impactful your videos will be.

In the same way that your team will be used to getting content ideas from the wider business, if you have thought leaders and industry experts, now is the time to unshackle them from the desk, lead them into the spotlight, and press record.

4. Reduce content production costs

Videos don't have to be 'produced'. Yes, you might want to invest more time and budget into a polished production for an awareness-level video marketing campaign. But a cost-effective video culture can be built on the back of smartphones and free apps.

Check out the GoVideo Chrome extension by Vidyard.

5. Improve content production speed

Another misconception is that video takes hours to shoot. You can literally record from your phone or browser, upload to your blog or social media, and start promoting in minutes. In fact, if content production is limiting your inbound marketing strategy, video can be an efficient way to scale up your operations.

6. Build relationships with prospects earlier

Putting together a proposal? Incorporating elements of video that the prospect takes back to their business and presents to the C-suite ensures the information they're presenting is accurate, reflective of what you are offering, and engaging. Oh, and you've given the decision-maker a chance to meet, recognise, and start forming a relationship with you before you've even started working together.

7. Promote a new product or service launch

It's not just rising competition that's making social and organic success harder. As Marketing Week reports, consumer trust in brands on social media is falling as "the line between marketing and non-commercial news and articles blurs". Consumers are losing faith in information that brands publish on social media as they become more conscious of the various tactics used by marketing teams to reach them.

A clearly marked product or service video shows you're being upfront and transparent about your sales and marketing content, which can only reflect well on your brand, while enabling you to discuss and promote your offering to your target audience in a visual, tactile, and ultimately persuasive manner.

8. Showcase a product demo

Perhaps you've recently revised your value proposition. Or maybe your product requires complicated assembly.

Whatever your reason for requiring a product demo, a marketing video removes the ambiguity and miscommunication inherent to step-by-step guides and written walkthroughs, providing your mass audience with a clear visual that they can use to get the most value from the product — and your brand.

PART TWO: CONTENT

9. More clearly explain dry, challenging, or lengthy processes

The same principle applies to more personalised sales communications. Whether you're providing an overview of a pricing package or a prospect is struggling with a technical task, record a quick video at your desk that walks them through the process and fire it over. Your prospect will appreciate the personalised response, never mind the value they get in having their question answered or problem solved.

10. Become a go-to resource

If you find yourself frequently creating product demos or personalised sales videos, consider collating them into a knowledge base on your website that helps address frequently asked questions from your prospects and customers. Imagine how much more engaging and shareable a video library could be compared to a traditional FAQ section.

11. Tell better stories

Brand storytelling takes many forms, from heavily produced video marketing around which whole campaigns can be built to shorter, snappier interviews with experts or customer case stories.

Whichever form you use, by paying attention to the main character (usually your customer), the tension between where they are and where they want to be, and the resolution (make it a good one!), you can tell truly engaging stories that stir viewers to action and leave a lasting impression.

12. Increase email click-through rate

"Personalising videos for your prospects and clients is the most powerful way to trigger a response", added Michael when we asked him about the possibility of using video to improve sales outreach response rates. If your nurture sequences are underperforming or your sales team's emails are falling on deaf ears, personalised videos could significantly impact the way people interact with your emails.

13. Improve sales and marketing alignment

The rivalry between sales and marketing teams is one of the biggest causes of friction in businesses we meet. Nine times out of ten, the problem can be traced back to communication or a lack thereof. Either the teams aren't listening to each other or they're singing from completely different hymn sheets, leading to a breakdown in meaning and a business flywheel that looks more like a hole in the ground.

To stop your leads falling into that hole, use video to improve communication between your sales and marketing teams. In the same way that video can be used to better explain a product, a process, or your brand to a prospect, interdepartmental videos can be used to speed up communication, reduce miscommunication, and build stronger relationships between your sales and marketing teams.

14. Close more deals

Let's take a look at that statistic again: "90 percent of customers say video helps them make buying decisions."

Video's awesome potential to boost your company's revenue growth speaks for itself. Does video feature in your existing deal strategy or could it be an opportunity for your sales team to find quick wins?

Check out how we delivered video as part of our sales enablement services to drive one of our clients 45x ROI in just six weeks.

PART TWO: CONTENT

15. Strengthen your existing customers' relationships

Today, customer satisfaction is your biggest opportunity to generate more business. Treat your customers well and they can become your strongest asset in the race to get business and grow better. Fail, and your competitors' ranks will quickly swell.

To refer back to earlier, the general perception of video as time-consuming, expensive, and plain difficult to do well is something that can be turned to your advantage when engaging with your existing database. Frequently producing videos of consistent quality is a great way to impress your customers and set yourself head and shoulders above your competition, never mind the relationship benefits that come from producing personalised videos and helpful knowledge bases.

16. Bring life to the office

Culture is key to retaining and growing your top talent. It's also important from a recruitment perspective. Hiring new staff is expensive and time-consuming, making it essential that you can create a culture your employees love being a part of. We celebrate our culture by taking videos around the office every day, whether we're running a baking competition, celebrating a client win (see below), or adding stories to our company Instagram.

17. Celebrate client wins

Many businesses in the B2B space have lengthy buying lifecycles to contend with. Even if you don't, it's always an exciting moment when you close a new customer — for you and your buyer. A quick, characterful video thanking the buyer for choosing to work with you or buy from you is a simple and meaningful way of expressing this.

18. Cover successful events

Events can be expensive to run, never mind the months of planning and sleepless nights. If you're fortunate enough to have a large turnout and a strong line-up of speakers, record it! This is a great example of how you can maximise the success of your events through content marketing: the footage makes for a great follow-up email thanking attendees for coming, you can use it on social media to improve your brand awareness, and it can also make for an engaging conversion point across your website. So much value!

We did exactly this when we held The Revenue Growth Summit in 2018. With over 100 attendees and a lineup of speakers from HubSpot, Vidyard, and more, the day was a real success, and a great deal of it was captured on video for future use.

19. Engage younger generations

"Younger people, not surprisingly, are embracing digital platforms and internet-connected devices much more quickly than older demographics," Tech Crunch notes in its commentary on Nielsen's report.

On the subject of Millennials and Generation Z, Vidyard's Michael added: 'They communicate in a very different way to how you or I are used to communicating. As it stands, we have to teach many of our employees born post-1995 how to use email. In the near future, email is going to look and feel like the fax machine does today.'

Getting used to working with video now will set you up well for the future because it's only going to get bigger.

PART TWO: CONTENT

20. Communicate company news

Let's face it: company updates don't have a great rep. Some companies consolidate them into the blog to make them appear more customer-facing, but they're still all about you. In the B2B space, they can often make for particularly dry reading. And they're rarely as interesting to the outside world as they are to your CFO. Turning the traditional PR post on its head and sticking a camera in front of it can be an effective way of adding much-needed character, gravitas, and human appeal.

21. Spin the flywheel and grow better

Many businesses still struggle to align their sales and marketing activities, never mind the customer service piece. But as connectivity grows and customers take more and more of the buying process into their own hands, it's increasingly important that all your business processes are working with each other towards the same goal.

Implementing video won't solve this problem overnight, but by improving communication both internally and externally, it can go a long way towards removing some of the friction holding back your business flywheel.

Creating a podcast

You may have already noticed but attention spans are only shortening across audiences which can be challenging. With content being so readily available everywhere, it is essential to encourage various content formats to stand out amongst the crowd. One of the most popular in recent years is podcasts.

The podcasting landscape continues to grow extensively as a staple form of entertainment for people around the world. According to Neal Schaffer, in 2021 alone there were 850k active podcasts with over 30 million total episodes. That's quite the number and it keeps on rising.

Podcasts, similar to other aspects of content marketing, should spark engagement, generate strong conversations with target audiences and stimulate thought leadership. There is a lot of scope in the B2B space for businesses to utilise podcasts as part of their content marketing strategy.

Similar to other content marketing types, podcasts are found by people who have a desire to learn about a specific topic. Their journey is not necessarily interrupted and they are able to search for the particular episode or series that answers the questions that they have. One of the best things is that people can discover and learn about your company by searching for a podcast that discusses the topic they want to know more about. This is where you come in with some great content to build recognition and take on the role of 'problem solver' for the listener who is then more likely to convert as a B2B customer or client.

PART TWO: CONTENT

Here are some quick tips for getting started with podcasting:

Define your 'why'

It's important to figure out what the objective is first when creating a podcast. Define the goals and the reason why you believe a podcast would work well. This will help you to produce effective content that reaches your target audiences to not waste your efforts, as well as helping you to stay on track.

Explore your podcast style

To get a feel of how you want to create the podcast, try listening to other podcasts. This can help you to determine the style you prefer, whether it be co-hosted, one person led, a panel or in interview style. An interview style podcast can work like the below for B2B:

Have a prospect, customer or perhaps a team member who is interviewed to talk about their experience using a particular product to engage listeners. This can be explored through different perspectives depending on the guest for the episodes. Through showing how pain points were resolved for example, this can encourage more leads and or prospects. This can also help listeners to build loyalty and trust with the brand.

Be aware of creating a process with a podcast involving scheduling, recording, editing and promotion of the content. This will help set the podcast content up for success and enable you to produce them consistently.

Record and edit

All you truly need is a good quality USB microphone and a laptop to get you started. If your podcast is going to feature interviews and guest speakers then these can be recorded using Zoom, Google Hangouts or other VOIPs — or there's always Anchor. Find an environment that is silent enough to record and you're ready to go.

Once you are done, then editing is the next step. Anchor is a very well known recording platform to use for podcasts especially at the beginner stage as little investment is required. Audio can be edited and when finished, the episodes can be distributed to podcast platforms such as Spotify and Apple Podcasts. Utilise the podcast show notes to add a short summary, the name of the guests if any, social media links and a call to action to encourage people to share the episode with others.

Time to promote

Now it's time to get people to listen to the podcast. Here are a few ideas to promote it:

- Post clips on social media, along with quote images. You can also look to engage with people who share their thoughts on the podcasts. Encourage them to share reviews via social media and on podcast platforms.
- Use email marketing to keep your database updated on future episodes and to build a relationship with your audience.
- Create an article on the same subject as your podcast to drive traffic to it and help it get found by search engines. If you're using a platform like Anchor, you can even embed the podcast recording at the top of your article.

Don't miss: 5 Reasons to Start a Podcast

PART TWO: CONTENT

How to start implementing video inbound marketing

Whether marketing promotion, a sales video or a new podcast, the simplest way to drive video adoption is to find that passionate person to own the culture and let them do what they love best. They might exist in your team already, you might need to promote their personal development to get them there, or you might need to consider hiring them in. Whoever they are, this person will provide a starting point, a fighting chance, an advocate for what is effectively a cultural shift across your organisation.

Put a camera in their hands, direct them to this read, and check back with them in a day, a week, a month. You might be surprised by where the next shoot leads.

PART THREE: DISTRIBUTION

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PART THREE: DISTRIBUTION

Bread and butter

Hitting publish shouldn't be the end of the process. In fact, you're not even halfway there. Discover how to extend your reach via social and content amplification platforms.

Even great content depends on a distribution strategy that promotes and shares it in all the right places. Not only will this maximise the number of readers the content receives, it will also improve the longevity of the content, enable marketing teams to reach new audiences, and increase the right kinds of conversions on the website.

There's no shortage of options available for promoting content. But few brands have the generous paid budget and the internal resourcing to try all the options at the same time. Instead, test some and see what delivers the best results.

The cardinal rule of content distribution is — you've guessed it — to review your persona research and focus on the platforms that your audience are most likely to actually use. Narrowing the focus in this way will give you more time to do content promotion properly, maximising your chance of success and boosting internal buy-in.

PART THREE: DISTRIBUTION

Chapter Twelve: Share across your buyers' favourite platforms

Look for the social media sites and forums where your target buyers spend their time and set about sharing useful, relevant content with them there.

I want you to think back to how you found this ebook. Did you spot it on your LinkedIn newsfeed? Was it recommended to you by a colleague or contact? (Bonus points if you're a subscriber or you found it via organic search.)

The way we see it, the secret to an effective social media strategy is to understand where your target buyers are spending their time and what content types work best on the various platforms. You could share all content across all channels, but you'll get better results (and save a lot of time) with a more strategic approach.

You can find these places by searching for them (not just via Google, but also through Reddit, Google+, Facebook, Quora and LinkedIn, for example).

Instagram has high rates of user engagement with brands, but with 67% of its users aged between 18-24, it's important to consider how a younger demographic fits into your business strategy. You can pay to promote your content, and there are lots of targeting options, including by job title. An obvious-but-still-worth-mentioning point is that Instagram works best when your company has a well-defined visual identity.

Facebook is a cost-effective channel allowing narrow targeting. It also boasts sophisticated AI capabilities, but do some research first to make sure it's relevant to your sector, and bear in mind that over the last few years, press surrounding the proliferation of 'fake news' spread across the platform has led to a growing scepticism among its audiences in regard to the authenticity of what they read here.

LinkedIn is an ideal platform for reaching professional audiences, making it a worthwhile consideration for many B2B brands. There's a lot to know about getting LinkedIn content promotion right, so it's worthwhile researching the subject in more depth. One feature that needs a special mention here is the site's SlideShare tool, which is great for packaging up and presenting content in an easy-to-digest format.

Discover eight effective ways to repurpose content for LinkedIn.

Twitter is a competitive platform because of its high-volume, low-value traffic. Your posts disappear fast, with a reported average lifespan of just 15 minutes. That might make you want to reuse each tweet multiple times, but your audience will pay more attention if you keep your posts fresh.

Other options where your audience might be found include online magazines, blogs, or specialist forums related to your sector or industry.

Learn the local customs

Your distribution activities will be much more effective if you spend some time understanding the 'etiquette' of the groups/platforms, add your own insight and analysis on other's content, pose questions to others, and get to know influencers.

If you're active on Facebook, for example, consider setting up an automated chat bot to answer any questions your content raises. The immediacy and accuracy of your pre-programmed responses is an excellent way to further engage the casual reader and encourage them to read more of your content. (See Chapter Twenty.)

PART THREE: DISTRIBUTION

The raw power of influencers

Find and reach out to industry experts and influencers, then ask for their opinions and encourage them to share your article with their peers if they found it useful. B2C is the obvious example of this kind of marketing, with the best-known examples being famous vloggers who review products to large bases. In a nutshell, fans sit up and pay attention when a vlogger they trust makes a product recommendation.

An equally strong, if not stronger, story exists for the case of influencer marketing in the B2B space. Think about it: as business buyers, we are far more likely to look for recommendations from peers and even competitors than we are to go in blind. If your target buyer is looking to make a significant investment in a marketing platform, CRM, new phone system, or even book a team night out, they are going to be wanting to reduce risk by seeking recommendations from others who have done the same before them.

Whichever side of the fence you're on, asking experts for their thoughts on your soon-to-be-published articles is a solid starting point. With their (hopefully insightful) quotes added in, there is a good chance they will then share the finished product, handily exposing your article and wider blog to their audience.

Repurpose with purpose

Tweak your content to make it suitable for LinkedIn, Medium or other relevant sites and you can squeeze a few more miles out of them. You don't have to do a total rewrite — just adjust to fit. For example, if you are posting to LinkedIn Pulse, you may want to shorten your article and provide a link back to the original.

If you spend 30% of your time creating content, we recommend spending the remaining 70% on its promotion. As long as your content is strong, this is when you will really start to climb above your competitors and engage relevant traffic, which is essential if you're generating leads that actually close.

Further reading: How to Attract New Customers on Social Media.

PART THREE: DISTRIBUTION

Chapter Thirteen: Promote content to your buyers specifically

At first glance this title looks like it goes against everything we've been saying. Surely the interruptive technique of paid advertising can't work with inbound? Well actually, not necessarily.

The essence of inbound focuses on your personas. Those semi-fictional representations of ideal customers are the foundation upon which everything else grows. Marketers are no longer simply thinking about a product. We're thinking about the people to whom we're talking.

If implemented using this same logic, paid advertising can be a valuable asset, particularly to the attract stage of the buyer's journey if rooted by the fundamental Inbound principles.

There are three forms of paid advertising that lend themselves particularly well to this: paid search, sponsored posts, and retargeting. At its simplest, paid search enables you to advertise your pages to users actively searching for your keywords, sponsored posts sit natively within social media feeds alongside content viewers have already chosen to see, and retargeting shows your products or services to users who have already visited those pages. With all of these forms of advertising, the paid element is simply expanding the reach of your content in a targeted way that makes sense for the customer, rather than just those footing the bill.

Make the most of content sharing and amplification platforms

The use of content amplification platforms is a paid tactic that will extend the reach of your content to your most valuable prospects. It allows you to put your content (still retaining your branding) in front of your target audience across multiple channels, including websites, social media sites, and other properties.

Examples include:

- **Flipboard** — a content aggregation platform that allows you to create a custom 'magazine' that users can find, share and subscribe to. Include a mixture of your own content and articles from external sources.
- **Outbrain** — a content amplification platform. Articles are promoted to relevant websites based on the topic of the article. Outbrain's algorithm finds the best sites to position your content to ensure the maximum number of conversions.
- **SharpSpring (formerly Perfect Audience)** — a content retargeting platform. Build adverts that appear on other sites once your visitors have left your website. As part of your blogging strategy, you should aim to create an advert that relates to the original article but contains a relevant content offer.

PART THREE: DISTRIBUTION

Syndication, the drug of a nation

Actually, syndicated content has no narcotic qualities as such. But who doesn't enjoy a good rhyme in a subhead?

Syndicated content, which is another paid service, can be seen at the bottom of website pages under headings such as 'from around the web'. Basically, syndicating your content means that you are paying to form alliances with partners who have high traffic, therefore hopefully putting your content in front of an audience that, if it became leads, would be more likely to close.

The inbound approach to paid advertising

Here are five ways to align paid advertising with inbound and see results.

1. Always have your buyer persona in mind

Social media sites make it easy to target your ads based on a variety of different metrics from job title and company size to skillset and groups they belong to. Keeping the persona in mind also ensures that you're targeting the right platform. After all, there's no point pouring money into Twitter Cards if your persona predominantly spends time on Linkedin.

2. Make sure that you apply the same rules as any other piece of content

It needs to be remarkable and offer something to the reader, whether that's helping them to understand a particular problem or giving them ideas on how to solve it.

3. Focus on the right stage of the buyer's journey

You've learned a great deal about how your target buyer is searching, and paid advertising is another opportunity to draw from this to deliver a more relevant and personalised experience.

Wherever your target buyer is along the buyer' journey, make sure the content you're advertising reflects this. If you're not able to target someone at a specific stage, the safest (and most customer-centric) approach is to deliver top-level content designed to inform or inspire. Anything overly sales focused will instantly get passed over by a reader if they are just researching and are not ready to make a decision just yet.

4. Test!

Inbound is all about learning from failures and improving every time. You could even run two very similar ads with small differences, and see what gains the best response. Don't just think that when an ad is published you need to stick with it. If it's not working, find out why and change it for the better.

5. Link to a landing page

Think of paid advertising as a way to draw prospects into the inbound methodology. Once a prospect is on your site, you are then in a position to persuade them to submit a form, growing your database and revealing more about individual contacts.

So really, the question of whether paid advertising and inbound can work alongside one another is not as clear-cut as it once appeared. By keeping it customer-centric and focusing on being helpful rather than pitching the hard sell, there's no reason why the two can't work well together.

PART FOUR: WEBSITE

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PART FOUR: WEBSITE

The elephant in the room

Your website should be a lead-generating machine. Instead, many businesses are stuck with elephants. In today's digital age, how is that even possible?

You might feel confident that your website is already good at generating leads. But leads that close? That's often a different matter.

When designing or updating your website, it's all too easy to think inwardly. It's your website, after all. Why shouldn't you be the focus? Remember who the real hero is. This is your buyer persona's story, not yours. They're struggling to overcome a challenge, to resolve the conflict impeding growth, and they've come to you for help.

Many websites, especially older ones, just don't address the buyer in this way. The prospect of making changes to accommodate this can be even more daunting. Traditional web development is time-heavy, expensive, and often seen as risky. Most businesses will have experienced the pain of a web project that was late, over budget, and ultimately wasn't what they asked for. Ask any project manager about the challenges of balancing timing, budget, and scope and you'll hear many tales of woe and anguish.

Instead, consider a more growth-driven approach to web development. Instead of waiting 18 months for a new website that will already be out of date by the time it launches, an iterative approach enables you to make smaller, frequent changes to your webpages as and when needed.

Rethinking your web development in this way transforms it from a clunky, outdated approach into a smart, iterative process you can use to improve user experience, help the hero, and capture leads that are more likely to close.

PART FOUR: WEBSITE

Chapter Fourteen: Convert buyers with personalised offers

Increase the number of leads that will close with engaging content offers and downloadable offers tailored to your target buyers

Here's where the plot thickens. You see, this resource wasn't quite free. Don't worry — we haven't hacked any accounts. But we might have quietly asked you for remuneration in a different kind of currency, one arguably more valuable than the green note you'd have otherwise swapped for this in a shop.

I'm sure you can see where this is going, but just in case: we offered this resource in exchange for your email address.

The concept's as simple as it is familiar: you offer the reader a valuable piece of downloadable content in exchange for their contact details. To generate leads that close, you therefore need to give real thought to the kinds of offers and resources available on your site. Content offers are gateways to leads, so they need to appeal to your buyer personas.

There's another step to the process that is often overlooked. If the content offer is the 'what', then the conversion path is the 'how' you convert website visitors to leads. The conversion path works behind the scenes, leading the prospect logically from the call-to-action on which they convert to a landing page and form, and then the thank you page and follow-up offer.

How to create a conversion path

At BabelQuest we use the HubSpot sales and marketing software to manage our clients' conversion paths (and everything else, for that matter), so these are terms by which we've outlined how to create one. The principle should be clear, however, so if you do use different software, you should still be able to follow these steps easily enough.

1. Create your offer

This could be in the form of a pdf download, a webinar, or consultation etc.

2. Create a landing page and form for the offer

Remember that the number of form fields should reflect the value of the offer. For example, for a downloadable guide, you should only ask for first name, last name and email address. For a consultation, you may wish to ask for a contact number and job title.

3. Create a Thank you page

This could include a call-to-action button to download the pdf if relevant. Remember to include a related offer as per best practice. This will also require a new call-to-action button. Publish the thank you page once it is complete.

4. Create a follow-up email

Add a link to the thank you page if relevant. Otherwise, communicate next steps. Publish the email once it is complete.

PART FOUR: WEBSITE

5. Review conversion path

Go back to the landing page you created earlier and ensure that the correct form, thank you page and follow up email are attached using the form module editor. (Click the form on the page to access this.) Make sure that you have saved any changes before publishing the landing page.

Note: Don't forget to make sure your landing pages are optimised for mobile. This is essential; regardless of whether or not your buyers engage through mobile, Google and other search engines favour mobile-friendly sites so this is best practice.

6. Create the following call-to-action buttons

Ensure that they are linked to your new landing page:

- Image CTA for related blog articles
- Image CTA for email signatures
- Button CTAs for relevant web pages (create a new one for each page the CTA displays on and name it accordingly)

7. Create a lead flow for your offer

Once complete, set this to display on all relevant pages.

8. Create a smart list

Base this on form and lead flow submissions.

9. Create a workflow and nurture sequence

Nurture sequences are typically between 3-4 emails. Use the smart list created in step 8 as the enrollment criteria.

10. Review and iterate

Review each of the assets in your conversion path on a monthly basis and make changes to increase conversions and improve performance based on the data.

Related read: HubSpot CMS vs Wordpress CRM: Your Handy Comparison Guide

Increasing the number of leads that close

You know your buyer personas like the back of your hand. This presents you with an invaluable opportunity to tailor the content offers on your website to address the unique challenges faced by your target buyers.

Your target buyers will immediately feel like your website and its offerings are more relevant to them. They will be able to relate more with the conversations that your content offers continue. Crucially, they will feel like you understand their problems and challenges, creating a connection and setting you above competitors with more generic or less relevant content.

Taking this approach when planning your content offers not only improves your likelihood of engaging the right kinds of leads — it reduces the content's relevance to leads that don't fall across your personas, essentially qualifying out less valuable or plain undesirable leads at the conversion stage.

PART FOUR: WEBSITE

Chapter Fifteen: Design the website around your target buyers

Turning your website into an effective lead generation tool requires a combination of data-driven insights and human-centred design

It's not just your content offers that can improve the relevance of your website to your target buyers. By designing the layout and navigation of the website itself around the buyer personas, you make it as easy as possible for your most valuable visitors to move around your content and engage with your messaging.

When you turn your eye to optimising your website for your target buyer, you'll find yourself faced with a multitude of questions and considerations. If your most valuable traffic comes from mobile, is your site mobile first? Is your buyer-centric marketing strategy reflected in the website? How fast is the page speed? Can you guarantee security? Does your website promote a personalised experience for your prospects, facilitating the idea that it is the first step in an ongoing conversation with each visitor?

Time, budget, and internal resources typically limit a company's ability to address all of these points simultaneously, making it important for you to list and prioritise the factors that will have the biggest impact on the experience your site offers.

To help you as much as possible, we have suggested a three-part strategy that you can work from when looking to align the look and feel of your website with the preferences and challenges of your target buyers.

Step one: What's actually happening?

Start with the evidence! Dive into your analytics platform and user research to validate the assumptions you have about how your target buyer navigates your site.

Let's take your homepage as an example.

Analytics and heat mapping

If you use HubSpot or Google Analytics, you should already have significant amounts of data to work from. In fact, your biggest challenge will probably be sorting through it all to reveal meaningful patterns.

To focus your efforts, start by concentrating on the largest behavioural trends, as addressing these across your site is more likely to have a corresponding impact on engagement metrics:

- What percentage of traffic bounces from your homepage?
- How long are visitors who don't bounce spending on your homepage, and where are they moving to next? If they move immediately to the FAQ section, for example, it could be that your homepage is not informative enough or is confusing the reader
- Similar deductions can be made for users moving from your homepage to site search, suggesting they were challenged with finding a quicker, more convenient link to the page they were looking for

Depending on the kind of insights your data reveals, you can begin making informed decisions about how the content, layout, and presentation of your homepage is affecting the user experience and their ability to become a lead that closes further down the line.

Learn how we increased website traffic and lead volume for forklift manufacturer TCM, of the Mitsubishi group.

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Talk to your target buyers

Just as important as examining how visitors are moving around your homepage is why they are behaving in that way. This is where qualitative research becomes valuable, offering motivational insights that you won't find in quantitative data.

Customer interviews are an accurate and revealing way of finding out the reasons behind site visitor behaviour. Invest the time in speaking with your target buyers to understand their motivations and the obstacles they experienced when visiting your homepage. Do their responses validate your quantitative data or challenge it? Both are valuable and can be used by your team to inform how the page is redesigned to deliver more dynamic, resonant content.

Small-scale implementation and testing

Cross-reference your data and interview transcripts with any other sources of information (email, sales calls, feedback on social media) to empower your design insights before implementing a set of small-scale A/B tests.

This initial multivariate approach will help to validate (or undermine) your decisions on a smaller, more manageable scale before you implement them across the entire page.

Step two: Implementing a growth-driven design

Once multivariate testing has confirmed the validity of your design changes, the next step is to mockup a full page redesign for review by the relevant people before going live.

If this is you, take the time to talk to the designers and the wider team about the changes that have been made — and why. They should be able to back up their amendments with empirical data accumulated over the course of the multivariate testing.

Once you have approved the mockup, the new design is ready to go live.

Step three: Constant testing and iteration

For many businesses, particularly those familiar with the more traditional approach to website redesigns, step two can feel like the end of the project. The new design is live, after all, and it has been thoroughly tested. This is especially true if the project has stretched on for months or years. By this time, most marketing managers will be glad to see the back of the project. Whoever is in charge of managing the budget is probably not far behind them.

This is an outdated approach to website redesigns and it is a mistake. The iterative nature of the previous steps means that instead of spending 12-18 months on a new or updated website, you can turn around smaller changes and amendments to key pages much more quickly, smoothly, and cost-effectively.

When reviewing the site's performance in this way, you might want to pay particularly close attention to core KPIs like the following:

- Conversion rate
- Submission rate
- Drop-off rate
- Goal completion

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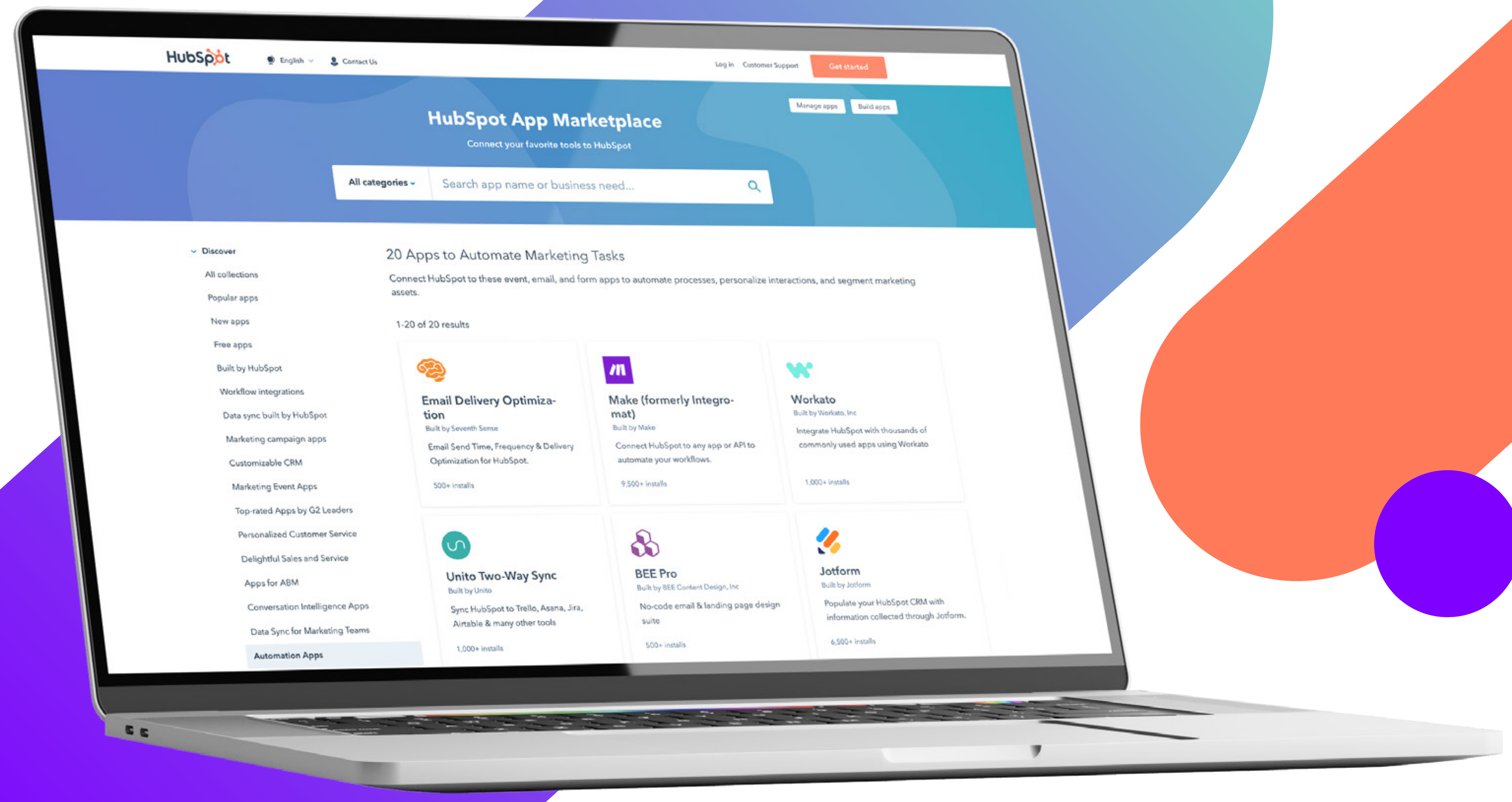
In short, a growth-driven approach to design gives you much more flexibility over the design of your website. As a result, you should be reviewing and optimising its performance on an ongoing basis, enabling you to tweak designs based on live metrics and changes in buyer behaviour trends.

Using data-driven design to increase engagement with your target buyers

Turning your website into an effective lead generation tool requires a combination of data-driven insights and human-centred design. This inbound approach enables you to make timely and informed decisions around the way your visitors are actually moving around your website, without ever losing sight of the fact that they are people looking to find answers to their questions as quickly and easily as possible.

We talk a lot about sales and marketing in the context of starting conversations with your customers. It's something that successful businesses are very good at, and it's one of the core values that shapes how we work with our clients. But what about your customers' voices? Where do they fit into this conversation?

In your website, as in your whole sales and marketing process, your customers' voices should be present in every change you make. They're shouting through your data. You're talking to them in a more qualitative sense when you interview them. Listen to what they're telling you they like and use this to create a site that talks back to them.



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Chapter Sixteen: Developing custom modules in HubSpot CMS

Take a closer look at the custom module creation process, from design and development to launch and results, for the HubSpot CMS.

When you're building a page in HubSpot you use building blocks known as modules. These are sections for adding specific types of content, and allow you to make edits to the page design as you go. They are styled to look and behave a certain way to match your website and branding and are controlled by a so-called theme.

Having pages for signing up to events, downloading offers or reading about chosen topics is an important piece of the inbound strategy puzzle. That's why HubSpot gives you the use of landing pages for free when you use the Marketing Hub tools and helps you to make sure these match your website.

The default modules that are included serve their purpose well. You can add things such as text, forms, images and call-to-action buttons.

However, sometimes companies find themselves in the situation where the default modules are too generic. They don't fit a specific purpose, yet for obvious reasons you don't want to go down the road of doing a whole website redevelopment.

This is when custom modules come in handy. Using HubSpot CMS, you can create modules — that are basically pieces of content — that can be added to existing pages. Perhaps having a logo scroller, or an area for customer quotes, for example.

When creating these custom modules you always need to tackle the following questions:

- **What will they look like for the site visitor?** The design, or visuals if you will.
- **How will they behave?** On desktop vs. mobile, animations, what happens when you interact with elements like clicking a button etc.
- **What can you edit?** The person who adds the modules on a page may need to make changes, switching out the image or the text. What can they actually edit, and what is locked?

Defining modules and designing the visuals

The first step of the process is to understand what you're missing from the available modules. Create an inventory of the desired modules and functionalities and the purposes they would serve. Similar modules can be merged, others deprioritised and until you have a manageable list of the modules you need to build your pages.

Next, design these page elements as individual components. You might also create page mockups of situations where they will be used to make sure they work in that context.

Get in touch with us if you want to have a discussion about modules or the HubSpot CMS and we'll gladly help you out.

Desktop vs mobile and deciding behaviour

Traditionally, organisations will start with the desktop version of each module before considering the mobile experience now so essential when designing and developing for the web.

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> **"It was great that we started with the desktop designs so we would have full control over the vision and brand. Having suggestions for the mobile design was helpful to make sure we didn't design something that couldn't be built."**
> Steve Dineur, Senior Brand Manager, Unmind

At the end of the design phase, you should have:

- A list of modules
- Visuals for each module for desktop and mobile
- Definitions of how these would behave when site visitors interacted with them

Mapping the Editing experience

Designing and defining what happens visually is not entirely disconnected from deciding on the editing experience. And these two often happen simultaneously, and circle back to each other as the editing experience may affect design choices.

A developer can create and code a module looking and functioning precisely as designed. But that would also mean that they'd need to go in and make updates to the actual code itself if anything needs to be changed.

So, in HubSpot and other CMS, a middle layer of editing is put in place. This allows non-developers, like marketers or page editors, to go into a visual editor and change aspects of the module without messing around with the code.

That means that a part of creating a custom module is figuring out exactly what the editor needs to be able to change. The width of a form or image may be set, while the background colour is not.

Some questions when defining editing:

- **What is 'fixed' and what needs to be editable on each module?** Such as switching out background colour, adding items or more than one image.
- **Do you need to be able to add or edit different elements for the desktop or mobile version?** For example, a module could allow you to add a specific image for desktop viewing, and another version for mobile.
- **What is mandatory to include when you edit the module?** Do you always need to have a call-to-action button? A headline? An image?

The visuals and behaviours of modules together with the editing requirements need to be defined before moving on to coding the custom modules.

A common hurdle is the balance between giving editors the freedom to create what they need that will suit their purposes, and not negatively affecting the overall design and website performance.

Curious about the editing experience? Have a look at this related read: HubSpot CMS for Marketers: A Quick Guide

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Development and testing

The final part of the process is developing the modules and testing them.

I'll keep talk of coding to a minimum (if you're interested in learning more about the code side of all of this, have a look at HubSpot's Developer Documentation) and summarise it simply by saying that this is where you r developers build the modules and put them into HubSpot.

Then the modules are put to the test by adding actual content to make sure they behave as expected. Some regular checks like different browsers and settings, but also from the editing perspective.

Between design and real life some unexpected situations may arise, such as content titles being three times their expected length. Before launching and using the modules, it's important to catch this and either adjust the module's editing parameters (so titles can't be as long) or it's visuals (so it looks good with a longer title).

When designing the visuals, consider what will count as 'realistic', 'bad', and 'no' case scenarios. Designs are usually done with an ideal in mind, but knowing early on what the typical use would look like helps keep some of these issues at bay. The 'bad' case scenario is a stretch beyond what's normal, but acceptable, while 'no' simply means you cannot make this type of edit. (Like the over-long titles.)

Process summary

In short, the process of creating custom modules is:

- [ ] Identifying what needs to be created
- [ ] Designing the visuals for these (for different type of devices)
- [ ] Deciding on behaviours and functions of these modules
- [ ] Defining editing needs for each module and what can/shouldn't be changed, including limitations on the areas that can be edited
- [ ] Developing, testing and tweaking the modules
- [ ] Launch, including adding to pages and going live with content

The process outlined here may look complex at a first glance, but it's really meant to show the work that goes on behind CMS development. In case you'd like some help, know that not all of our clients are heavily involved in making these types of decisions. We can lead from start to finish through the design process and can apply best practice principles so you don't have to get caught up in the details.

We've helped clients by creating multilingual websites integrated with other back-end ERP systems, stand-alone modules to existing websites, and new websites for brand refresh.

Get in touch with us if you want to have a discussion about modules or the HubSpot CMS.

PART FIVE: CONVERSION OPTIMISATION

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PART FIVE: CONVERSION OPTIMISATION

Bringing performance data into the conversation

74% of us are prioritising an increase in customer conversions. What can we do to transform more of the leads that will eventually close?

We're all here because we want more leads that close. After all, supplying a healthy stream of qualified prospects to Sales and ultimately seeing those close into customers is the foundation of our role.

So the question is, why should you bother testing and iterating your marketing when you have a long to-do list already? There is so much out there about conversion rate optimisation, improving the impact of your emails and debating which colour works best for a CTA — will it really make that much difference?

Actually, improving conversion rates can make a bigger difference on your bottom line than many other marketing efforts. Just getting visitors to your website is no longer enough. You need a bigger game plan. You need to make them see that you're relevant and able to help them specifically.

You need to have the right context, and that means testing.

The important thing when it comes to testing and iterating your marketing for improvement is getting clear visibility of your efforts so you can actually see their performance, making it easy to rapidly edit and update your marketing to get the highest results from your campaigns.

PART FIVE: CONVERSION OPTIMISATION

Chapter Seventeen: Use data to test, iterate, and improve

Generating leads that close means generating the right kinds of leads. The only way to optimise your activities so that they speak to those people? Testing and iteration.

Back in 2015, HubSpot carried out a test that revealed 92% of their monthly blog leads were coming from historic posts. Even more interesting, they found that 46% of their monthly leads came from just 30 individual posts. For a company that was, at the time, publishing nearly 200 new posts every month, this must have been quite an eye-opener.

By taking time to step back and look at the figures, HubSpot identified areas of focus, like improving the conversion point on high-traffic, low converting posts and increasing traffic to posts which were already converting well. By adding the schedule for updating posts to their editorial calendar they were still creating new timely articles, but were also able to improve the overall performance of the blog.

If you're a HubSpot user there really is no reason why you shouldn't be testing. Let's take a look at some of the key tips you could be implementing today.

10 ways to improve your A/B testing

1. Keep your tests to a minimum

Now that you're reading all about A/B testing you're probably starting to think about all the different things you would like to test in your own marketing. Great! But try not to get too carried away. Running too many tests at once on interlinking elements could actually end up giving you more of a headache, and you'll quickly lose track of what you're doing. On the subject of which...

2. Stay clear by testing only one variable at a time

Typically you want to be testing just one variable at a time to make it easier to track what it was that created a positive result.

If you were to A/B test making a cake, you wouldn't want to swap both the flour and the eggs at the same time. You'd be better off starting with checking the impact of organic vs. non-organic eggs. The same would go for if you A/B tested a different version of a form on a landing page as well as a different headline. How would you know which change causes the increase in leads or how much better the cake rises and tastes?

3. If you want to make an impact quickly, think bigger

Whilst you should definitely be testing small things like button colour or background shade, you should also consider making your entire landing page, call-to-action or email a variable in itself.

Instead of testing individual elements, such as headlines and images, design two completely different versions and test them against each other.

This can be a great option for marketers who want to see improvements very quickly, particularly if you are considering a homepage redesign for example. It also means you can switch back to the control version if things go in the wrong direction completely. The drawback? When opting for this approach you should then take the time to try and understand what it was specifically, which made the difference.

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4. Don't forget to test minor changes

Although big changes are good to test, the small details are often just as important. Even a simple change like switching the image on your landing page or the colour of a CTA can drive big improvements.

In fact, these sorts of changes are usually much easier to measure than the bigger ones. Going back to that cake, why not test out blackberry jam vs raspberry in your victoria sponge and see which gets the bigger thumbs up?

5. Measure as far down the funnel as you can

Sure, your A/B test might have a positive impact on your click-through or conversion rate, but how about your sales numbers? You may discover that an email with fewer clicks or a landing page with few conversions actually produced more sales. Your ultimate goal is that your leads go on to become customers, so make sure that you are checking that your quality doesn't decrease with an increase in numbers.

6. Make sure that you have a test control

In any experiment, you need to keep an original version of the element you're testing, setting up this unaltered version as your 'control'. From there, build your variation and test it against your control version. An example of this might be if you currently have a red button on your CTA — create an A/B test to see if a green button will make any difference to the click throughs, but keep that red button as the control.

7. Decide what you want to test

There are so many things that you can be testing. After all, you could be testing CTAs, landing pages and forms on your website even before you get to the emails and workflows which run behind the scenes.

Top tip: Test those things that are going to have the biggest impact first, and then test the others in order of greatest to least importance. You certainly don't have to do it all now.

8. Split your sample group randomly

In order to achieve conclusive results, you will need to test with two or more audiences that are equal. The good news is that if you're using HubSpot to A/B test a landing page or CTA it will automatically split visitors randomly between the two. With an email, you can set the percentage you would like to test before sending the winning version to the rest of the recipients. Ideally something along the line of 15% for version A, 15% for version B and then 70% to receive the winning version. Remember, if you have a list of less than 1000 you can only split 50/50.

9. Keep your testing consistent

Timing plays a significant role in your marketing campaign's results, be it time of day, day of the week, or month of the year so make sure you test two versions at the same time to avoid a skewing of the results.

That said, this isn't always possible, particularly as you cannot currently A/B test web pages in HubSpot. If you do want to test these and don't want to use an external tool like Optimizely then you could still run a version for a month and make an iteration to it to test for another month, but be aware that your results may not be 100% accurate.

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10. Decide on the necessary significance of your results

When you are looking at the results of a test you need to make sure that the difference in conversion rate between your variation and the control is not due to random chance — that it has clear statistical significance and can be used as a catalyst for switching to the winning version full time.

Ultimately this comes down to how risk averse you are, but the size of your audience is also a big factor. If you are working with a relatively small audience size, you need to decide what your point of statistical significance will be with a higher level of risk, as you will have less data to work from.

Now you understand why testing can be so important, and we've been through best practice, what are some of the things you could be testing?

Increasing conversions with landing pages

A key element to a landing page is a form, but rather than sticking to the same set of fields you should be testing them to see if it improves your conversion rate.

Here are a few things you could consider testing:

- Number of form fields
- Type of field (does a drop down work better than a radio select?)
- Do field labels work better above, next to or inside the field?
- Colour and copy of the submit button
- Does the wording of a question impact the quality of the answer?

Always consider what you really need information-wise from that form submission. If it's a consultation request, you may need to ask for a telephone number as well as an email but could you omit 'industry' and find it yourself? Lots of information is freely available online so as long as you have the crucial information covered and you are making it as easy as possible for the buyer to convert.

Remember to look at the whole page, not just the standard things which are always written about in A/B testing articles. Think outside the box.

The fastest way to achieve drastic results and produce a landing page that drives a lot of conversions is to test the entire page.

Here are a few examples of things you could look at testing on your landing pages:

- Formatting and style of the copy
- Plain paragraphs vs. bullet points
- A longer block of text vs. a shorter block of text
- Form placement
- Different images (does an image of the ebook cover work better than a snippet of the ebook itself?)
- Performance of various stylistic changes on mobile vs desktops

PART FIVE: CONVERSION OPTIMISATION

Increasing conversions with email

Here are a few ideas for testing your emails in order to improve engagement:

- The wording of your call to action
- Email Sender — try sending the email from a real person in your business instead of a generic hello@ email address. Equally, you might want to test who that 'real person is', whether it's a thought-leader in your business or the person the contact has been speaking to in Sales
- Play around with the length of the subject line or add personalisation by using the contact's name or company name.
- Try using a plain text email vs. a designed HTML one
- Stagger your email delivery for a month with Seventh Sense and compare it against bulk sends to see if it impacts deliverability and open rate

With so many things to test, consider a priority order and work through them from there to try and get the highest impact tests first.

Increasing conversions on your website

Ok, so clearly there are many things you could be testing on your website, but let's look at a few of the ones you should be trying first:

- Test different wording and text sizes for your homepage headline to really grab your reader's attention and gets them to keep reading
- Where you place your call to actions can have a huge effect on how well it converts, so test a few different positions
- Highlighting a CTA next to an image? Try out whether changing that image makes a difference to the click throughs
- Does the copy length and style impact the conversions of the page?
- Try testing different offers to see which works better on a page

Since A/B testing is not currently possible in HubSpot website pages, you have to have a plan. Either opt for one of the external tools which allow you to do it, or make a change and leave it for a set amount of time to see how it impacts your chosen metrics. In the case of that latter option, always have baseline data prior to testing so that you are able to measure the difference.

Increasing conversions on your CTAs

There are of course the standard, much talked about ways to test your CTAs, including button colour and copy, but there are so many other things out there too.

How about testing the format of your call to action, looking at whether a text link works better than a button or image or testing the size to see if it jumps out more?

Position is also something which you may be overlooking. We are all in the habit of putting CTAs at the end of our articles, but with a narrowing attention span, how many people actually read to the bottom, or end up clicking through if they do get there?

Much like we all started overlooking overly obvious ads a few years ago, it seems that people are now developing an overall 'banner blindness' which extends to CTAs. Trying out a text-based CTA with relevant anchor text in the body of an article could drastically improve the click through rate of engaged leads.

PART FIVE: CONVERSION OPTIMISATION

Chapter Eighteen: Improve relevance with smart content

If someone hits your homepage and can't figure out if you're going to answer their question, or be relevant to them, they will go back and find another search result.

Think about it. Someone who is going to close as a customer in the next few days is going to be looking at your site in a very different way to someone who has just found it through organic search. The live prospect may be very interested in case studies and the ins and outs of your product, while the first-time visitor is more likely to want to see if you can help them fix their specific problem.

By using context to create content tailored to those varying needs, you can really boost your conversion rates and stop losing visitors who feel overwhelmed by a wealth of technical information on their first visit.

That all may seem a little easier said than done.

Before I delve into the next section, which goes into how to start putting together a plan for implementing contextual marketing, it's worth saying here that this next part is very specific to HubSpot, as this is the platform we work with and encourage our clients to use.

Who are you targeting?

Segmentation is crucial for personalising your marketing with context. If you don't know who you're focusing on, how can you tailor it?

There are various ways you can decide to segment your data. Here are a few examples:

1. Device

This can be a great one if you get lots of visits to your site from mobile and want to streamline a landing page so that there is less text and a shorter form if the visitor is on a smaller screen.

2. Source

This one is a bit of a hidden gem in the crown of HubSpot's Smart content options. If you're running a very targeted campaign across say, LinkedIn then you can customise a page based on whether they came from that or not.

3. Lifecycle stage

Whilst you should definitely be testing small things like button colour or background shade, you should also consider making your entire landing page, call-to-action or email a variable in itself.

For the purpose of this article, I've stuck with lifecycle stage and have chosen the following three segments:

PART FIVE: CONVERSION OPTIMISATION

Unknown visitors — you always need to have a default with Smart content, mainly because this is what will be indexed by Google, and needs to be applicable to anyone.

Sales-qualified leads — these are live prospects and will most likely be in talks with your sales team. You'll want the content for this segment to be helping them on their path to buying, but will treat them slightly differently as someone who is brand new to your site.

Customers — taking into account the delight stage of the inbound methodology, you don't want to forget contacts once they become a customer. The opportunity for future sales and even them becoming a referrer should mean that you are wording sections of your site so that they don't feel forgotten once they have closed as a customer.

What data do you need?

Often overlooked, a crucial part of successful contextual marketing is knowing exactly what information you need in order to create your segments.

Progressive profiling is also a great way to collect information without having lots of very long forms on your site, which will also help you with your user experience and improve conversions!

For our example, we would need to make sure that all of our contacts have the correct lifecycle stage assigned. This would involve having a process which marks customers as such when they close, or as a sales qualified lead once they have been picked up by Sales.

I've spoken before about the benefits of analysing your marketing data in order to positively impact your next step. You may even find that you have already gathered some interesting trends and insight which could help your marketing, so a marketing audit may be a good idea.

Which page(s) will you start with?

As I'm sure you're starting to see, contextual marketing can quickly become complicated when you're aiming at multiple segments, so it's always a good idea to start small.

Using my example, we are looking at personalising for 3 different audiences, so that's already a lot of content for one landing page, let alone if you want to roll it out across all site pages!

Consider where you can start making the most impact and go from there. This might be a landing page for a guide which would be really useful for all segments and would benefit from slightly different wording for each to help conversions. It may even be your homepage if you're segmenting by source and want to show visitors from a specific campaign a very specific first message.

How are you going to personalise it?

So you've got your chosen segment and know which page you're going to customise first, now it's time to decide which elements of the page you are going to make Smart...

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Text

Smart text can be a simple, but effective way to see a positive lift in conversions and helpfulness to your visitors. Phrasing can be everything. Let's take your homepage as a quick example, thinking of the module at the top of the page.

A new visitor will need to know exactly what sort of problems you help people to solve within seconds, so that they know you are worth their attention.

Someone in conversation with your sales team could be checking out your website to validate what the sales team has been saying. Getting the same messaging on your site so that your business is appearing consistent could be crucial.

It may be a good idea to tell a known customer about a recent company update, or to direct them to details of information of an upsell which complements a product they already have.

CTAs

This is a quick way to build conversions. If a lead has already downloaded an offer, show them a different CTA so that they are encouraged to download something that makes sense as a follow-up!

Forms

A Smart form can be something as simple as not asking a returning visitor to fill out all of the same fields every time they complete a form. If you have the information, you don't need to ask again.

Remember, progressive profiling can help you to build a great bank of useful information about a contact which can be used to help them without forms seeming overwhelming.

HTML

If you have a video on your homepage, why not have it tailored so that a case study appears for leads and an awareness stage video for visitors which helps them to address their problems?

The key to all of this is thinking about your segments. How would a customer be attracted to an offer differently to a new visitor to your site? What would be important to someone who is currently considering buying your product or services?

Note: *Make sure you're sensible with this. Greeting your visitors with their name on your homepage can come across as a little creepy, so keep obvious personalisation to areas where it makes sense like a thank you page or once they've logged in to a gated section of your site.*

PART FIVE: CONVERSION OPTIMISATION

Check your conversion path

Now that you've got all of your elements ready, consider what each segment will do in order to get to that page, and where they will go next.

Do you need a smart CTA to get them there in the first place? Does that CTA need to be smart in order to match the way you're phrasing the offer on the page? Putting yourself in the shoes of each segment will help make your personalisation watertight and logical.

Always remember that you're the last person your marketing is for. Make sure that every aspect from the design and layout of your website, to the copy is relevant to your target persona, and tailored to the individual to really boost that user experience and ultimately lead to better results in line with your business aims.

This is often a very underutilised strategy in marketing, and for a very good reason — it can get complicated and demanding on your resources very quickly.

The sure-fire way to do well with this and learn what works is to start small. Build up the way in which you are using context to tailor your marketing. If you can do that, you can really start seeing an impact on the number of leads engaging with your marketing — and the number of sales that are closing.

PART SIX: MARKETING AUTOMATION

CONTENTS

PART SIX: MARKETING AUTOMATION

Saving time and staying efficient

You know what your leads want and you have the content to help them. How can you deliver this at scale without depersonalising your conversations — or overspending?

HubSpot defines marketing automation as ‘the software that exists with the goal of automating marketing actions. Many marketing departments have to automate repetitive tasks such as emails, social media, and other website actions. The technology of marketing automation makes these tasks easier.’

If you’re not familiar with the concept, you will doubtless recognise the challenge it addresses: a high volume of leads in the pipeline and a great conversion rate means nothing when 73% of your qualified leads aren’t ready to close yet.

Now more than ever the buyer is in control, with a wide variety of information available to them and a blinkered approach when it comes to an obvious sales pitch. To match this change in behaviour, we need to be building relationships with our prospects, rather than trying to demand their attention when we want it.

So how to do this effectively without putting them off before that all important decision stage? And how do you do this consistently within the limitations of your budget and resourcing?

The key is through marketing automation.

PART SIX: MARKETING AUTOMATION

Chapter Nineteen: Nurture leads with relevant content

Keep the conversation going between you and your leads with helpful emails containing links to content that will help them close.

Just because your prospects have signed up to your blog or downloaded a guide, it doesn't mean they are ready to hit 'go' yet. Even more qualified leads, like those who have downloaded a pricing list or spoken to one of the sales team, may well have decided to try solving the challenge they are facing themselves first.

At this stage, the lead is still little more than engaged traffic. You need to respect that, and be on hand to offer advice if (or when) they find the DIY approach too difficult.

We've already covered why you need to be customer centric at all stages of the buyer's journey and appreciate that a prospect is likely to move back and forth through the stages as part of their thought process.

This means you need to be visible throughout that journey.

Create an email sequence

A nurture sequence is typically a series of emails delivered to your contacts to provide them with helpful or otherwise relevant content that engages them and moves the further down the sales funnel.

Because your marketing strategy is tailored around generating the specific leads that are going to close, you are in a strong position to engage and nurture your leads towards this, but there are still challenges that could limit the effectiveness of your lead nurture activity if not taken into consideration.

- Your leads will not all have the same challenges, even if they fall within the same persona. By virtue of the fact that everyone's situation will be different — even subtly — you should be conscious that one email workflow and its messaging will not be relevant for all your leads
- Remember that the point of lead nurturing is to create relationships with your prospects and help them to feel a connection to you and the business. Sending standardised, obviously automated emails really won't help
- We all have overcrowded inboxes, and we all have those moments where we sit and unsubscribe from a few when it just gets too much. Make sure that your emails survive the cull

Improve your relevance with segmentation

You can never hope to talk to everyone at once and say the right thing. Segmentation is the best way to make sure that you're treating different parts of your database in different ways.

There are many ways to segment, from personas (a business owner will have different priorities and needs to an administrator) to individual industry sectors. Take a look at your list and consider the most sensible way to split it up and tailor your messages effectively.

Always keep the buyer's journey in mind too. Once you've segmented, make sure you're also looking at their actions on the site to figure out what stage they're at. It's a great idea to have a workflow in place to send automated emails out, tailored to what they've downloaded.

That way you know you're being relevant and can also guide them towards the next step.

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Segmentation tips

Segmentation doesn't have to take up all of your time. Consider creating a workflow which automatically enrols prospects when they download a specific guide, and send them an email a few days later asking if they had any questions. You've put in the effort to get them to convert, so don't let that drop off straight after.

As well as asking if they have any questions you could also highlight a blog which relates to the topic. Line up a few well spaced emails after this, which show a few more relevant blogs gently encouraging them to subscribe and boom, you have a nurture sequence that is relevant, tailored and goal orientated around that subscription.

Don't just rely on the website to kick start those nurture sequences. If the sales team is speaking to people who aren't ready to progress, get them to put the prospect into a workflow for the area they're interested in.

Be human!

How to make your marketing emails more human:

- Use personalisation tokens to insert their first name and anything else that is relevant to the email (if it makes sense to mention their business name and it's included in your forms, do!)
- Write as you would talk to a prospect in real life. Just because it's an email doesn't mean it has to be an overly contrived essay
- Ask questions, and share recent conversations so that you aren't just pitching them an idea
- Never send a marketing email that you would hate to receive (this may sound simple, but why are you receiving them if this is common sense?)
- Consider the layout of your emails. Do they look like marketing communications, or would you be better using a plain text format to enhance that personal touch?

Don't crowd a prospect's inbox

Having a purpose and clearly defined goal for each email and each sequence as a whole is important. If you're taking the time to start a conversation through your emails, and personalise them, don't fall at the last hurdle by messaging them for the sake of it.

What do you want the receiver to do after they read this email, or when they reach the end of the sequence? If your end goal is to get them to subscribe to your blog, take time to show them why it's beneficial to them. If you are looking for engagement and responses, provoke an interesting train of thought.

The golden rule of automation? Don't bombard them. Figure out how long the gap needs to be between emails (trial and error is your best friend here) and make sure you're using suppression lists to avoid them being enrolled in multiple workflows at once.

If they simply aren't engaging, send a break up email for one last try, and leave them alone. If they want to come back in future they will, but for now you know you tried.

Next steps

Already have a lead nurturing strategy? Great! Always remember to review your progress and iterate. Don't wait until later to review your data. If something isn't working, there is a reason and you need to find out why.

If you don't already have a strategy for lead nurturing in place, you really can't afford to leave it alone. Forming those connections should be a big part of your business, helping you to not only close leads but earn those prized referrals we all yearn for.

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Chapter Twenty: Think outside the (in)box with AI

Today, generating leads that close means speaking one-to-one with prospects at their convenience. When time or scale limits this, the technology now exists to enable those conversations.

Creating relationships with prospects needs to be an all round effort, not just a single email sequence. Your leads expect to be able to reach you at any time. They want your help. They're starting to trust you, even depend on you for the information and advice you've dispensed up until now. You're Dumbledore, remember?

But you can't predict what they're going to ask and you can't predict when. Email automation serves its purpose well, but leads expect immediacy and open channels of communication at all times. How, then, can you keep your presence going outside of their inbox and your website?

Think back to the section on distribution, and you're almost there: you take the conversation to their favourite platforms.

Getting social with AI

By definition, social media platforms are the places your leads go to ask questions and engage in conversation. According to HubSpot research, "71% of people are willing to use messaging apps to get help".

A chat presence on your prospects' platforms of preference shows that you are at their disposal, making it as simple as possible for them to engage with you at their convenience.

- Automating this process comes allows you to manage large volumes of questions that could swamp non-automated live chats
- It frees you up from a resourcing perspective, so your team can operate more efficiently on core sales and marketing activities
- It ensures that the prospect is always met with an immediate and personalised response, based on the question they have asked

The biggest advantage? It puts your customer in the limelight. Messages are not a new version of emails — they're more informal and mimic the way we interact with each other, so your prospect feels valued, respected, and satisfied.

Your buyers are thinking beyond your website — are you?

Can you confidently say you're exceeding customer expectations?

In a customer-centric marketing world, being able to exceed your customers' expectations is fundamental to success, and satisfying your customers from the moment they become prospects sets the tone for the rest of the relationship to come.

You already know that today's prospects expect seamless interactions when they engage with a business. By automating every stage of the buyer's journey across multiple different platforms, you can guarantee that seamless integration.

If you've marketed on social channels before, you'll already know they do everything they can to keep users on their platforms. This isn't always the easiest challenge to navigate when you're trying to drive traffic to your site, but messenger bots comply by delivering content directly on the platform.

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Chat apps can even be used to assist the sales process. Automate them to address specific sales questions/queries and quickly serve up quality answers or redirect to a human if more complex.

HubSpot's chatbot tool

With chatbot usage doubling over the pandemic, it's no surprise that HubSpot's chatbot tool is rising in demand. How could your business benefit?

According to some research, 67% of worldwide consumers claim they've interacted with a chatbot to get customer support over the past 12 months.

And when you think about it, it makes a lot of sense. Chatbots are there to help, after all, and it's fair to say that most of us have needed a bit of that in recent times.

But it's not just website visitors and existing customers who can benefit from a well-placed chatbot. They can help businesses deliver a better service, too. With public adoption continuing to grow, chatbot functionalities are only going to get more and more impactful.

As an Elite HubSpot solutions partner, we've been using this tool for years. In this section, we share our experiences, and those of one of our clients, so you have everything you need to be inspired and get started with building your own.

What problems do chatbots solve?

Westminster Commercial Waste's customer service team was spread thin. Not only were they fielding incoming queries from a shared inbox but they were also spending the majority of their day on calls answering the same questions over and over again.

Not all of the questions were even relevant. Does this sound familiar to you?

It's no secret that customer service teams have been up against it these last few years. Across industries, customer service functions have struggled with reduced staffing levels and increased — or unpredictable — traffic volumes.

Our client was no exception, so we proposed setting up a chatbot to help them manage the volume of traffic, relieve some of the service pressure and deliver a better experience.

How do you build a chatbot?

When building a chatbot in HubSpot, you should begin by asking yourself who, what, when, where and why:

- Who are we targeting?
- What questions are we answering?
- When will these need to be answered?
- Where should it sit on the website?
- Why are you creating this chatbot in the first place?

For our client, who handles commercial waste collections in Westminster, the most important problem they needed their chatbot to solve was how to separate residential enquiries from commercial enquiries.

This called for an automated chatbot that could field visitors into two pots: one for commercial clients who would be sent on to a live chat and another for residential clients who would be sent to the appropriate website.

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With this clear objective in mind we followed the below steps:

1. Targeting

We recommend starting off by having your chatbot on all your key pages. It's much better to be found too easily by your visitors than risk them not being able to find you at all.

From here you can analyse your chats and determine whether you need to take your chatbot off certain pages, implement automated chatbot questions, or have a live chat.

For our client, we even created bespoke chatbots for different service pages when we noticed we were getting recurring questions.

For example on their bulky waste page, they would often get asked specifically for the bulky waste collection form, so we created an automated chatbot that quickly and easily answers this question.

Having this set up means our client saves over 40 live chat conversations a month.

2. Availability

So you've decided you want a chatbot, and you even know where you want it to be hosted on your website — but what about the 'when'?

Setting availability in terms of office hours and chat routing is essential. Firstly, decide on whether you want it to be 24/7 or just during office hours.

For our client, we thought the best course of action was to have one chatbot that fielded enquiries into live chats for office hours, and a separate one that fielded enquiries into tickets for out of hours. This means that no request gets swept under the carpet and the team can easily find all tickets in HubSpot's brilliant support pipeline.

Now you have working hours sorted, what about when no one is available to pick up another chat because they're all already in one? Well, HubSpot has a fabulous solution — you can redirect them in the same way as the out of office chatbot.

By implementing this method for our client, we have taken, on average, an additional 60 customer service requests a month.

3. Build Dashboards

Once your chatbot or live chat is, well, live, you then want to analyse its performance. In HubSpot, there's a huge range of reports available that cover:

- chat response time by assignee
- chat volume by chatflow
- chat conversations by URL
- chat conversations missed
- chat conversation closed totals by rep
- chat conversation totals by source
- chat conversation totals over time

By having these reports, you can not only monitor the success of your chatbot but also that of your team, allowing for optimisation that brings the best possible customer experience.

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For our client, we set up a weekly report that gets sent out on a Friday covering the week's chatbot/conversations performance. This allows transparency and visibility across the service team and has helped to improve individuals' performances, too.

For the full picture of how we helped Westminster Commercial Waste Services across marketing and customer service, read this case study.

From automation to conversation

Before we move on, it is definitely worth noting that chat automation should be used as a stepping stone to a real-life conversation. Yes, it can help qualify a lead to know they have already engaged with your chat bot, but we're not yet at the stage where they can close your leads for you.

A quality conversation — and the sign of a well-programmed chatbot — should always offer the prospect the opportunity to speak to an actual salesperson or book a meeting slot with one of your team. We're at the start of a marketing AI revolution, but for now, at least, we're still the ones in charge.

Discover three use cases for HubSpot's chatbots and how they help you to work smarter.

PART SEVEN: MARKETING AND SALES ALIGNMENT

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A marketer and a salesperson walk into a bar...

Since buyers have become more empowered by freely available information on almost anything, they have taken control over the sales process.

If you remember back to the beginning of this ebook, we highlighted a fundamental shift in the way that buyers — particularly within B2B — are making purchases. Traditional sales techniques don't work any more, with recent Gartner research suggesting that only 17% of B2B buyer stakeholders' total buying time is spent interacting directly with supplier sales teams. As small as it is, that 17% of purchase activity allocated to supplier interaction represents all suppliers, not each supplier."

> **"In a survey of nearly 1,000 B2B buyers, 43% of surveyed respondents agreed that they would prefer a rep-free buying experience. When cut by generation, 29% of Baby Boomers preferred to buy solutions without rep involvement, while remarkably over half of Millennials, 54%, expressed the same sentiment."**
> Brent Adamson, 'Traditional B2B Sales and Marketing Are Becoming Obsolete', Harvard Business Review

Companies sometimes mistakenly view Sales as the 'next step' after Marketing, whereas in reality it's an integral part of the process. The inbound methodology can be thought of a circle. HubSpot imagines it as a 'flywheel' that drives company growth. By attracting customers who have a problem that their products or services can solve, by engaging with them on the buyer's own terms, and by delighting them at every stage of their buyer's journey, businesses today can create momentum that will drive their growth. This is a huge advantage over the typical funnel viewpoint because it means that no one department is responsible for the company's growth.

The underlying aim is to align your sales process with your inbound methodology, so that you're creating BANT qualified leads (people with the Budget, Authority, Need and Timescale to buy) and converting them efficiently into not just a sale, but into an engaged repeat customer. For this, you need to build a strategic sales and marketing plan that is integrated in all functions of the customer's buying process.

It's a scenario you are likely to know well: your marketing team generates a lead and passes it over to the sales team, who decide whether to do something with it or not (often the latter if they question the quality). But what happens then? Does your sales team give feedback to marketing about the quality of the lead and the results?

If not, there's a broken link in your revenue generation process that you need to fix. Sales wants qualified leads that they can move forward to buy. Meanwhile, Marketing is focused on generating traffic for your website. Somewhere in the middle, many businesses lose visibility, creating the potential for leads that might otherwise have closed to get lost in miscommunication. The problem often stems from a mismatch of goals between the two teams.

To address this mismatch and align your sales and marketing operations, you can reassess your handover process.

PART SEVEN: MARKETING AND SALES ALIGNMENT

Chapter Twenty-One: Ensure a smooth marketing to sales handover

A marketing-qualified lead is more likely to close, but 90% of them never connected with Sales. A smooth handover is key.

It's a familiar story: the marketing team will say they are effectively generating leads, but go to Sales and they will say those leads aren't even worth looking at. The real problem? A lack of communication.

Aside from hindering revenue goals, this disconnect can also impact internal resourcing. One big example of this is that the average salesperson spends 30 hours a month customising content for their prospects and uses less than 10% of the deliverables that Marketing provides them with. Imagine how much more time your sales team could spend helping leads to close into customers if they were using some of the content that Marketing was spending time creating.

Aligning sales and marketing efforts is fundamental to any business seeking sustainable growth. Whilst many of us will readily admit that our main goal is revenue generation, it's still a rarity to see full alignment in businesses. Sales creating its own content and ignoring the website, varying messages being delivered from the two departments confusing prospects, and a lack of agreement on lead quality are certainly challenges faced by many of the businesses we encounter.

Don't get us wrong, it's not that the C-suite are indifferent to these challenges. The real problem lies with implementation and the bringing together of two departments that have a traditional rivalry going back decades.

If only both teams could work together, the name-calling would stop. And as they begin to achieve this, you'll find you have a stronger, more revenue-oriented business focused on (yes, you guessed it) generating leads that close.

The first step to aligning Sales and Marketing around this common goal is to define and document an SLA (service level agreement) to which both departments are accountable.

Here are the six steps to creating one.

1. Agree on your personas and ideal buyer

If you can't agree on who you are targeting then we may as well stop here. Setting out these targets will help to focus both Marketing and Sales and ultimately get them working more in sync. After all, if Marketing is handing over leads for a different persona than the one Sales is focusing on, they're not going to progress far.

Think back to how important your buyer personas were for your marketing activities. Now consider that your marketing and sales activities are two ends of the same process. Your personas have the potential to transform the effectiveness of your sales activities, providing invaluable insights into how to communicate with a lead, what the lead cares about, even their pressure points — but Sales has to be able to agree that they are the right persona in the first place.

2. Decide your lead definitions

Knowing the process your prospects go through from their first touchpoint with marketing right through to closing as a customer at the end of the process is important, but making sure that Marketing and Sales are both singing from the same hymn sheet when it comes to the definitions of the stages in that process are crucial.

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At what point does a lead become qualified and ready to be passed to Sales? If both departments disagree on this, it's not very likely that those marketing leads will progress very far.

Establish a clear definition for each stage of your revenue generation process, but most importantly, make it crystal clear what a marketing-qualified lead and sales-qualified lead is.

As a guide, here are our definitions:

- **Subscriber.** This person has subscribed to the blog or marketing updates but is not yet a defined lead
- **Lead.** This person is on the marketing radar but does not yet qualify for a sales conversation. On the Sales side, this could be a prospect who hasn't been qualified yet but looks like a target
- **Marketing-qualified lead (MQL).** Marketing has defined this lead as 'ready for a sales conversation'
- **Sales-qualified lead (SQL).** Sales has spoken to the contact and is actively engaging with them
- **Opportunity.** A contact who has been qualified and is at the advance to planning stage or later

3. Outline goals and expectations in a service level agreement

Establishing goals and expectations for Marketing and Sales and documenting these in the SLA will make both departments accountable for their activity and the overall success of the alignment.

We're not asking you to pluck numbers out of the air here, but consider what makes sense for your business and what realistic timeframes for completion should be. As well as departmental goals, is there a clear revenue goal assigned to both Sales and Marketing? Setting a single revenue goal across both departments is an effective way of helping them visualise their new working relationship while ensuring activity is focused toward a single objective.

With a revenue goal in mind, you can begin to look at how this breaks down in terms of how leads need to be sourced and how many marketing-qualified leads should be passed to Sales. Breaking down and clarifying these numbers sets department expectations early and helps Sales and Marketing to focus their activity so that it is goal-oriented and productive.

Don't just stop at the numbers. Does Marketing need to be creating a set number of articles and providing them to Sales who in turn need to distribute them? Do both departments need to be ensuring that feedback is documented so that the handover remains smooth?

Every team involved in the SLA should meet each month to review results and update goals, keeping the business informed and highlighting challenges or obstacles that might be impeding the generation of leads that close.

4. Document your lead handover process

So a lead has been qualified by marketing and it's time for the sales team to have a conversation with them. What next?

Without a well constructed handover to Sales and a process for subsequent feedback, your leads could mean nothing. This is the most common moment that they will become leads that *don't* close. None of us want that.

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5. Agree what happens to leads after they are handed over

Documenting what should happen to a lead once it is handed over to Sales neatly side-steps one of the biggest sources of conflict between Marketing and Sales.

Once a salesperson picks up an MQL, they need to qualify it themselves in order to decide what happens next. We typically advise that the sales team put a contact into one of three teams after they have spoken to them:

- **Advance.** This person is a great fit and the time is right, making them an SQL. At this point, we'd book a follow-up call to further qualify them as an opportunity.
- **Nurture.** They're a fit for us, but the timing isn't right so they should be nurtured for the future.
- **Disqualify.** No fit or timing.

Make sure that Sales has the systems in place to mark them as one of the following so that Marketing can see the progression of leads. Don't forget to define what needs to be done if the lead goes to nurture or disqualify. Who is going to nurture them? Do they need deleting from the CRM? (Save yourself the headache of a frustrated marketing department that has found out Sales has been deleting all of its blog subscribers because they were disqualified, even though they may well be a good referrer.)

6. Analysis and review

Your SLA and alignment piece will define the key performance indicators for understanding the effectiveness of your revenue generation. As a result, this will always need to be reviewed to see whether any amendments need to be made.

Once you have the process in place, make sure you can track and measure it in order to make assessment straightforward. This will then be able to highlight performance issues and opportunities for improvement in both departments.

Set up a meeting for a review of the process and how sales and marketing are finding it at appropriate periods of time. Many companies will review this every six months, although if they are going through a high-growth phase this may need to be quarterly.

This kind of closed loop reporting is crucial to the smooth running of your lead generation process. Most importantly, over time it will enhance the number of leads generated that close as both teams work well together to meet that end goal.

CONCLUSION: HOW TO GENERATE LEADS THAT CLOSE

BabelQuest was formed as we believed that businesses need to focus on generating leads that close if they want to grow in a predictable, scalable, and repeatable way. Central to delivering on this promise is the understanding that beneath the strategies, the technology, and the implementation of sales and marketing activity, we're working to start conversations between our clients and their customers. It's as simple and as complex as that.

Now more so than ever before, communication is everything.

You research your buyer personas to better communicate with your target buyers. You identify where they are in the buyer's journey to communicate with them in the most appropriate way. You define your proposition and messaging to better communicate your brand. Your content is the vehicle that facilitates all of this: it's your stories, your values, and your company's voice, told through articles and infographics and engaging video. Distribution is your conversation starter, a confident wave to the right people across a crowded room filled with noise.

By listening to your buyers, you can optimise the kinds of conversations your business is having, while marketing automation technology makes the process of having these conversations at scale easier and more cost-effective. Finally, it is through clear communication that two traditionally disparate business units like Sales and Marketing can come together to work toward the same goal of generating more leads that close. How do they do this? They start conversations with their target buyers to better qualify them and nurture them towards closing.

If we can summarise our goal in three words, then we can communicate the means to achieving it in two: *meaningful* conversations.

Start having more of them, and see how your business grows.