Marketo®

THE DEFINITIVE GUIDE TO LEAD GENERATION

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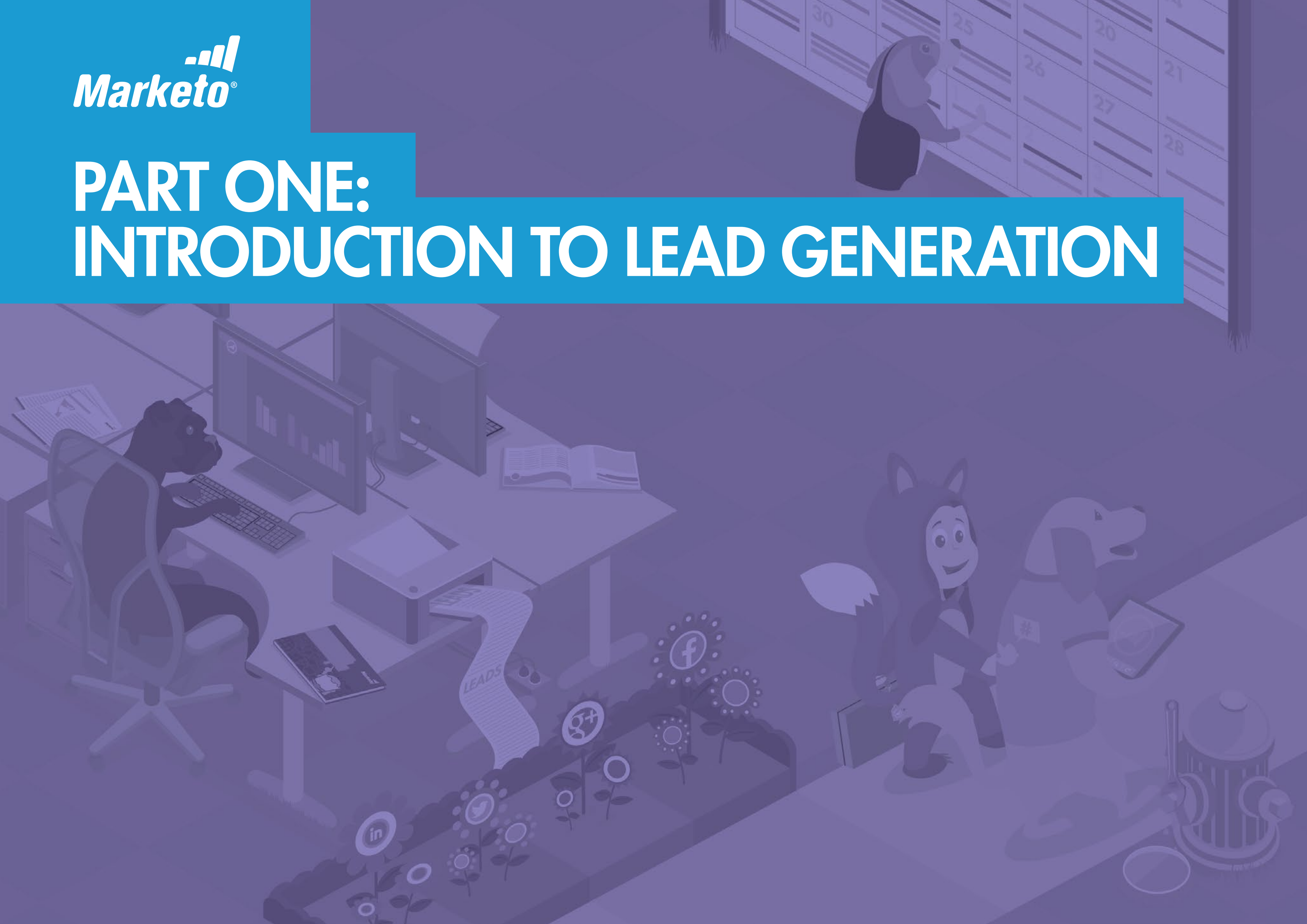
PART ONE: INTRODUCTION TO LEAD GENERATION



CHAPTER ONE:

WHAT IS LEAD GENERATION AND WHY IS IT IMPORTANT?

LEAD GENERATION DEFINED

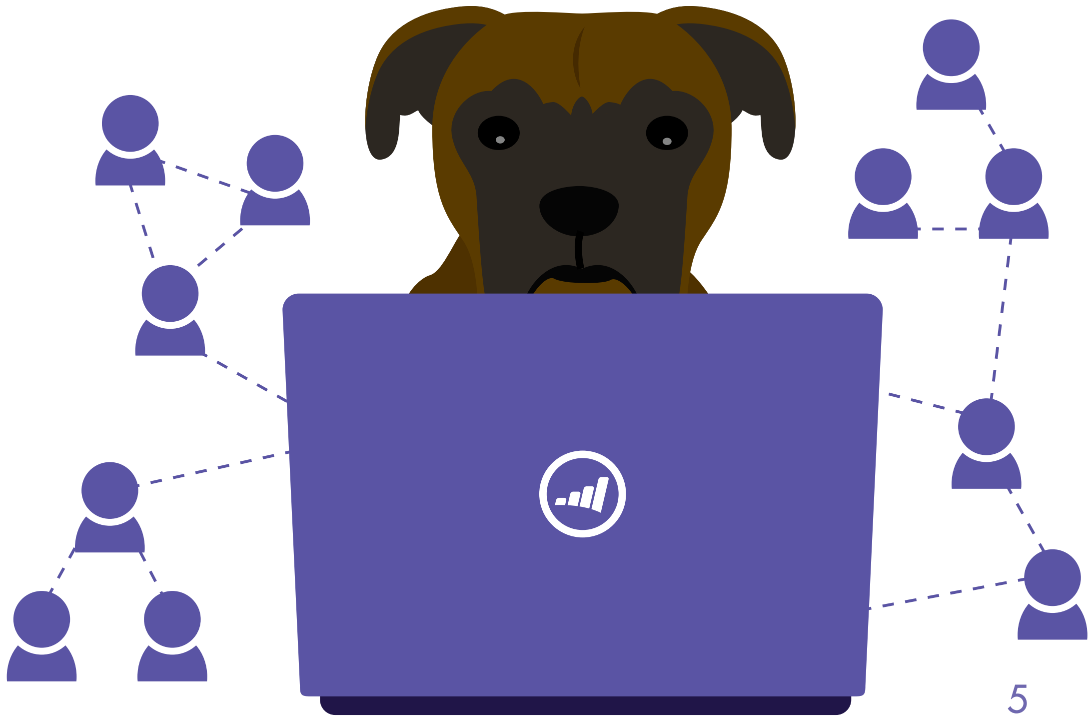
Lead generation describes the marketing process of stimulating and capturing interest in a product or service for the purpose of developing sales pipeline.

In today's complex marketing climate, lead generation has become a popular strategy to help create demand and get your marketing messages heard across multiple channels. Lead generation helps your company increase brand awareness, build relationships, generate qualified leads, and ultimately close deals.

Through the various lead generation tactics mentioned in this guide, a company can collect the contact information of potential targets in order to nurture them to eventually become customers. Lead generation is useful for all types of businesses, both small and large, and in both B2B and B2C companies—such as financial services, healthcare, and automotive organizations.

Lead generation strategies that are discussed in this guide include:

- Content marketing and blogging
- Website and SEO
- Social media
- Pay-Per-Click (PPC) advertising
- Content syndication
- Direct mail
- Telesales
- Email marketing
- Lead nurturing and lead scoring
- Testing and optimization
- Lead generation metrics



WHY IS LEAD GENERATION IMPORTANT?

If you can generate quality leads for sales, you make their job easier—and more of your leads will be turned into revenue faster.

Just because someone downloaded a whitepaper doesn't mean he or she wants to talk to a sales rep. You don't want your sales teams wasting time cold calling from a list of unqualified leads. Simply put, cold calling doesn't work in today's world of information abundance. You want your sales team closing deals and spending time actively selling, instead of wasting time calling down a list of cold leads.

Lead generation can help your sales teams spend more time selling and less time with administrative tasks and prospecting, because you are giving them warm, well qualified leads. In fact, according to a recent benchmark study by Marketo, companies with mature lead generation practices achieve better sales productivity and higher revenue growth.

Mature companies achieve 133% greater revenue versus their plan than average companies, and 174% more than the least mature companies. Additionally, sales reps at mature companies spend 73% of their time selling (rather than on administrative tasks, training, etc.). At companies without mature lead generation strategies, sales reps spend only 57% of their time selling.

If you can generate more leads for your sales team, not only are you helping your company grow, but you are also helping marketing's credibility. You are no longer seen as a cost center, but as a viable part of the revenue team.

CHAPTER TWO:

HOW HAS LEAD GENERATION EVOLVED?

TRANSFORMATION OF LEAD GENERATION

Traditional lead generation has undergone substantial changes in recent years, thanks to new online and social marketing techniques. In particular, the abundance of information readily available online has led to the rise of the "self-directed buyer" and the emergence of new ways to develop and qualify potential leads before passing them to sales.

In the age of the self-directed buyer, marketers need to find new ways to reach their potential customers and get heard through the noise.

Instead of finding customers through mass advertising and email blasts, marketers must now focus on being found, and learn to build enduring relationships with buyers. This massive shift has sparked a huge transformation in marketing.

THEN		NOW
	Mission	
Represent the company		Representing customer
Finding customers		Being found
	Customer Intelligence	
Mass advertising		1:1 Targeting
Demographic		Behavioral
	Mechanics & Tactics	
Point in time blasts		Continuous relationships
Few/isolated channels		Exploding/integrated channels
	Measurement	
3rd party data (Nielsen)		Owned, big data
Intuitive decision making		Fact-based decision making

Marketing's mission, intelligence, tactics, and metrics have drastically changed.

TRANSFORMATION OF LEAD GENERATION

Information Abundance and Attention Economics

With the rise of the internet, we've left the world of information scarcity behind, and entered one of information abundance.

In fact, according to Google chairman Eric Schmidt, five exabytes (or five billion gigabytes) of information were created between the dawn of civilization and 2003, "but that much information is now created every two days, and the pace is rapidly increasing."

The problem is that information abundance equals attention scarcity. This is known as "attention economics". Social scientist Herbert Simon was the first person to discuss this concept, writing that "in an information-rich world, the wealth of information means a dearth of something else: a scarcity of whatever it is that information consumes. What information consumes is rather obvious: it consumes the attention of its recipients."

This has transformed the buying process—and therefore the lead generation process. Buyers are overwhelmed by all of the noise, so they are learning to ignore the messages they don't want to hear, and to independently research what they *do* want to know.

> "The attention economy is not growing, which means we have to grab the attention that someone else has today."
> **– Brent Leary, Co-Founder, CRM Essentials**

Unprecedented Changes in Buying

The shift from information scarcity to information abundance has changed buying behavior – and shifted power to marketing.

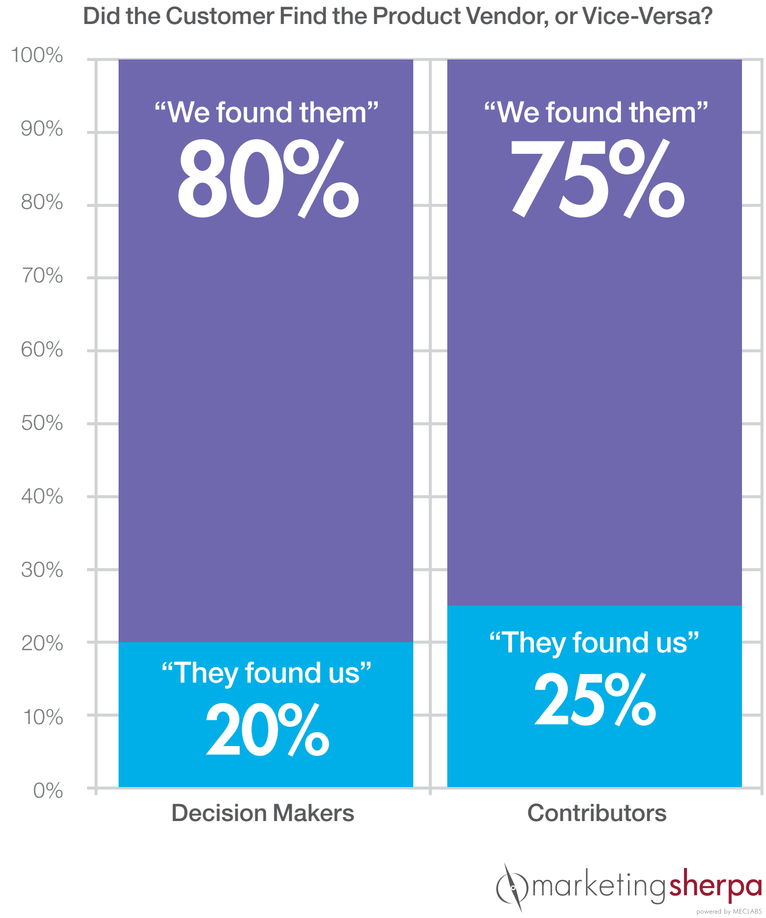
TRANSFORMATION OF LEAD GENERATION

The New Buying Process

In the old world of information scarcity, "lead generation" meant that marketing found the names of potential buyers early on in their buying journey, and then passed those names directly to sales. Buyers expected to be educated by the sales team, and sales expected to speak to uneducated, early-stage buyers who weren't always qualified.

Today, a variety of educational resources are easily found through search engines, social media, and other online channels. Through content produced and distributed by organizations, today's buyer can learn a great deal about a product or service before even speaking to a salesperson.

This makes your digital presence more important than ever. Both decision makers and influencers are now most likely to find you—before you find them.



Today, customers are more likely to "find" product vendors than vice-versa.

Source: Business Products Buyers Survey, March 2007
Methodology: Fielded in March 2007 to SSI's Business to Business Panel. N=478

According to Forrester, buyers might be anywhere from two-thirds to 90% of the way through their buying journey before they contact the vendor, making it difficult for sales to influence the buyer's decisions. Buyers can now delay talking to sales until they are experts themselves.

Luckily, a solid lead generation strategy will help you build trust and capture the interest of your buyers during the self-education process, and before they're ready to contact sales.

In this guide we will cover:

- How to define a lead and his or her buying journey
- How to build a robust lead generation strategy through marketing automation
- How content marketing, social media, your website, search engine optimization, and paid programs contribute to lead generation
- How to use Middle-of-Funnel (MOFU) marketing to build enduring customer relationships
- How to test, optimize, and measure your lead generation campaigns

CHAPTER THREE:
DEFINING A LEAD

WHAT IS A LEAD?

To build out your lead generation strategy, you need to start with the basics. Every organization will have their own definition of a "good lead". If you don't know yours, lead generation 101 is where you need to begin.

There are many definitions of a lead, and there are even more definitions of a "good lead". According to Marketo, in our own revenue cycle, a lead is "a qualified prospect that is starting to exhibit buying behavior".

Craig Rosenberg, sales and marketing expert and author of the Funnelholic blog, states that "there are two elements to a lead—demographic and psychographic. When it comes to the psychographic element, your definition of a lead will depend on your company, where you're selling, and who you're selling to."

Easy enough. But a company's definition of a lead is not often agreed on by both sales and marketing. How do you come to an agreement? Simply put, the two teams need to meet and have a discussion until they can agree—*the success of your lead generation efforts depends on it.*

Sales and Marketing Lead Alignment Checklist

Here's how sales and marketing can create a universal lead definition that is agreed upon by both teams:

1. **Schedule some time to meet.** Get all of your key stakeholders in a room and pick each other's brains.
2. **Ask the hard questions.** For marketing, what does your target market look like? Who do you have in your system, and what are they engaging with? For sales, what prospects are you speaking to? What types of buyers are closing?
3. **Decide how good is "good enough".** Set a base level. What does marketing consider a good enough lead to get passed to sales? Conversely, what does sales think is a lead worth following up on?
4. **Get the flip side of the story.** What does marketing consider a bad lead? And what does sales consider a lead not worth their time?
5. **Agree on a definition and write it down.** Now that you have your definition, write it down and abide by it. Add it to your marketing automation system, post it up on walls—do whatever is necessary to keep both teams on point.
6. **Iterate your definition over time.** Meet regularly to review this definition. You should be iterating and changing your definition as your company grows and priorities shift.

WHAT IS A LEAD?

Demographics

When profiling your leads, you need to look at demographics—quantifiable identifiers which characterize your lead population. Typical demographic attributes for both B2C and B2B can consist of the following:

- Gender
- Title
- Company
- Years of experience
- Personal email vs. corporate email
- Education (B2C)
- Age (B2C)
- Income (B2C)

Firmograhics

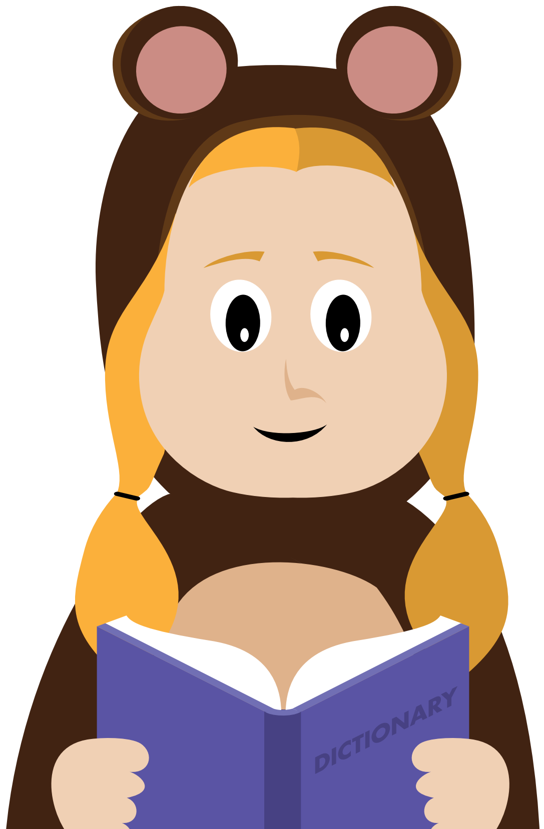
Firmogaphics, which are used as criteria by B2B companies, are organizational characteristics which help you find your ideal customer organization, e.g.:

- Name of company
- Company size
- Company location
- Revenue
- Number of divisions
- Number of products/services sold
- Geographic markets served
- Industry
- Products already owned

BANT

You can also often determine a prospect's place in the buying process by analyzing his or her BANT (Budget, Authority, Need, and Timeline) attributes. BANT is a more advanced lead qualification practice than demographic and firmographic analysis alone.

- **Budget:** Can this lead afford your product or service?
- **Authority:** Does your lead have the authority to purchase your product? Is he or she the decision maker?
- **Need:** Your lead has to need your product or service. Is there a pain that your product or service can solve?
- **Time:** What is your lead's purchasing timeframe? And does that align with your sales cycle?



WHAT IS A LEAD?

Lead Handoff

Just as sales and marketing must agree on the definition of a lead, they must also agree on lead handoff—when that lead gets sent to sales. This ensures a seamless transition from marketing to sales, and immediate follow-up on hot leads.

Lead Stage Definition

To agree on lead handoff qualifications, your sales and marketing teams must define together the two main categories of lead stages: Marketing Qualified Leads (MQLs) and Sales Qualified Leads (SQLs).

- **Marketing Qualified Leads (MQLs):** These prospects are considered viable marketing leads, taking implicit scoring criteria, explicit scoring criteria, and (if available) BANT (Budget, Authority, Need, and Timeline) into consideration.
- **Sales Qualified Leads (SQLs):** These leads are sales-ready, which often must be determined through direct contact with sales. Once sales has tested to determine the qualifications of an SQL, marketing can use that data to improve MQL quality.

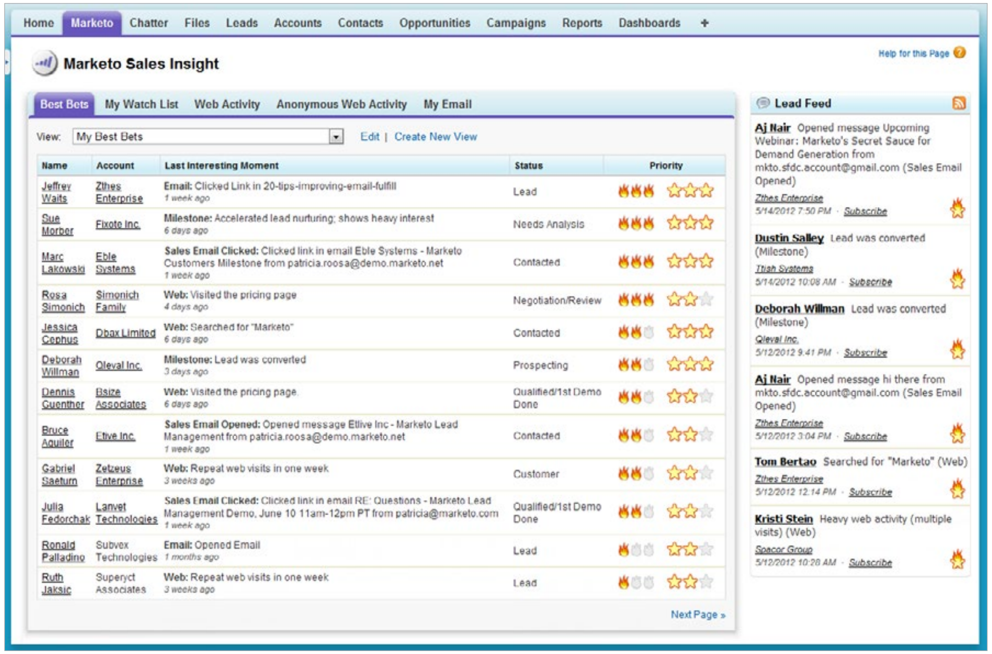
Sales Notifications

Once a lead hits a certain score threshold in your marketing automation tool, your lead becomes an MQL and your inside sales lead qualification team should be notified to make contact. Because marketing automation tools sync with many customer relationships management tools (CRMs), this data can be transferred directly into the lead record in a CRM.

CRM-compatible tools like Marketo's Sales Insight offer a tightly integrated way to notify sales about lead activity. The Sales Insight dashboard highlights the best leads and opportunities for sales to focus on, has icons to indicate urgency and key activities, and tracks interesting behavior that indicates hand-raising.

Also consider using "Act Now" scores, which elevate leads to "Act Now" status when they engage in activities that indicate buying intent. At Marketo, these include:

- Filling out a free trial form
- Filling out a "Contact Us" form
- Downloading key late-stage content
- Viewing a weekly live demo
- Viewing a "deep dive" demo



Marketo's Sales Insight dashboard, showing lead activity and score.

WHAT IS A LEAD?

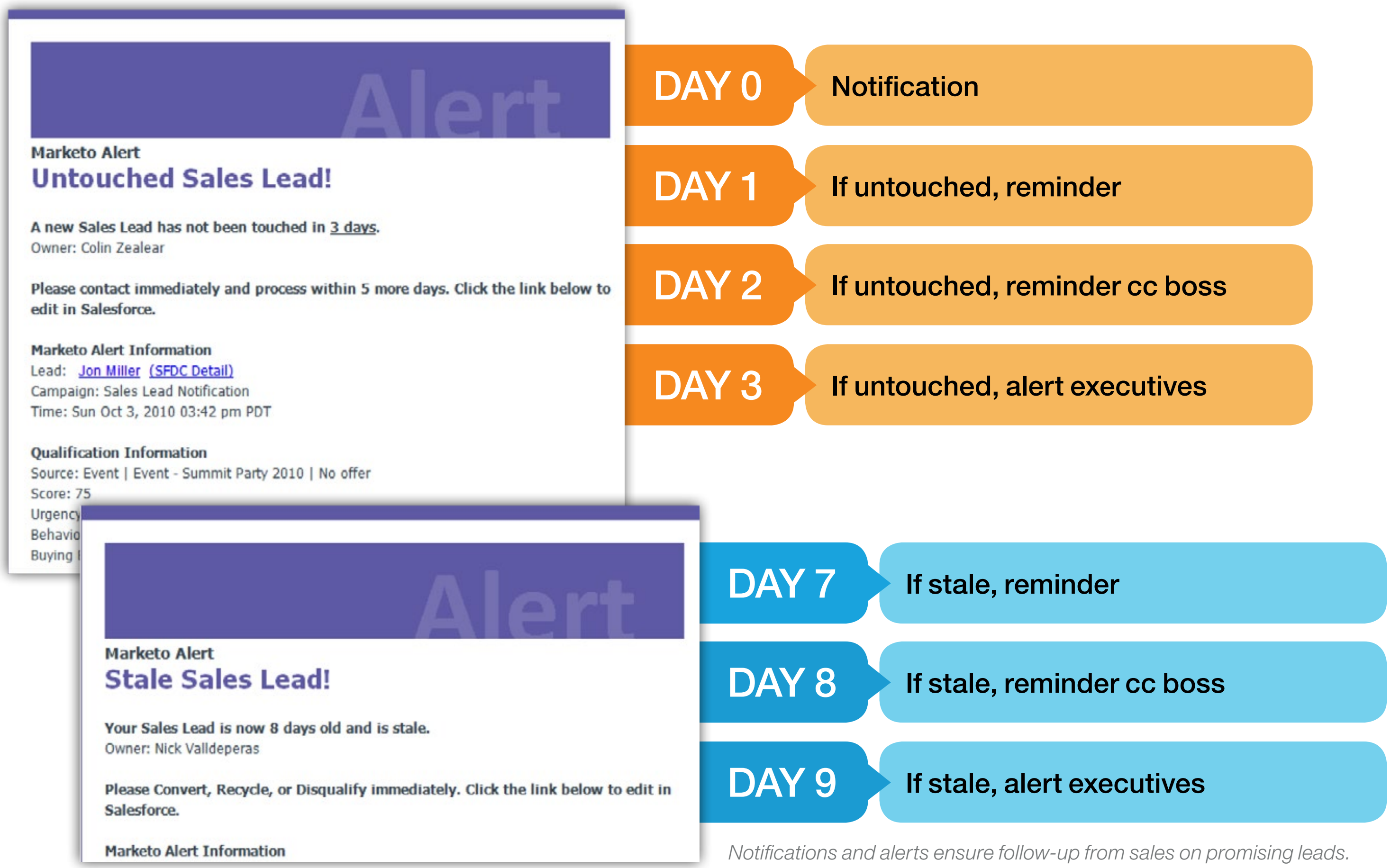
Service Level Agreements (SLAs)

Once you've agreed upon the lead lifecycle and handoff process, how can you ensure that sales follows through on your hot leads? At Marketo, we have implemented Service Level Agreements (SLAs) between sales and marketing to ensure proper follow-up.

SLAs are written agreements between sales and marketing, ensuring closed loop lead processing by indicating specific timeframes for follow-ups. If a lead is not followed up on within the indicated timeframe, an alert is sent to a sales rep's boss, and ultimately to the executive team.

A critical element to note:
SLAs only work when sales is heavily involved in the process and champions the SLAs internally.

Take a look at an example of how we have implemented SLAs:



Notifications and alerts ensure follow-up from sales on promising leads.

ASK THE EXPERTS: WHAT IS A LEAD? Q&A WITH TRISH BERTUZZI, PRESIDENT & CHIEF STRATEGIST, THE BRIDGE GROUP

MKTO: What are your top tips for sales and marketing alignment?

TB: To truly get serious about sales and marketing alignment, you have to measure the leaders of both teams on the same goal—revenue. Not all personnel on the marketing team need be 100% revenue-focused, but whomever is "large and in charge" should have the same compensation plan as the VP of Sales. Live and die by the revenue sword, baby!

On the flip side, sales leaders need to belly up to the bar. Assume that only 50% of your pipeline (at maximum) will ever come from marketing efforts. What's your strategy for making up the rest of that pipeline? Figure it out, get your reps executing against the strategy, and stop pointing fingers at marketing!

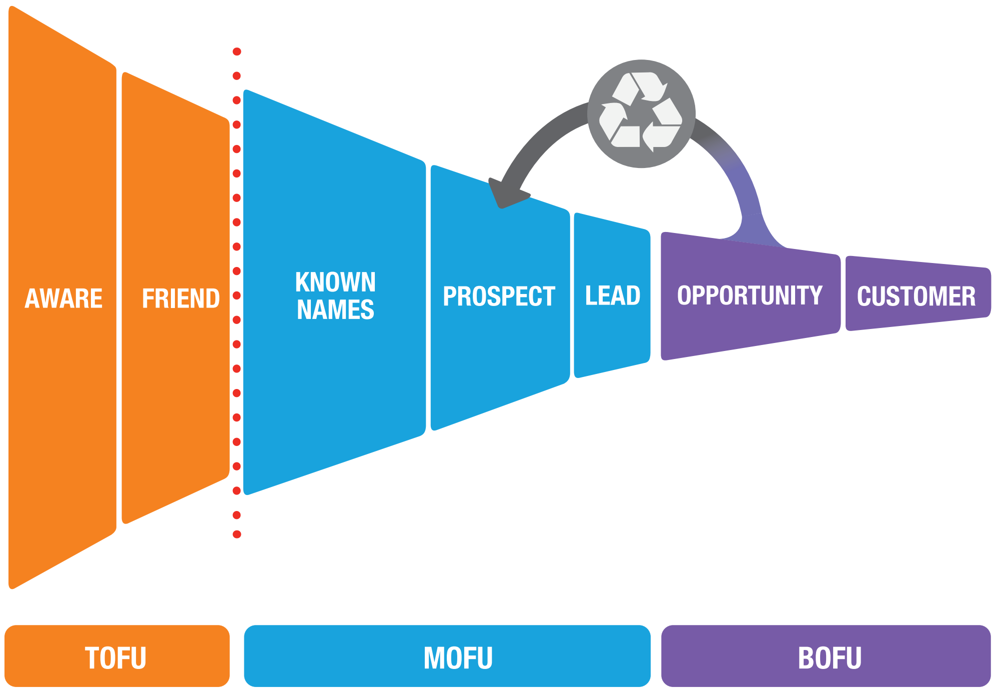
MKTO: How should sales and marketing agree upon lead definitions?

TB: This will never happen, but it is my dream scenario: first, sales and marketing executives should get together and create lead definitions. Next, they should each grab a list of 100 companies and put them through the qualification process—I'm not talking about the reps, here, but the execs themselves. Then, based on the real world output they have created, they sit back down to re-examine their lead definitions. How awesome would that be?

MAPPING LEAD GENERATION STRATEGIES TO YOUR FUNNEL

The next step is to understand your lead's buying journey. Revenue funnels may vary between companies, but we'll use Marketo's funnel to show how buyer intent and campaigns can be mapped to different stages.

At Marketo, we break our funnel up into three parts: Top-of-Funnel, Middle-of-Funnel, and Bottom-of-Funnel. *(Note that a lead only enters our database after they cross the red dotted line.)*



Top-of-Funnel (TOFU)

A person in this buying phase is at the beginning of your sales and marketing funnel, and is aware of your product or service but is not ready to buy. Individuals in the TOFU stage should be primarily offered educational materials.

We break the TOFU stage down into three sub-stages:

- **Name:** This indicates an individual whose name has officially entered our database—but names are just names, not leads. Names are not yet engaged with our company—just because they dropped their business cards in a fishbowl at an event doesn't make them actual leads.
- **Engaged:** We don't move names into the next stage until they have had a meaningful interaction with us. Engaged individuals know they are in our system, and they expect us to email and communicate with them over time.
- **Target:** Once an individual has engaged, we use our lead scoring to find out whether they are a qualified potential buyer—which means they fit our demographic and behavioral criteria.

CHAPTER THREE: DEFINING A LEAD

MAPPING LEAD GENERATION STRATEGIES TO YOUR FUNNEL

Middle-of-Funnel (MOFU)

This buying phase occurs in the middle of your sales and marketing funnel. A person arrives here after he or she has displayed buying behavior, engaged with your content, and is potentially a sales lead. Your offers for MOFU leads are still educational, but they will be more geared towards your product or service—in Marketo's case, buying guides or ROI calculators.

We break the MOFU stage down into two sub-stages:

- **Lead:** This stage is where a target actually becomes a lead. At Marketo, we score our targets using Marketo's lead scoring capabilities. When our scoring suggests that it's time to reach out, we connect with them personally. Once an SDR (Sales Development Rep) has a conversation with them, we convert them into an official sales lead. And if they are not yet ready to buy, we can recycle them back to the target stage for more nurturing.

Note: the majority of leads are not sales ready. This doesn't mean the SDR's conversation was a waste of time—human interaction is an important part of developing (or nurturing) the relationship.

- **Sales Lead:** If leads are qualified buyers, the SDR then passes them to an AE (Account Executive). That sales rep has seven days to either turn the sales lead into an opportunity and have a sales interaction, or to send that lead back to marketing for more nurturing.

Bottom-of-Funnel (BOFU)

This buying phase occurs at the bottom of your funnel, and indicates that your lead is close to becoming a customer. Your offers for BOFU leads are very specific to your product or service—think datasheets and pricing guides.

We break the BOFU stage down into two sub-stages:

- **Opportunity:** At Marketo, only sales reps can create opportunities. Leads in this stage are sales accepted and are actively being worked by sales. In fact, opportunities are how both our marketing department and SDRs get paid. We actually maintain an opportunity quota to make sure enough opportunities are created each period. Note: if people are paid based on opportunity creation, opportunities require a very solid, agreed-upon definition. They can not be subjective.
- **Customer:** Lastly, we have the customer stage! These are closed-won deals.

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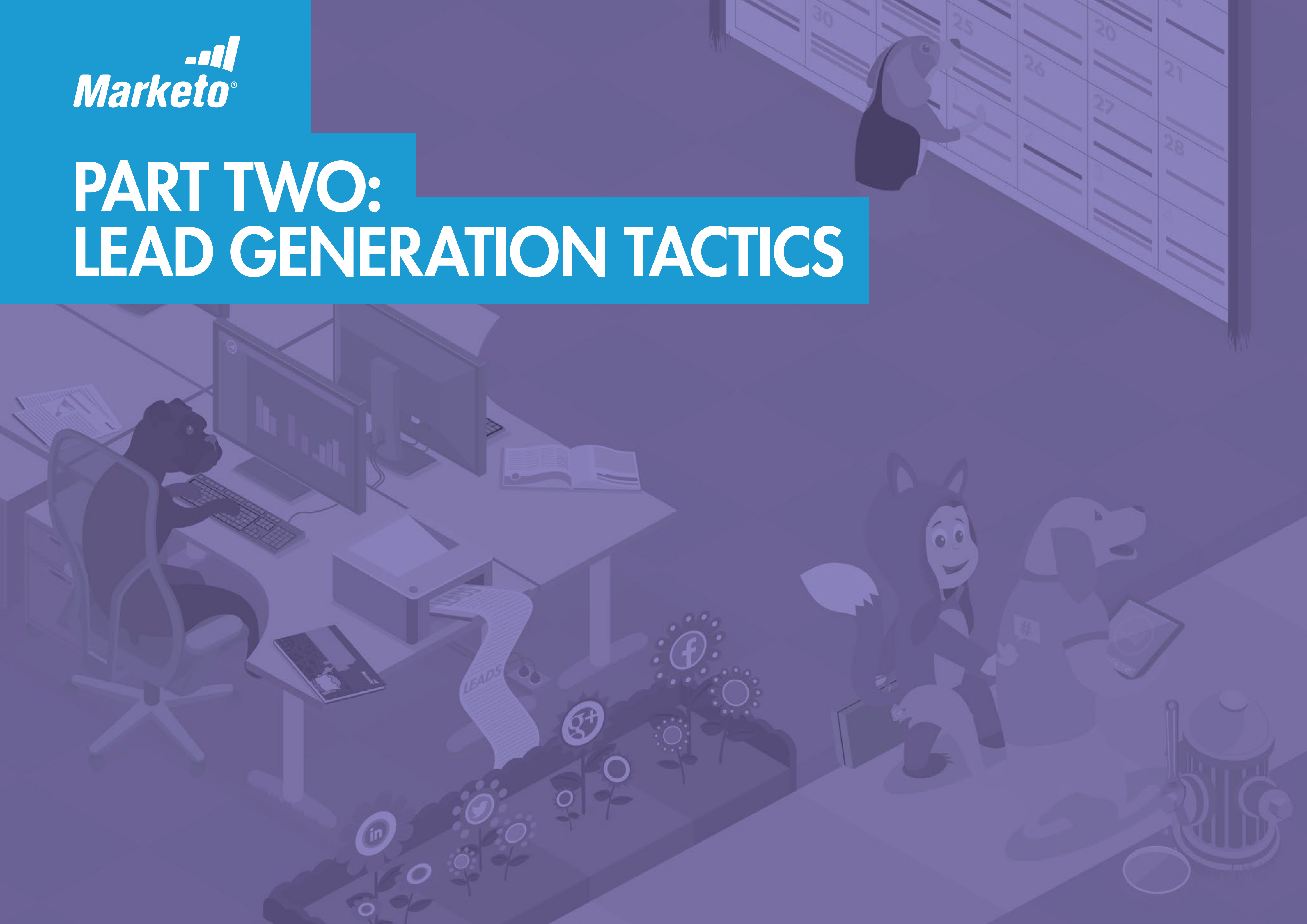
PART TWO: LEAD GENERATION TACTICS



CHAPTER FOUR:
CONTENT MARKETING

WHY IS CONTENT MARKETING IMPORTANT?

Content is the foundation of your lead generation efforts. The Content Marketing Institute defines content marketing as "the marketing technique of creating and distributing relevant and valuable content to attract, acquire, and engage a clearly defined and understood target audience—with the objective of driving profitable customer action".

Think of content as the fuel for all of your marketing campaigns—from email to social to event collateral.

Marketers have come to rely on content to engage prospects and customers in today's new buyer landscape. You must create content that educates, inspires, and begs to be shared. It should help leads overcome challenges and achieve their aspirations. If you are able to do that, leads will flock to you, and you'll gain their trust. Trust is ultimately what creates customers out of leads.

> "Customers are now smarter, more connected, more informed, more influenced and influential socially, and less likely to respond to campaign-bait. Marketing has to create content people actually want."
>
> **– Tim Barker, Chief Product Officer, DataSift**

What Form Can My Content Take?

Content is more than just ebooks. It can come in many forms, so think outside of the box!

- Articles
- Blog posts
- Case studies
- Cheat sheets
- Checklists
- Ebooks
- Email
- Infographics
- Kits
- Large definitive guides
- Podcasts
- Reference guides
- Slideshares
- Surveys
- Templates
- Videos
- Visual content
- Webinars
- Whitepapers
- Workbooks

WHY IS CONTENT MARKETING IMPORTANT?

When used effectively, content marketing can:

- Shape a brand preference and influence future purchases
- Generate social media shares and inbound links
- Put customers in the driver's seat
- Help fuel search engine optimization (SEO) efforts
- Increase brand awareness
- Generate quality leads for less money (when compared to more traditional marketing)

Ask the Experts:

What is the biggest mistake marketers make in their content marketing strategy?

"A lack of formal business strategy around content. Right now, most marketers are filling content buckets, and lack a true business objective (such as revenue, cost savings, or customer loyalty) behind their content initiatives.

Secondly: patience. Most brands still call content marketing a campaign, which implies there is a stop date. Content marketing is a marathon, not a sprint. We need to take a longer-term view of how we communicate with our customers."

– Joe Pulizzi, Founder, Content Marketing Institute

"The biggest mistake is to create content that your boss or client loves, but your customer doesn't. If your customer loves your content, that means it's meeting the needs of the people you are trying to reach, which your boss or client will love by default. But the inverse isn't true. If your boss/client loves it, but the customer hates it...well, who cares? Ask yourself: What would your content look like if your customer signed your paycheck?"

– Ann Handley, Chief Content Officer, Marketing Profs

THOUGHT LEADERSHIP VS. PROMOTIONAL CONTENT

At the outset of your content planning, it's important to make a distinction between promotional content and thought leadership. Thought leadership demonstrates a deep understanding of your prospects' and customers' pain points, and guides them toward solutions.

Any vendor can publish feature-focused brochures and other product-related content. But the trusted vendors—the ones that rise above the noise—are those focused on helping their target audience. Buyers naturally gravitate toward these vendors.

At Marketo, we create content that is simply meant to help people become better marketers. We also try to create assets that educate our audience about marketing automation as a platform, and how it can help marketers be more effective at their jobs. Instead of constantly pushing sales messages to our leads, we want to teach people the benefits of investing in marketing automation.

So while we are talking about our core competency—marketing automation—we are educating our audience with thought leadership, rather than pushing our solution.

Content Marketing CTAs

That said, even educational content should have a strong, clear, call-to-action (or CTA). What is a CTA? It's the part of your marketing message that should persuade people to act. Your standard CTA might ask the reader to subscribe to your blog, download another ebook, or to sign up for a demo.

Regardless of what your ask is, your CTA must:

- Stand out
- Clearly define what you want the lead to do
- Create urgency
- Be positioned in a prominent area

ASK THE EXPERTS: CONTENT MARKETING

WHAT DOES THE FUTURE OF CONTENT MARKETING HOLD?

"Marketing departments will continue their transformation into mini-publishers. Analytics and data will be critical, but knowing more about our customers' consumption habits will create a more complex need for useful content. The majority of journalists will be hired by non-media companies. We will start to see non-media companies buy up smaller, niche content titles in both digital and print form."

– Joe Pulizzi, Founder, Content Marketing Institute

"I think it'll look less like a separate thing—'content marketing'—and more like, well, marketing! The future of all marketing is in programs that are useful, honestly empathetic, inspired, and based on data or creative insights. To quote my friend Tom Fishburne: 'The best marketing doesn't feel like marketing.' And that's the place where I think all organizations will eventually end up."

– Ann Handley, Chief Content Officer, Marketing Profs

THE CONTENT PLANNING PROCESS

Like any element of your marketing, you shouldn't dive into content marketing without a strategy. Content marketing isn't about creating content for its own sake—it's about engaging prospective buyers. To do that effectively, you need a plan that reflects your goals, an understanding of your target audience's top concerns, content ideas that align to these concerns, and a calendar for developing content on an ongoing basis.

Creating Your Personas

The first step is to create your buyer personas—most brands will need more than one. A buyer persona can be defined as a representation of your ideal customer. Personas are developed based on customer demographics and behavior, along with your own understanding of their motivations and challenges.

Buyer personas help you:

- Determine what kind of content you need
- Set the tone, style, and delivery strategies for your content
- Target the topics you should be writing about
- Understand where buyers get their information and how they want to consume it

Conducting Interviews and Research

To create your buyer personas, you should conduct interviews with customers, prospects, and members of your sales and customer service teams. You can also send out surveys and do your own research.

Focus on the following topics when creating each persona:

- **Background:** Basic details about your ideal customer and his or her company
- **Job details:** Key job responsibilities, likes and dislikes about job
- **Main sources of information:** Where your persona does his or her research
- **Goals:** Persona's primary and secondary goals
- **Challenges/pain points:** Your persona's challenges, and the emotions which accompany those challenges
- **Preferred content medium:** How your persona likes to absorb content
- **Quotes:** Bring your personas to life with actual quotes gathered during interviews
- **Objections:** The objections you anticipate from your persona during the sales process
- **Role in purchase process:** Persona's influence in the decision making process
- **Marketing message:** The messaging that speaks directly to this persona

THE CONTENT PLANNING PROCESS

Mapping Your Buying Stages

Now that you've defined your personas, you need to create a buying journey that will convert these personas into customers. A buying journey maps a buyer's decision making process during a purchase. Mapping this allows you to:

- Understand the process your buyers go through when considering your product or service
- Develop a content strategy that speaks directly to buyers, regardless of their stage in the buying journey

Here's a great example of a buyer journey template, created by Sales Benchmark Index:

BUYING PROCESS MAP

BUYING PHASE	NOT IN THE MARKET	STIMULATED	PROBLEM DEFINITION	OPTIONS	EVALUATION	PREFERRED RECOMMENDATION	FINAL APPROVAL	IMPLEMENTATION
KEY BUYER ACTIONS	Observe Market Trends Track Competitive Activity	Event Occurs Problem Surfaces Problem Studied Consequences of Problem Identified Is it worth solving Can it be solved What Options are Available	Indentify and involve stakeholders Research possible options Establish functional requirements Draft ROI	Explore promising options Narrow down the list of options Reconfirm functional requirements Refine the business case	Conduct detailed evaluation of short listed options Secure stakeholder consensus about preferred option Finalize the business case	Finalize contractual and commercial terms Check references Reconfirm decision Finalize internal request to purchase	Submit final proposal to formal approval process	Implement chosen solution Achieve expected benefits Validate decision to buy

Sales Benchmark Index Buying Process Map

THE CONTENT PLANNING PROCESS

To map your own persona buying journeys, create a spreadsheet with a separate tab for each buying phase, and fill in the following items:

Buying Phase				
Actions & Questions	Buyer Action	Buyer Doing (Y/N)?		Questions Buyer Asks
Key Buyer Actions	Event Occurs		Event #1	
			Event #2	
			Event #3	
	Problem Surfaces		Problem #1	
			Problem #2	
			Problem #3	
	Consequences of Problem Identified			
	Consider Alternatives for Solving the Problem			
	Phase Exit Criteria			

Questions for each buying phase of a persona's buying journey

VISUAL CONTENT

As content marketing is more widely used, readers are becoming inundated with text. That's why visual content is such an important way to engage. At Marketo, we've found that good visual design can make even "copy-pasta" content stand out.

Make Every Piece Visual

Whenever possible, take your content to the next level with a visual element. You don't have to create custom illustrations for every ebook—just think about creating visual interest, whether it's with a custom cover or interior graphics.

Take a look at an example from a Marketo ebook on budgeting. Our topic—common marketing budget pitfalls—could have potentially been dry, but we jazzed it up with a compelling (and fun) design. With over 20,000 views, this content piece has done particularly well.

Marketo's Marketing Budget Pitfalls ebook

VISUAL CONTENT

Repurposing Content to Make it Visual

For a quick win, repurpose content you already have into something more visual. For instance, use content from an ebook to create an infographic or a slide deck. You might find that the visual asset is more shareable and easier to consume.

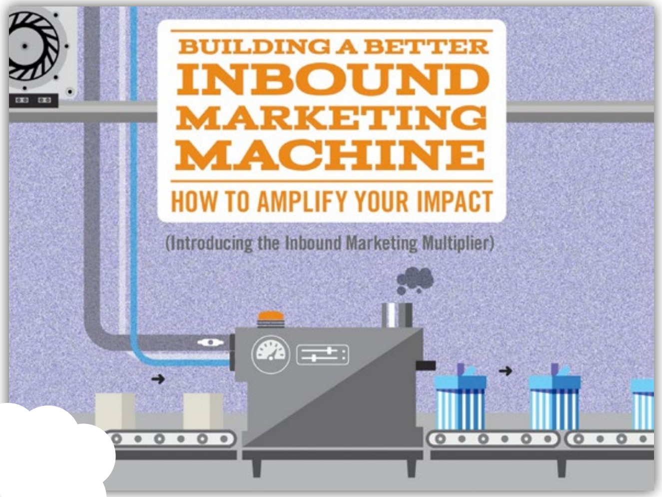
We took content from one of our ebooks, *Amplify Your Impact: How to Multiply the Efforts of Your Inbound Marketing Program*, and created a visual slide deck to promote on SlideShare.

As you can see, while the ebook got 13,000 views, the slide deck got a whopping 339,000 views on SlideShare!

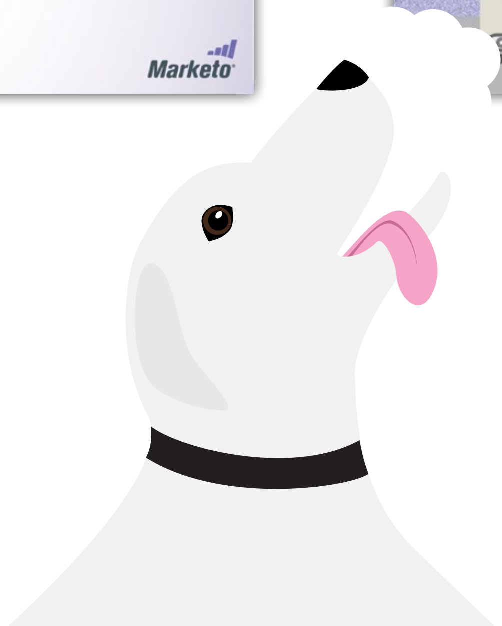
13,000
EBOOK VIEWS

VS.

339,000
SLIDESHARE VIEWS



Standard collateral vs. visual content



COMPANY BLOG

Your blog is a great resource for generating leads. Just remember that someone reading your blog may not want to immediately sign up for a demo—they may not even know what your product is—so aim for less ambitious calls-to-action (CTAs). Ask your readers to subscribe to your blog, or to follow you on social channels.

By opening the door to further conversation, you are taking the first step towards generating a quality lead. A well-executed blog will keep your readers interested, encourage them to come back for more, and eventually spark their curiosity about your company.

> "Don't focus on having a great blog. Focus on producing a blog that's great for your readers."
>
> – **Brian Clark**
> **Founder and CEO, Copyblogger**

The Top 3 "Do's" for Starting a Great Blog

Brian Clark, Founder and CEO, Copyblogger

1. Do understand who you're trying to reach. Start by thinking in terms of audience archetypes. This keeps you focused on quality content, which begins the sales cycle but doesn't make the customer feel "sold" to.

2. Do uniquely position your content. Think media first, not marketing. You're basically creating a digital magazine, but you're using a different business model than other media companies—you're selling your own products and services, not advertising.

3. Do create an initial content strategy and editorial calendar. You'll naturally adapt and revise both based on the real-time feedback you get, but you need a "best guess" approach based on your research. And don't forget you'll have to hustle to get attention until you've built an audience that will spread the word for you.

CHAPTER FIVE:
WEBSITE AND SEO

CHAPTER FIVE: WEBSITE AND SEO

WEBSITE FORMS

When it comes to converting leads and making lasting impressions, your website is where the magic happens.

KISSmetrics, an analytics and testing company, puts it best on their blog: "Your leads are only as good as the website that produces them".

They also provided these two compelling stats:

- You have 0-8 seconds to persuade your audience with your headline and landing page.
- Approximately 96% of visitors that come to your website are not ready to buy (but they may be willing to provide contact information in exchange for valuable content).

So how can you optimize your site for lead generation? Let's take a look.

Using Website Forms

You can't convert leads unless they fill out a form. A good lead capture form might ask for only first name, last name, email address, company, and job function. You can add more or fewer fields depending on your needs, but always err on the shorter side—with forms, less is more.

Why Short Forms Perform Better

When it comes to conversion rates, short forms outperform long forms. It's common sense—people don't want to waste time filling in information. But to prove our point, Marketo decided to perform an A/B test of short forms vs. long forms. We tested three form lengths—one with five fields, one with seven, and one with nine. The shortest form asked for name, work email, job function, and company.

The medium-sized form also asked for number of employees and industry; the longest form also asked for a work phone number, and which CRM system they used.

The results? As you'll see, the shortest form performed significantly better than the longer forms:

Short (5 Fields)
Conversion: **13.4%**
Cost per: **$31.24**

First Name: *	
Last Name: *	
Work Email: *	
Company: *	
Job Function: *	Choose One

Medium (7 Fields)
Conversion: **12%**
Cost per: **$34.94**

First Name: *	
Last Name: *	
Work Email: *	
Company: *	
Job Function: *	Select
# Employees: *	Select
Industry: *	Advertising

Long (9 Fields)
Conversion: **10%**
Cost per: **$41.90**

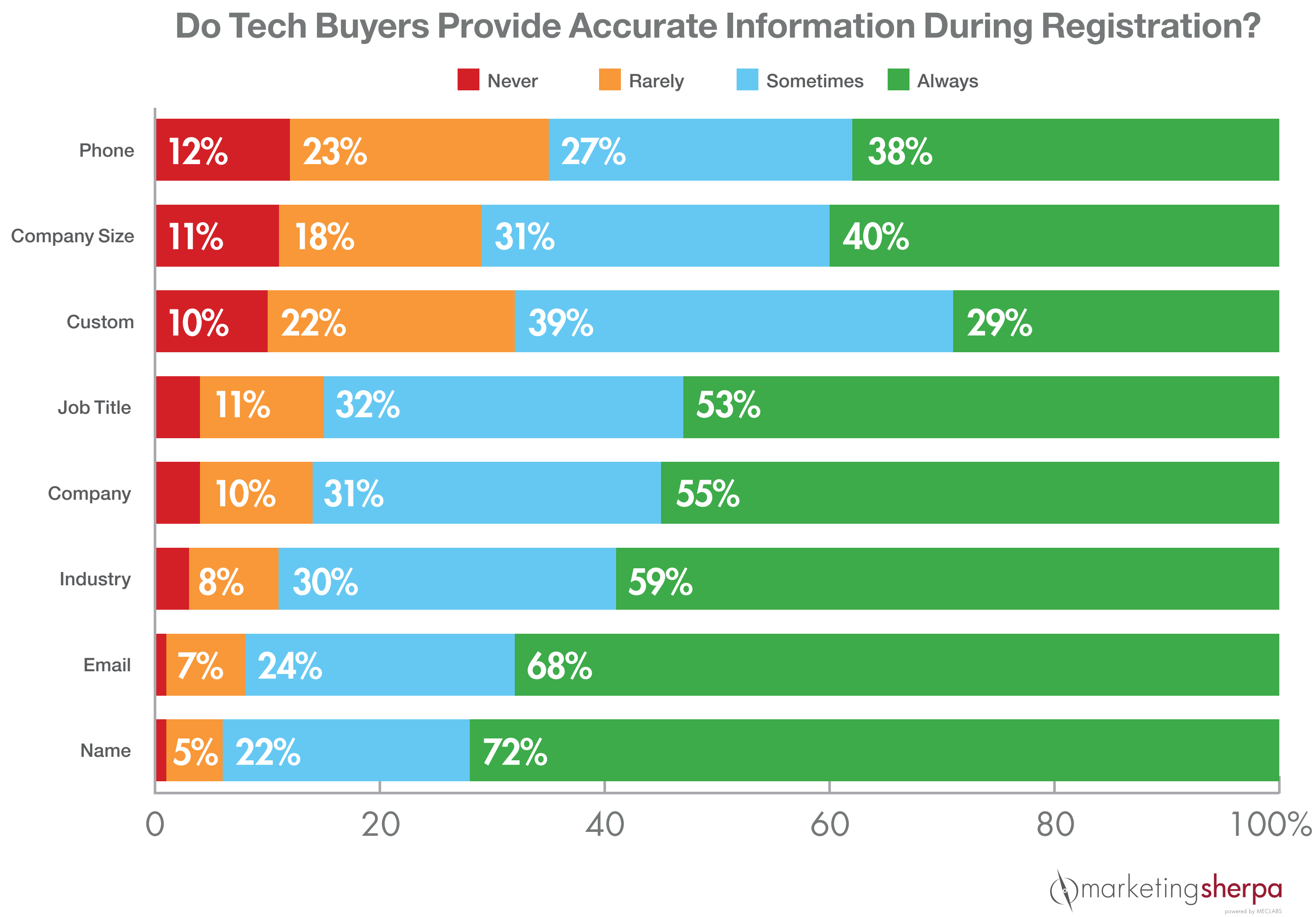
First Name: *	
Last Name: *	
Work Email: *	
Work Phone: *	
Company: *	
Job Function: *	Select
# Employees: *	Select
CRM System:	Select
Industry:	Advertising

Marketo's A/B test on conversion rates for short forms vs. long forms

WEBSITE FORMS

Although you may want a long form to feed your CRM, you'll be sacrificing leads in exchange for more data. And, as explained on the following page, you can still get additional data using other methods.

Another factor to keep in mind: the more information you ask for, the less likely people are to tell the truth. Take a look at this graph from MarketingSherpa, which highlights problems with self-submitted data. The more detailed information a lead fills out, the more likely he or she is to lie.



Source: MarketingSherpa and KnowledgeStorm. Connecting Through Content Phase III. August 2007. Methodology: N=2,700

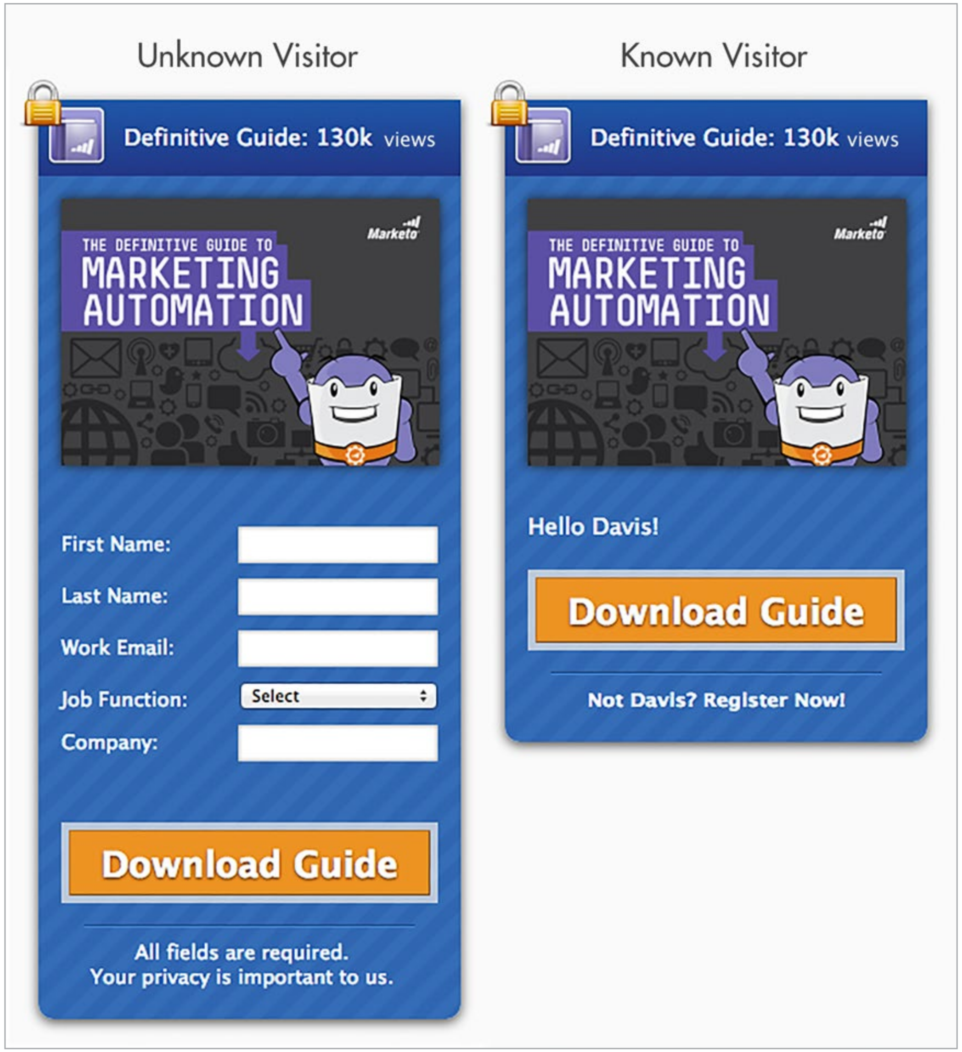
WEBSITE FORMS

Filling in the Blanks
Short forms may get you more (and more truthful) responses, but they might not provide the data you need to effectively segment leads in your marketing automation tool. A potential solution is to use progressive profiling. Progressive profiling—which is often supported by your marketing automation platform—allows you to collect information and build qualification over time. Each time a person fills out a form on your site, the progressive form asks for more information.

If you don't have the ability to use progressive profiling, carefully determine what you need on a form, as opposed to what you want—again, keep it short and sweet.
Another solution is to use data augmentation services, Marketo's Real-Time Personalization Platform, powered by Insightera, which can help you "clean" and augment your data. You may only have five fields on your form, but these services can fill in the blanks.

Extra-Intelligent Forms
The majority of Marketo's content assets are ungated, meaning there is no form fill-out required. On occasion, however, we create "Premium" content—this is content we use to directly gather lead data. Typically, this is Middle-of-Funnel content, like an analyst report, buyer's guide, or one of our flagship Definitive Guides. These are always marked by a lock icon—consistency is key.

That said, we don't need to put a form in front of visitors who are already in our database. To avoid repeat fill-outs, our intelligent forms consult the Marketo API, determining whether we already have contact information for a visitor. If we don't, they need to fill out a form before downloading a premium asset; if we do have contact information, we simply greet them, and allow them to download the asset with a single click.



Marketo's intelligent forms distinguish known from unknown visitors.

WEBSITE FORMS

Social and Landing Page Forms
Consider adding social sharing buttons to your web page forms. This increases the chance that a lead will engage with your content by sharing your landing page, and can expose your content to a wider audience. Many marketing automation platforms offer built-in functionality to add social sharing capabilities to landing pages.

Place your social share buttons in a prominent location and choose the social channels you include wisely—for simplicity's sake, consider including only the most popular ones.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Social Share Buttons

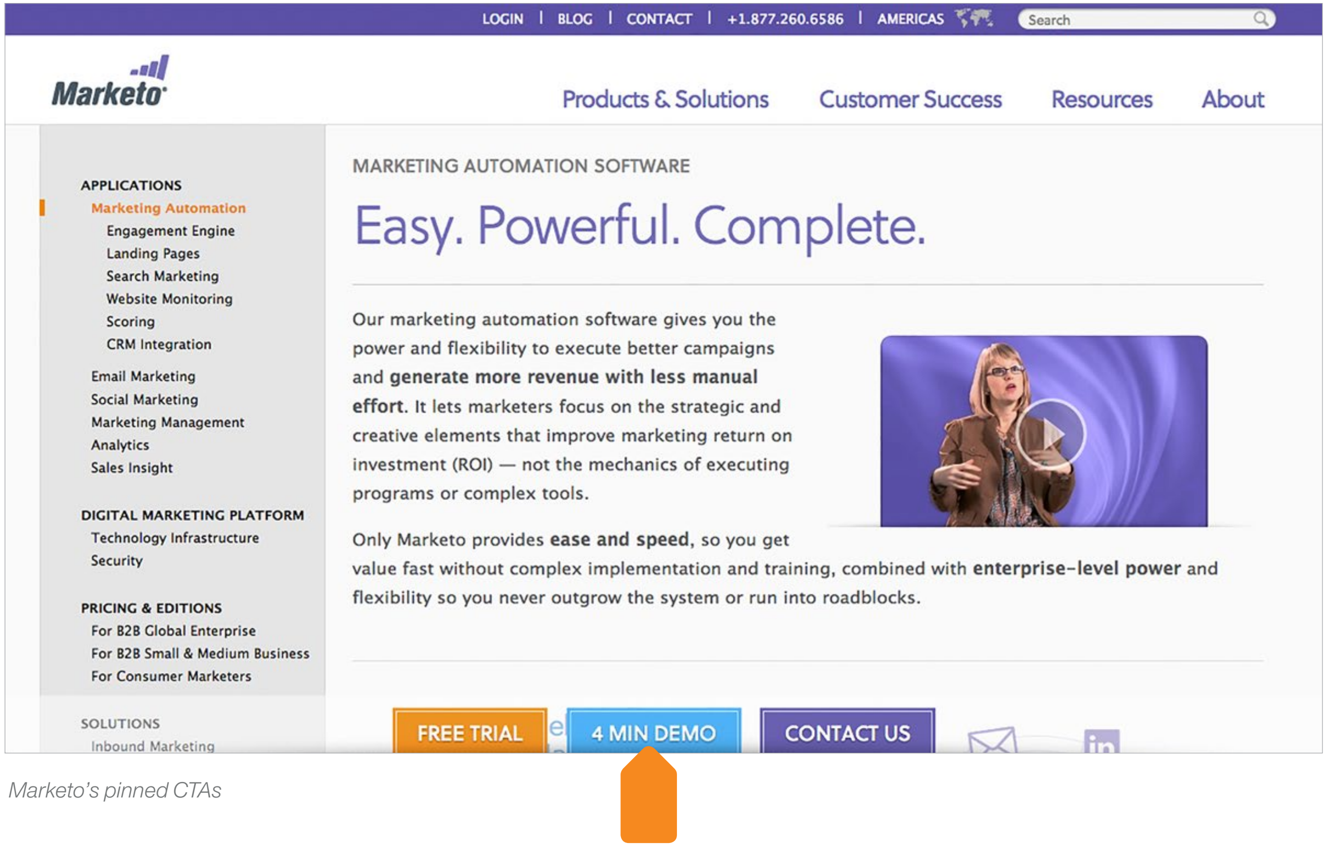
WEBSITE CALLS-TO-ACTION (CTAS)

The bread and butter of your website lead generation campaign is the call-to-action (CTA). Your website can be a powerful lead generation tool—get creative, and start converting.

Collecting Website Leads

We've already described the qualities of a call-to-action (CTA) in our section on content marketing, but here's how they should function on your website.

On the Marketo website, our most important CTAs are our free trial, our four minute demo, and our invitation to "Contact Us". Notice that the button colors stand out, and the CTAs are very clear. The viewer knows exactly what to do. We also pin our most important CTAs to the screen, so no matter where a viewer scrolls, the CTAs follow.



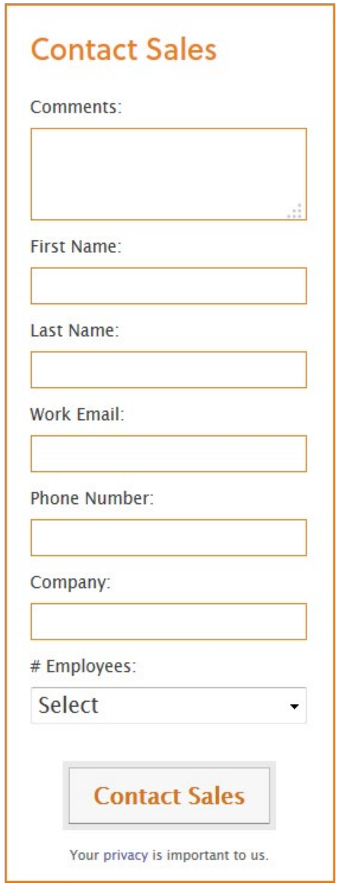
Marketo's pinned CTAs

WEBSITE CALLS-TO-ACTION (CTAS)

Contact Us

If a lead wants to contact your company directly, make it as easy as possible. There is nothing more frustrating than failing to find a company's contact information or contact form. At Marketo, we display our phone number in our header, embed a "Contact Sales" form in our product pages, and display a "Contact Us" button (which links to a landing page) on every page of our site.

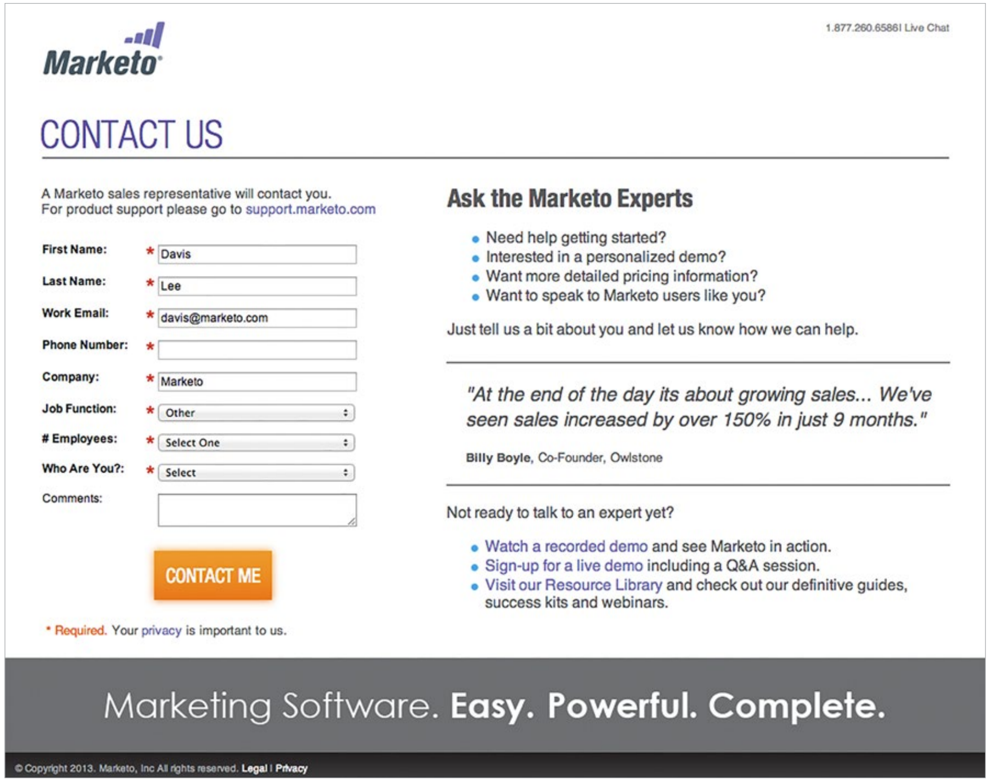
Our "Contact Sales" embedded form ask leads for their first names, last names, work emails, phone numbers, companies, and the number of employees at their companies. We also leave a field for comments and questions.



Marketo's "Contact Sales" embedded form

If you click on a "Contact Us" button anywhere else on our site, you get sent to a landing page. We actually use longer forms there, because we want these leads to be qualified—meaning they really want to contact us.

This landing page collects lead information, includes a customer quote, and has a few additional CTAs, in case the lead is interested in watching a pre-recorded demo, signing up for a live demo, or visiting the resource library.



Marketo's "Contact Us" landing page.

WEBSITE CALLS-TO-ACTION (CTAS)

Asset Download

Another common way to generate leads on your website is through your content asset downloads. If your content marketing strategy is aligned with your lead generation efforts, you should already have assets that will interest your website visitors. And that means you can ask for lead information in exchange!

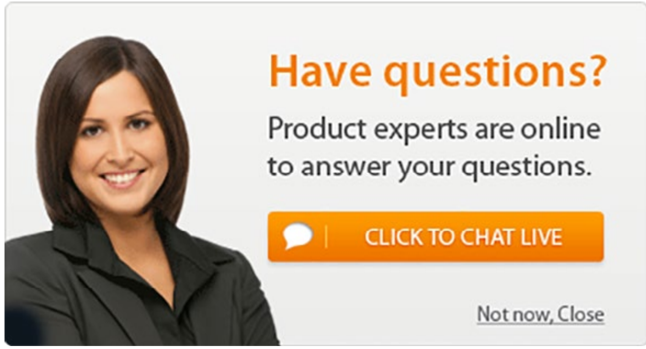
There are many theories about putting a form in front of content assets (known as "gating"). You can gate all of your assets, only gate your Middle-of-Funnel or premium assets, or you can ask a lead to fill out one form to access your entire library. There is no right or wrong way to do this, but at Marketo, we only gate our Middle-of-Funnel or premium assets (like third-party research reports, or our Definitive Guides).

Chat

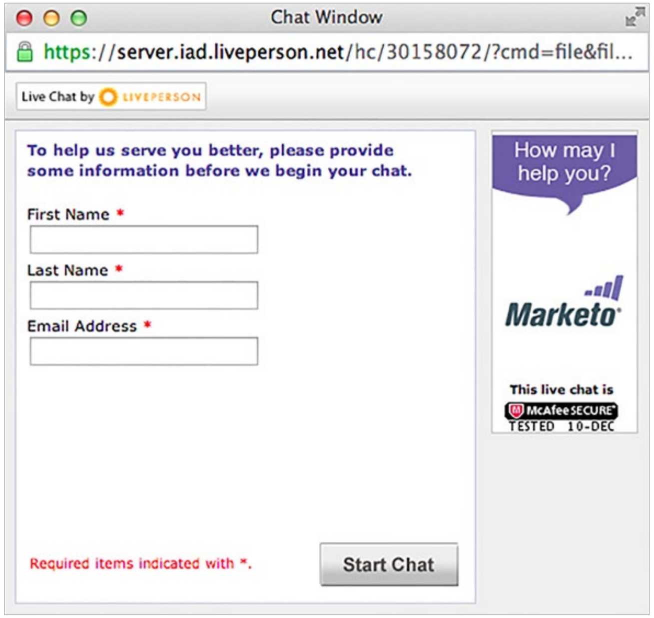
Consider using a chat service to collect leads on your site. Like a "Contact Us" CTA, chats are great for leads who have a question, but don't want to pick up the phone. Chat services (like LivePerson) enable a lead to enter his or her contact information and chat with an educated representative.

We use a chat feature on our product and pricing pages. On both pages the chat only pops up after a viewer has spent a certain number of minutes on the page.

The initial chat pop-up asks if the viewer has any questions. Once a visitor clicks on the CTA, indicating they want to chat, they are brought to a lead capture form asking for his or her first name, last name, and email address. He or she is then routed to a representative who can answer any questions.



Marketo Live Chat



Chat lead capture form

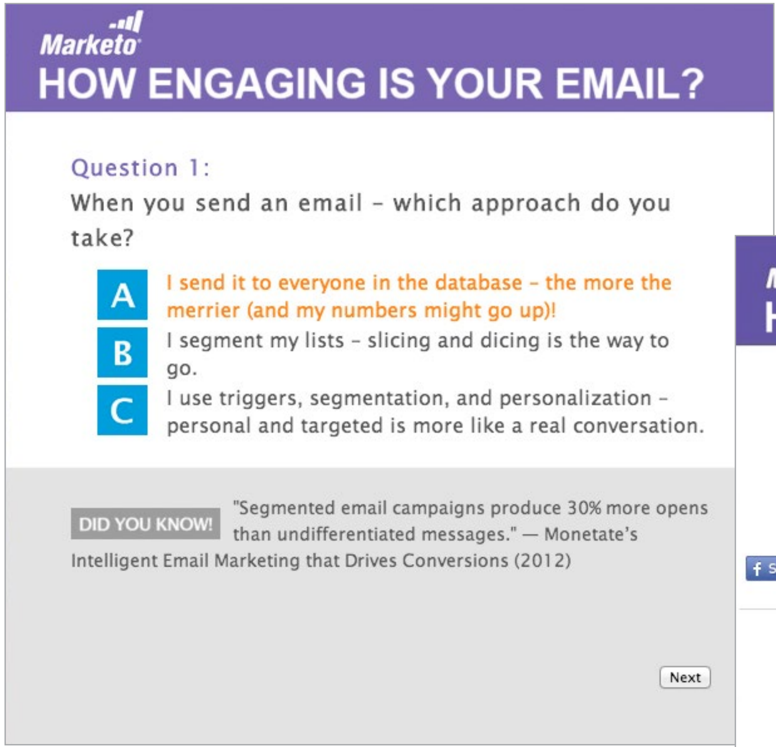
WEBSITE CALLS-TO-ACTION (CTAS)

Free Benchmark, Grader, or Survey

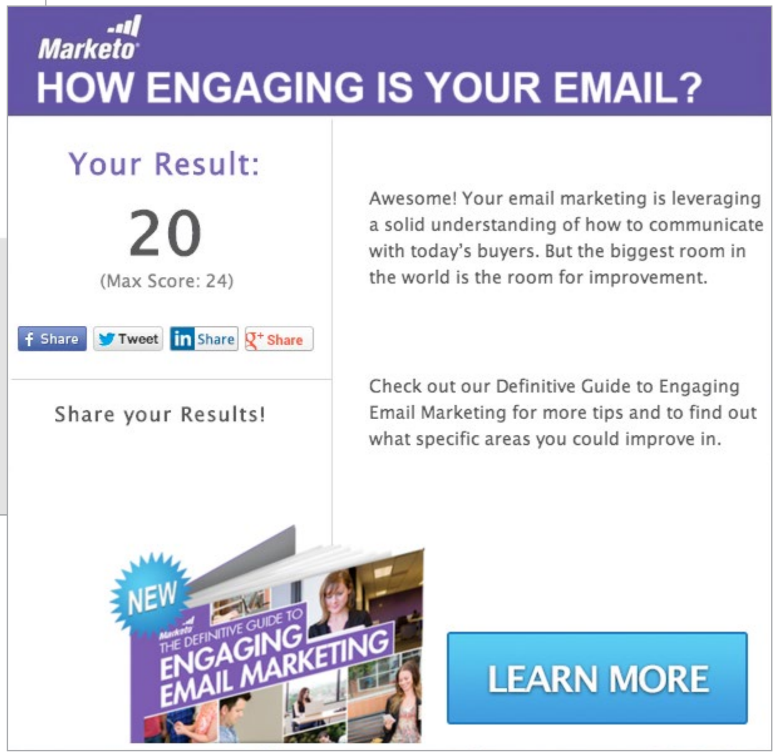
Depending on your product or service offering, you might consider offering your website visitors a value-add in the form of a benchmark, grader, or survey tool. For our *Definitive Guide to Engaging Email*, we teamed up with SnapApp to create a widget, which asked our visitors a series of questions about email marketing engagement.

We scored each survey taker, and included a CTA to "Learn More". The CTA routed each respondent to a landing page where they could input their lead information.

If you are offering a value-add that helps visitors gauge their own effectiveness, you are more apt to collect quality lead information.



Marketo's email survey, accompanying The Definitive Guide to Engaging Email



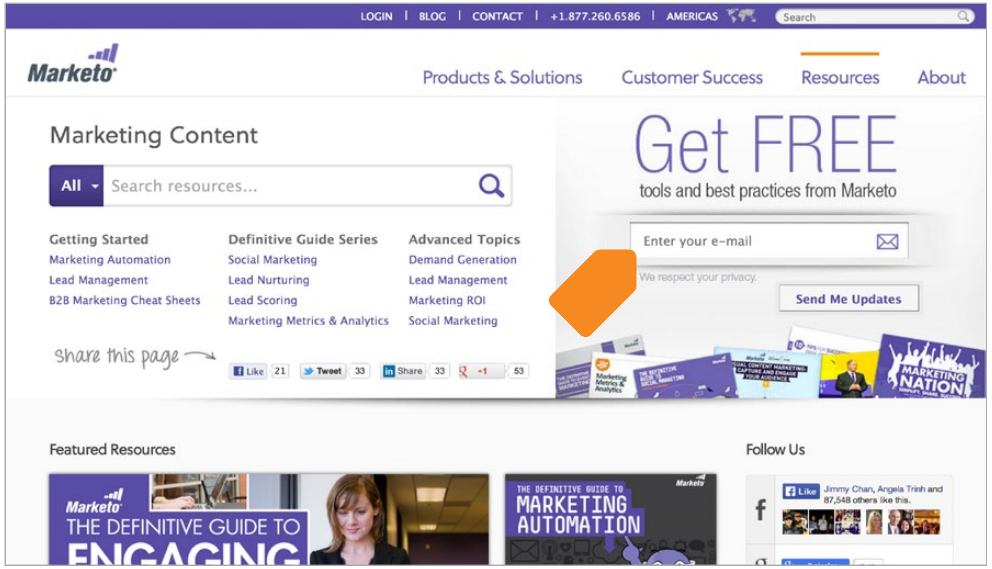
Marketo's email survey results and CTA

WEBSITE CALLS-TO-ACTION (CTAS)

Subscriptions

Another way to generate leads on your website is to offer a subscription to your blog, email program, or resource center. In exchange for a lead's email address, you will send your blog digest, newest assets, or other valuable offers.

We've placed a subscription request form in our resources section, where it gets prime real estate at the top of the page. The form offers free tools and best practices for visitors in exchange for their email addresses. We also let our visitors know that we respect their privacy, and make it clear that if they fill out the form, we will send them updates.



Marketo's subscription request form

Contest

A contest is another way to generate lead information. Host a contest on your homepage to entice visitors to share their information. Everyone loves a chance to win something! Contests can also promote social sharing—just make sure you include social sharing buttons.

***One note:** before running a contest, consult your attorney to make sure it follows legal guidelines.*

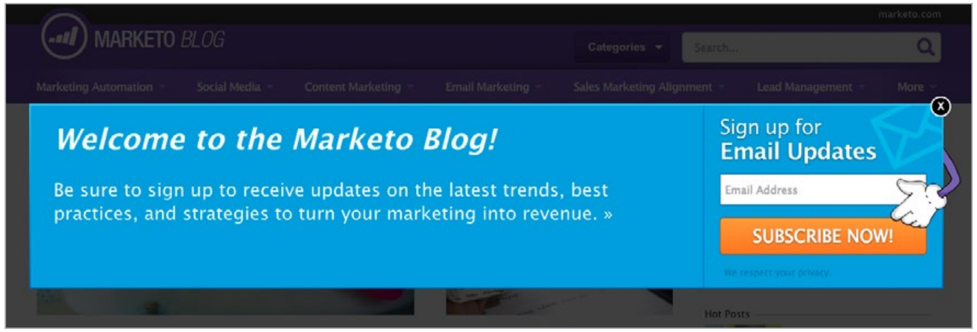
BLOG OPT-INS

Your blog is one of the best places on your website to generate leads. While your blog's primary purpose is as a source of thought leadership and expertise for your target audience, your blog can also help you achieve measurable goals—especially when it comes to lead generation.

You can do this by using blog opt-ins, or subscriptions, as conversion points on your website. When your audience subscribes to your blog, they can either receive an email digest or an RSS feed of posts. In return, you can add their information to your lead database.

The Lightbox

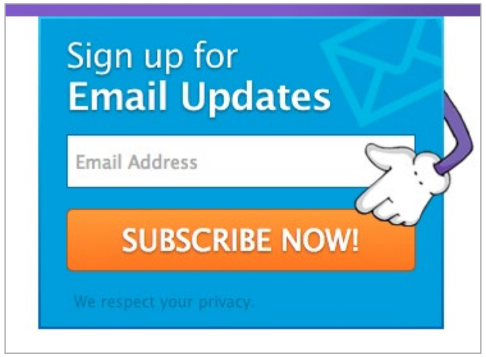
Pop-ups can be irritating, but they can also be very effective—they're certainly worth testing. Lightbox opt-ins can appear after a certain amount of time has been spent on the page, or you can present one to visitors as they navigate your site. On Marketo's blog, we decided to present a lightbox opt-in to non-subscribers once every six months. After that, our subscriber numbers skyrocketed.



Lightbox opt-in offer on Marketo's blog

Sidebar

An opt-in form in a sidebar can be very effective. If you "pin it"—anchor the opt-in on users' screens as they scroll down the page—it's never out of sight (or out of mind). At Marketo, we use a sidebar opt-in for our blog.



Marketo sidebar opt-in

Header or Footer

If someone wants to sign up for your blog, the header is often the first place they look. Your footer is also a logical place to put an opt-in form. In fact, even if you have an opt-in elsewhere on your blog, you might also include one in your footer.

Within Your Content

If your blog is popular, consider adding your opt-in form at the end of each blog post or article. If a visitor has taken the time to read a post, you already have a certain level of buy-in, so it's an appropriate time and place to ask for more!

WEBSITE USABILITY

It doesn't matter how many CTAs, amazing content pieces, or contests you run—if a prospect is confused by your website's layout, there's a good chance he or she will "bounce" (leave your website) instead of converting.

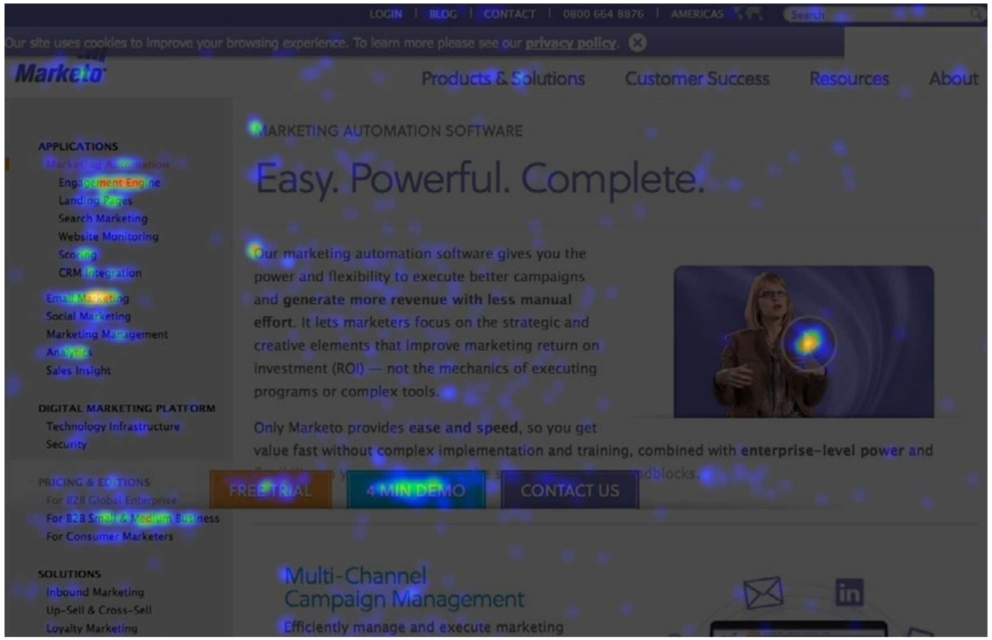
Help your readers understand what you do and where they can find the information they need. Here are the factors that make your website effortless to navigate:

Website Scannability

Structure your homepage and each interior page to be easily skimmed. Most visitors will not read all of your content, so make the most important items stand out. Your most essential content should be at the top of your page, followed by any additional details, and the bottom should contain related information. Bulleted lists and bolded headings can also draw your leads to the most important information.

You can implement a heat mapping tool, such as Crazy Egg, to get a better visualization of where people click, how they scroll, and how they interact with your site. This simplifies later decisions about where to put your copy and CTAs.

Here's an example from the Marketo website (the lighter areas indicate more clicks and hovers):



A heat mapping screenshot, provided by Crazy Egg

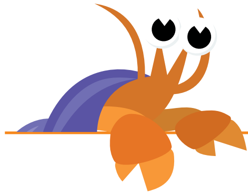
WEBSITE USABILITY

Clear Conversion Paths

To create intuitive conversion paths, you need to get into the head of your target personas. Who are they? What resonates with them? As they search for the right information, what paths will they want to take?

On Marketo's homepage, our main navigation options are "Products and Solutions" (product information and Marketo offerings), "Customer Success" (customer testimonials and stories), "Resources" (content assets and thought leadership), and "About" (all about our business). It's clear which option leads to information about our product suite, and which leads to downloads of our ebooks.

Marketo's homepage, with our four main navigation menus



Resource Center

Content is a critical part of lead generation, so your website should be rich with awesome assets. That said, we know that not everyone has a wealth of content resources at their fingertips. Try to offer a few well-placed pieces that suit the interests of your prospects.

As Manya Chylinski wrote on the Content Marketing Institute's blog, a solid resource center helps your customers and company because:

- It enables customers and prospects to easily find the information they seek.
- It encourages serendipitous discovery of content.
- It increases the "stickiness" of your website.

CHECKLIST: USING YOUR WEBSITE FOR LEAD GENERATION

Homepage

- ☐ Highlight the latest/hottest content
- ☐ Use eye-catching visuals
- ☐ Write catchy copy
- ☐ Include ways for people to opt-in to content

Website Content

- ☐ Use attention-grabbing headlines
- ☐ Tie customer needs to solution benefits
- ☐ Make calls-to-action clear and prominent
- ☐ Use consistent voice
- ☐ Write clear and concise copy
- ☐ Copy edit for typos and grammatical mistakes
- ☐ Keep paragraphs short
- ☐ Use easy-to-read font
- ☐ Make content scannable
- ☐ Use compelling imagery (little or no stock imagery)

Landing Pages

- ☐ Include your logo
- ☐ Write a great headline
- ☐ Focus on a single call-to-action
- ☐ Entice readers to respond to your offer
- ☐ Use plenty of bullet points
- ☐ Feature relevant visual(s)
- ☐ Include a short form to capture leads
- ☐ Display a “Thank You” page pointing to a related offer

Product/Service Pages

- ☐ Use strong calls-to-action on each product page
- ☐ Make contact information clear on the page
- ☐ List pricing information (if applicable)
- ☐ Address customer pain points

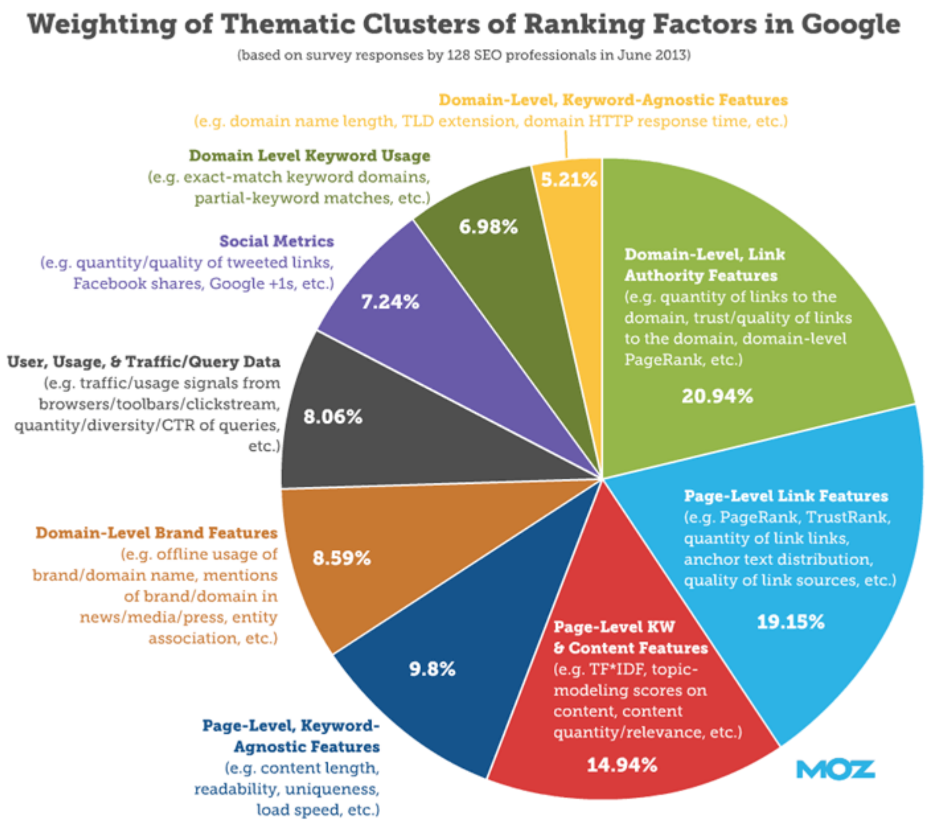
Resources Page

- ☐ Organize your content logically
- ☐ Make your content easily accessible, with one click
- ☐ Include visual thumbnails of each asset
- ☐ Make sure each page is optimized for SEO

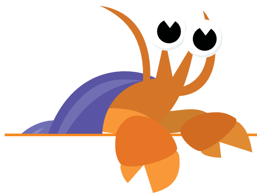
SEARCH ENGINE OPTIMIZATION (SEO)

Your prospects are searching for what you sell—but will they find you? Search marketing is about getting found by prospects through search results and converting them into opportunities. The higher you rank in organic searches, the more people will find you.

So how do you achieve good rankings? In June 2013, inbound marketing company Moz surveyed 128 SEO professionals to determine the impact of broad algorithmic elements in Google search. As you can see from this pie chart, Google considers many elements of a webpage when determining rank.



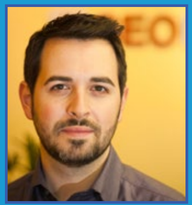
Results of Moz's June 2013 survey of SEO professionals



The Google Crawler

Your site's rank in Google search results depends on all of the factors displayed on Moz's pie chart, but also on Googlebot, which crawls the web and (according to Google) "discovers new and updated pages to be added to the Google index". Googlebot uses a sophisticated algorithm to determine which sites to crawl, how often, and how many pages to index from each site. And what does Googlebot look for? A site with lots of great content and well-formatted media.

SEARCH ENGINE OPTIMIZATION (SEO)



The Top 3 Tactics for Quality SEO Traffic

By Rand Fishkin, CEO, Moz

All marketers need a cogent, nimble, long-term strategy for their marketing as a whole, and knowing how SEO fits in is the key. Lots of individual tactics work temporarily—sometimes for years, even—but the engines continues to evolve, new results types emerge, and users change their behavior. Organizations possessing clear strategy can shift their tactical approaches and continue to reach the audience they need with the message that converts best.

1. **Be the exception.**
   If everyone in your field (or your search results) is earning their rankings, links, and attention one way, try to find a new path. Imitation is the best way to stay one step behind. Innovation is the way to leap ahead.

2. **Better content > more content.**
   Don't be fooled into thinking that you need to produce something every day or every week. Sometimes, long projects that produce immensely valuable, hard to imitate materials are much more valuable.

3. **Your snippets are as important as your rankings.**
   Don't get more obsessed with moving up the rankings than you are with crafting the best message in the search results. Your titles, meta descriptions, URLs, publication dates, and more all influence how likely you are to earn a click. Often, winning the click-through battle will earn you higher spots in the rankings over time.

AUTHENTIC CONTENT

Google is constantly optimizing to focus on quality content, as is evident in their recent release of Hummingbird. Named for its precision and speed, Hummingbird represents a big change in Google's approach to search.

In previous updates, Google focused on improving their indexing; next they concentrated on identifying spam. With Hummingbird, Google is trying to improve the other side of the search. They're trying to get better at listening—at finding out what users want to know.

This shift shouldn't come as a surprise to marketers. Google has announced a string of updates in the last few years, each one altering the best practices for SEO.

So how should marketers respond to Hummingbird? By focusing on relevant, high-quality content. Smart content marketing is one of the best ways to nurture relationships with your prospects and customers, but it requires a whole mix of techniques. Optimization is vital to that mix, but so is the constant creation of valuable materials. You need to drive traffic to your site, but you also need to keep your audience on the page.

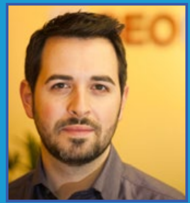
If you're continuously creating the kind of content your audience is looking for, the new algorithm will help them find you. That's why Hummingbird is a win for your customers, and ultimately a win for you.

"Just because you get 'SEO traffic' doesn't mean it's good traffic! Be sure that your content appeals specifically to your target audience—avoid the temptation to write too much 'thin' content in order to 'go viral'. Instead, provide meaningful resources for buyers in each stage of your sales funnel."

– Nate Dame, CEO and Founder, SEOperks

Ask the Experts:

What types of content works best for converting SEO traffic to leads?



"If you're targeting keywords that are conversion-likely (they have true purchase/signup/action intent), it pays to have pages that are both worthy of being shared and contain enough information to drive the conversion. Talk to your customers and to your evangelists (those who help your message spread), discover what makes both tick, then attempt to combine them."

– Rand Fishkin, CEO, Moz

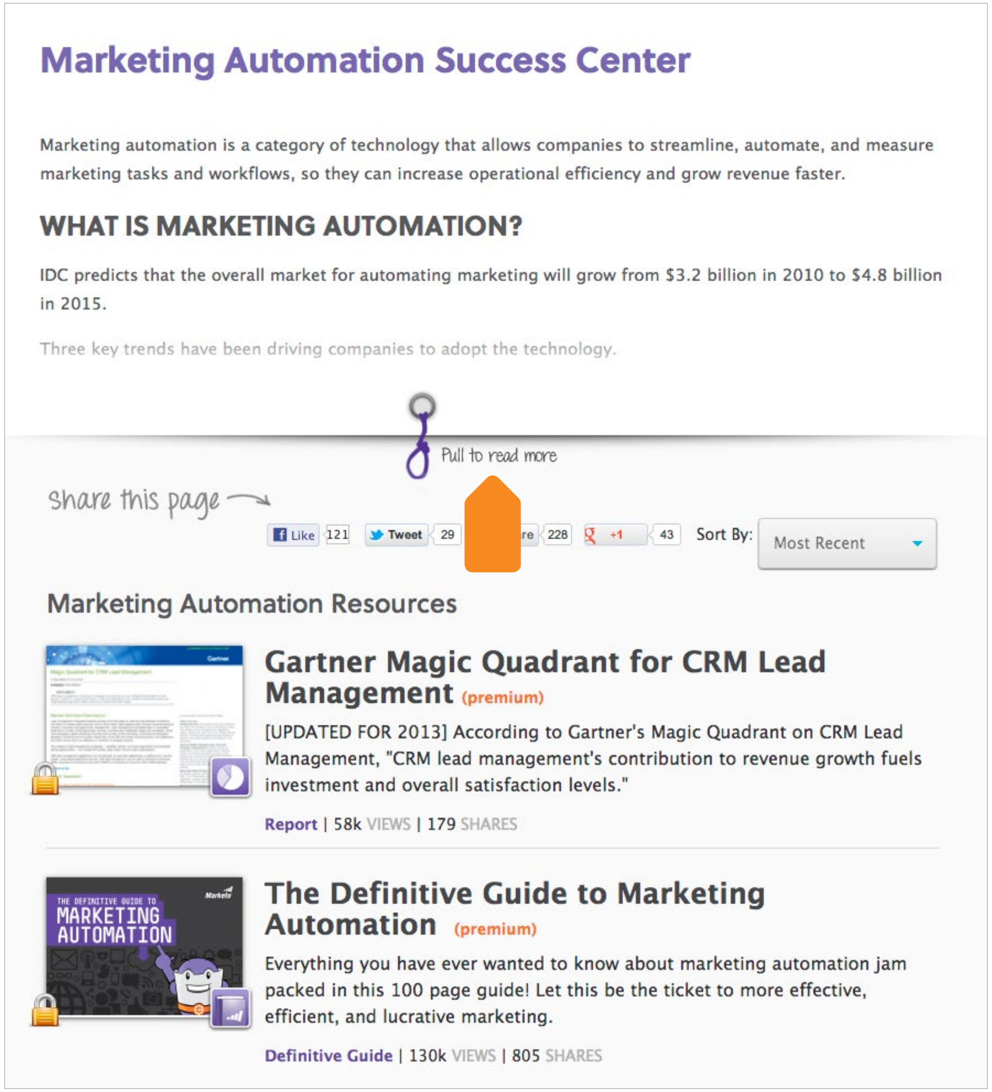
AUTHENTIC CONTENT

Power Content

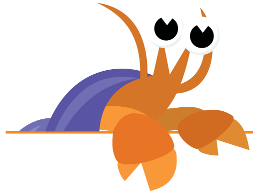
At Marketo, we create "power content" to rank highly for certain terms, with the goal of making our resource pages a premiere educational source. Power content can be lengthy, but it's always educational, catering to customer needs and Google's ranking preferences.

For example, we wanted to rank for the phrase "marketing automation", so we added power content to our marketing automation resources page. Notice the "Pull to read more" tab—this allows us to include lengthy copy, while keeping our resources above the fold.

Since launching our marketing automation power copy in February of 2013, we have seen a 114% total increase in organic site traffic to our resources page.



Marketing automation power copy on Marketo's website keeps our ranking high.



Power Copy Checklist

According to Nate Dame from SEOperks, your power copy should include the following:

- ✓ A definition of your main keyword, and the reason you're referring to it
- ✓ The reason the keyword is important to your site's visitors
- ✓ Between three and five additional headings with applicable content
- ✓ Data and statistics (if available)
- ✓ A quote from one or two experts on the topic
- ✓ Your company's relationship to the keyword
- ✓ A conclusion, with a call-to-action
- ✓ External resources and suggestions for further reading

KEYWORDS

When creating your SEO strategy, first determine your keywords–i.e. what you want to rank highly for–and then optimize for those terms.

This means that when someone searches for that term, you'll come up in the first results. Keywords should be chosen based on:

- **Relevant business goals**
- **Traffic opportunity**
- **Competition**

Keyword Research

Try Google Adwords Keyword Planner to find new search terms. Before you implement your new keywords, research click-through-rate (CTR) estimates in Keyword Planner, so that you can determine conversion success over time. Tools like Google Webmaster can help you measure your results.

When researching keywords, ask yourself:

- How relevant is this keyword to my website, my products and services, and my content?
- If someone searches for this keyword, will he or she find my offerings useful?
- Do we have content to offer for this keyword or will we have to create content?
- Will traffic for this keyword deliver leads to our sales team?

Consider scheduling a keyword brain-storming session with your team. You want to have a solid list of keywords—you could have 10, 50, or hundreds of words, depending on your business and goals.

Because your keywords will also be used in Pay-Per-Click and other online ad campaigns, think about the distinction between early and late stage keywords. You want your offers and copy to resonate with buyers at the right place in their buyer journeys.

Once you determine what keywords will resonate, check to see which websites already rank for that keyword. Next, look at the ads that your competitors are serving up. The more ads, the higher the value of your keywords—and the harder it will be to rise above the noise. Search volume can tell you how popular your keywords are. Make sure people actually search for your keywords, but the higher the keyword search volume, the more money your keywords will cost.

KEYWORDS

Keyword Document

Once you've created a spreadsheet or document of keywords you want to rank for, grade their priority and list their target URL, making it easy for your whole team to use those keywords. At Marketo, we use a keyword document for our blog, so we know what to link to. Remember, Google doesn't like exact-match keywords, so look for phrases that relate to your target term. Just make sure that your keywords are used naturally—no keyword stuffing!

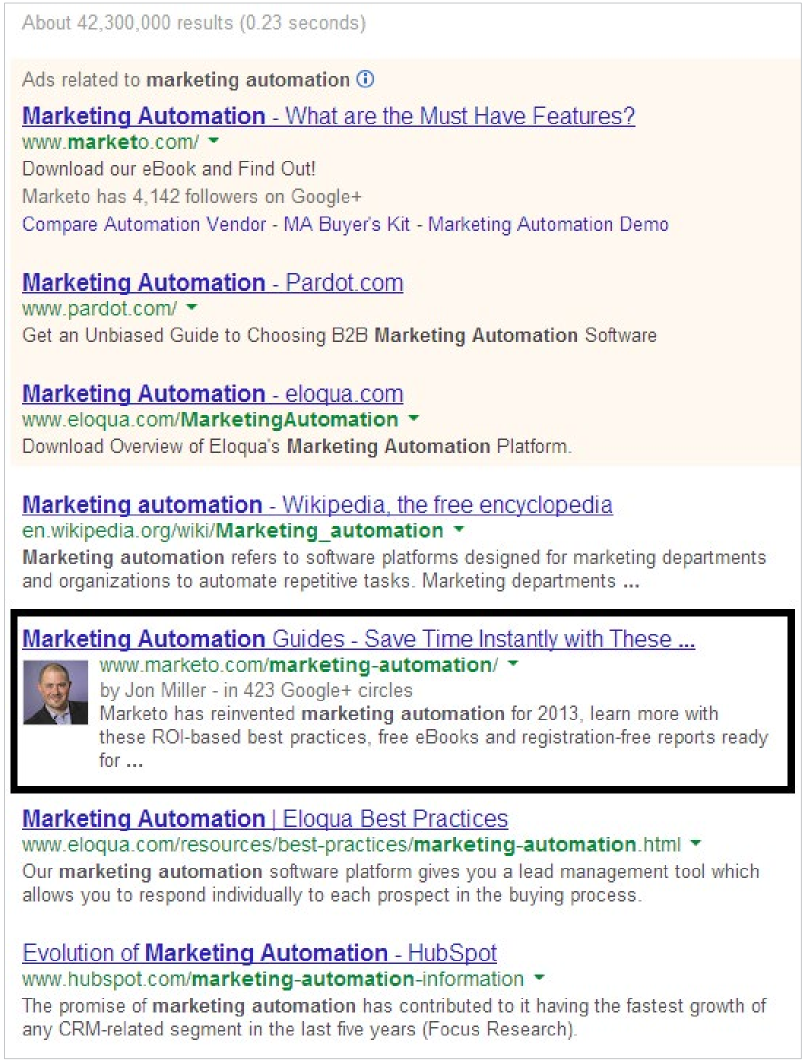
To avoid using exact keywords (which Google penalizes), try creating phrases that include your keywords. For example, instead of "revenue marketing", we use the phrase "how to tie marketing effort to revenue".

ON-PAGE SEO

In the past, on-page SEO consisted of meta tags, alt tags, encoding, title tags, canonical URLs, keyword stuffing, and more. But, as we've explained, SEO has changed with Google's updated algorithms.

Page Title

Try to use one primary keyword in each page title tag. Page titles affect how Google ranks your page, but they can also make your site look more appealing in search results. A compelling page title that states exactly what a page is about can entice a user to click. A good practice is to put your primary keyword close to the beginning of the title, as opposed to the end.



Using keywords in page titles boosts your search rankings

Headline

Your headlines should support the keyword focus for the page. If a visitor clicks on your page title and expects a certain outcome, your H1 (or header) should deliver! There's some industry-wide debate about whether titles and H1s should match exactly, but make sure they are similar.

ON-PAGE SEO

Images

Using images on your page can actually help you in rankings, because traffic can come from image-based search engines like Google Images. For high rankings, Moz suggests that your images have a title, filename, surrounding text, and alt attribute.

Content

Make sure your content is educational and relevant to your readers. Keyword stuffing (or overloading a page with keywords specifically to improve SEO) is a big no-no, and Google has gotten wise to the practice. Moz suggests a test to ensure your keyword placement reads naturally: have a non-marketing friend read the page, and then ask if he or she thinks a term is suspiciously prominent. If he or she says yes, you should revise.

In blog posts, a good rule of thumb is to use your keyword two or three times per short post, or between four and six times for long ones.

URLs

The structure of your URL is still important. URLs should be concise, but should also include your keywords. Your URLs should mimic the site page structure—for example, **marketo.com/content-marketing** is clearly a page about content marketing on the Marketo website.

Load Time Averages

Slow load times hurt your Google rankings, even if you have great content. Why does Google care? They want to give their users easy-to-access information—not content that takes forever to load.

ON-PAGE SEO

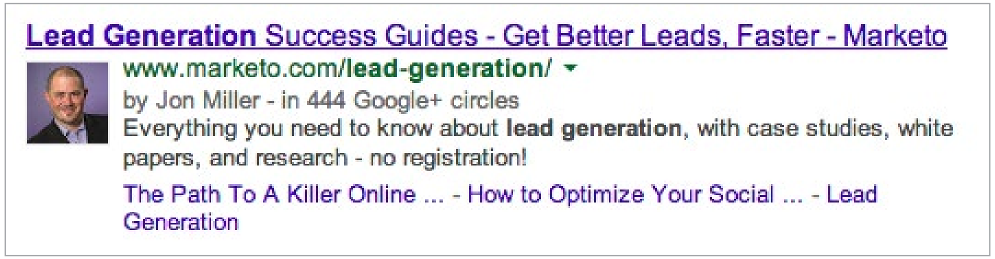
Authority and AuthorRank

Google Authority and AuthorRank take social signals and content authority into account, so that search engines can give smarter, more relevant results. Claim ownership of your content by linking it to your Google+ page.

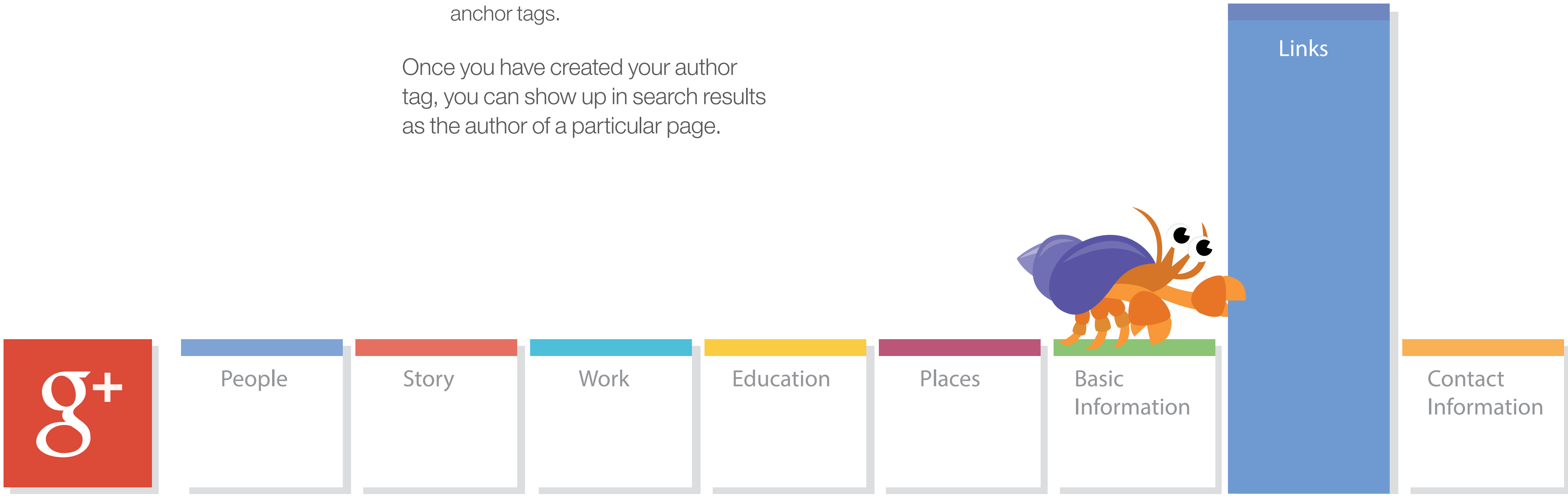
Here's how to create a Google+ author tag:

1. Sign into your personal Google+ profile
2. From your profile page, hit the "About" tab on the top menu. By editing the "Links" section, you can let Google know you are a content author for websites or blogs.
3. From the page you want to show authorship of, you can link your Google+ profile by adding "rel=author" to the page's HTML anchor tags.

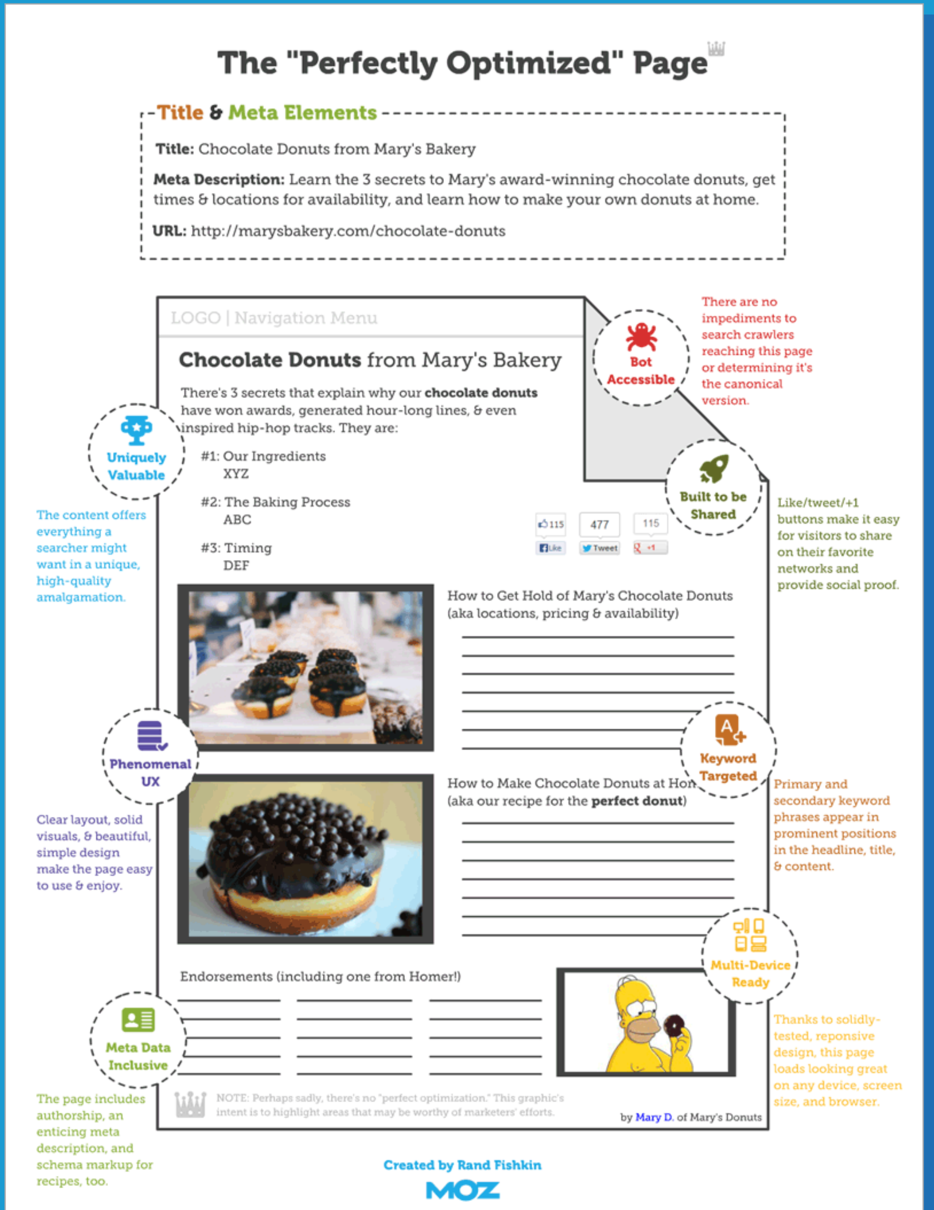
Once you have created your author tag, you can show up in search results as the author of a particular page.



Google+ Author Tag



THE PERFECTLY OPTIMIZED PAGE– "CHOCOLATE DONUTS" ACCORDING TO MOZ



LINKS

Establishing link-based authority on one of the major search engines requires a mix of on-page SEO and link building efforts.

The exact mix is hard to pin down, but authority is established though a trusted link profile—and a good amount of thought leadership content.

On-Page Links

To show Google that a page is relevant to people searching for your keyword, you need to create links to that page, using variants of that keyword as anchor text. For instance, we want our event marketing resource page to rank highly for the term "event marketing", so whenever we use the phrase "event marketing" on another page, we link it back to the resource page.

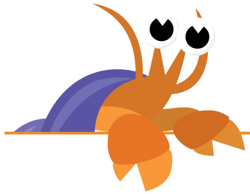
External Links

According to Moz's survey (see p.43), link authority factors (such as the quantity and quality of links to your domain and specific pages) are the biggest factor in your rankings. This means you need other sites to link to your domain and the pages for which you want to rank.

For good reason, external links improve your ranking authority more than your own on-page links—more so if the external sites are relevant to your business. Also, the higher the external site's authority, the more credit Google will give you for the link.

Here are some easy tips to get started with link building:

- Make sure your content is relevant, educational, fun, and link-worthy.
- Make sure the sites that link to you are reputable and have good content.
- Ideally, the anchor text in the link from the external site should use a variant of your keyword phrase.



The Relationship Between Social Media and SEO

As SEO and social have become increasingly intertwined, Google now uses social signals to determine how your company ranks in search results. Engagement from your followers on social can actually boost your SEO. Fostering social engagement requires valuable content: the more useful people find your content, the more they'll engage and share.

CHAPTER SIX:

LANDING PAGES

LANDING PAGES FOR LEAD GENERATION

Landing pages are customized pages that your leads are directed to from a social media page, an email send, an event invitation, a paid ad, or a search engine result.

No matter how much time or money you spend on a campaign, if your landing page doesn't resonate with your audience, they will bounce—potentially never to return. The goal of your landing page is to keep a potential customer interested enough to keep reading—ideally, they will fill out your form and become a lead.

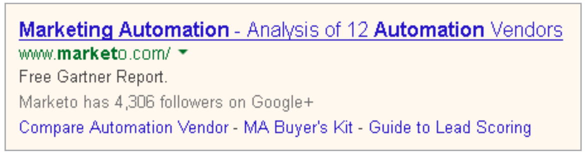
Most leads take only a few seconds to decide whether they'll read a page or bounce. Does the page make sense immediately, or is it hard to understand? Is it relevant to the link your lead clicked on, or does it seem out of place?

LANDING PAGES FOR LEAD GENERATION

Be Campaign Specific

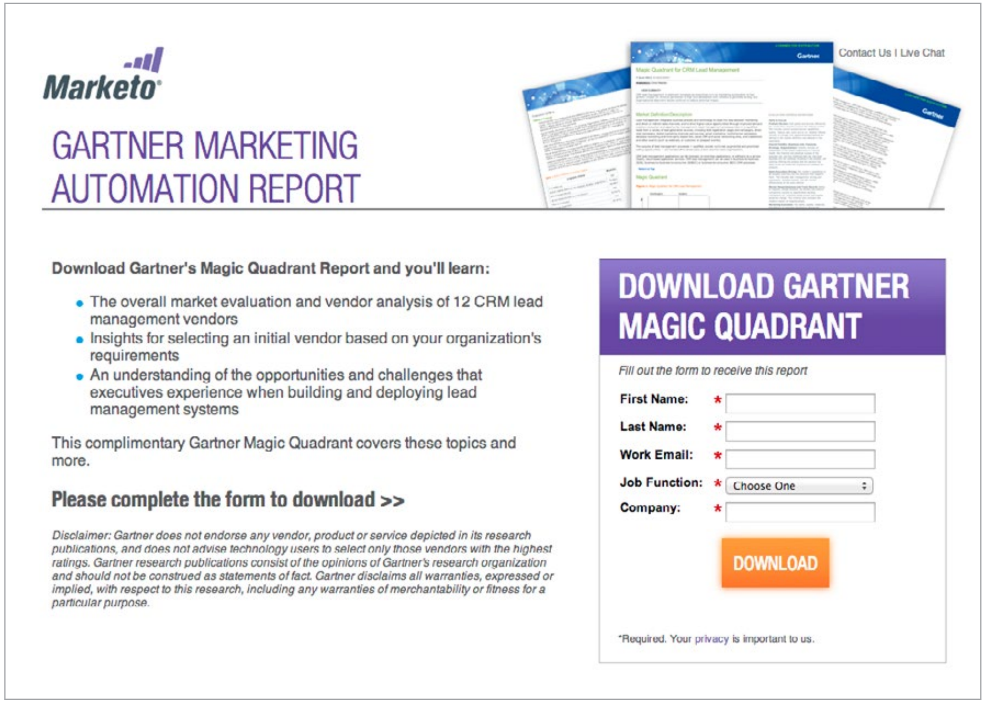
Your landing pages should be specific to your campaign. Although creating a new landing page for every campaign isn't easy, it's a critical part of conversion and optimization.

As an example of what we mean, here's a PPC ad placed by Marketo, targeting the phrase "marketing automation".



Marketo PPC ad

Next, check out the landing page on the right that this ad links to. The landing page copy (and the offer) is consistent with the ad.



Marketo landing page for a marketing automation ad

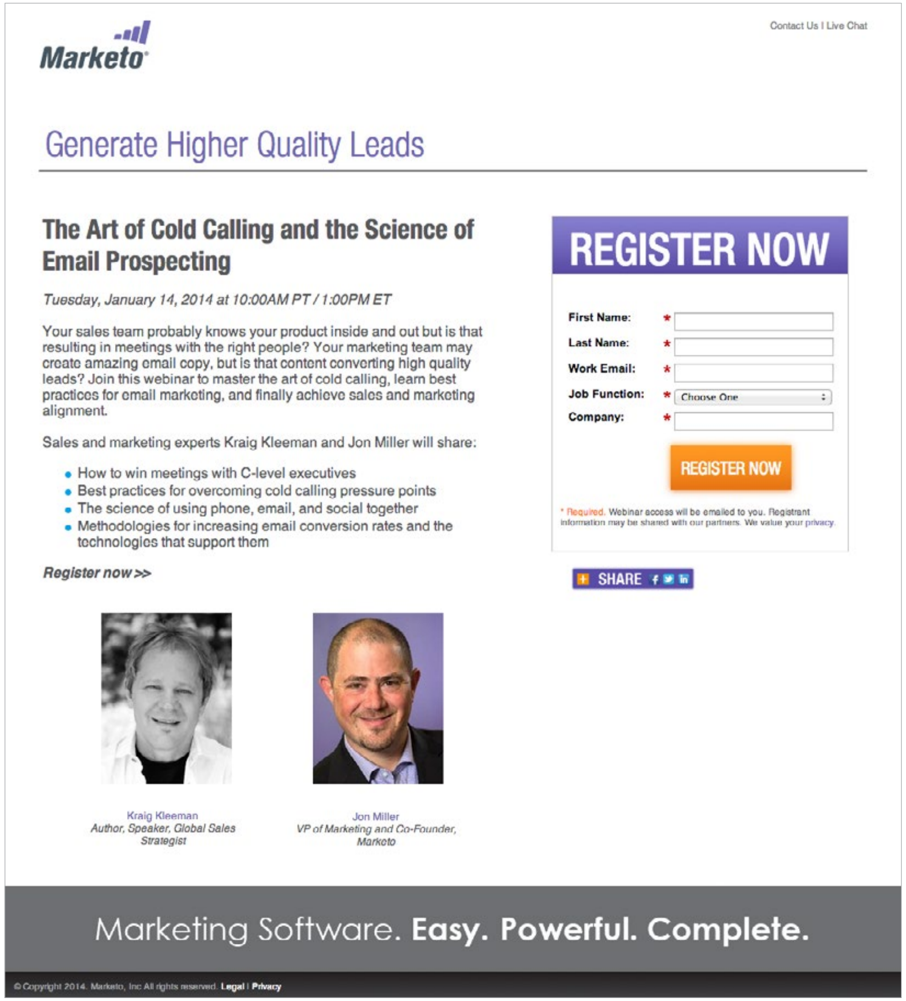
LANDING PAGE DESIGN

Err on the side of simplicity with your landing page design. Use your design layout carefully—the wrong design for your audience can immediately detract from the offer and ultimately the conversion. Simply put: design can have a polarizing effect.

Consider including the following design elements in your landing pages:

- Company logo
- A banner image or heading
- A “hero” shot—a mock-up of your ebook or offer, or a photo of your webinar speaker
- Social sharing buttons

Basically, you want to follow the K.I.S.S (Keep It Simple, Silly) rule with a logical, well-designed landing page—your lead shouldn’t have to wade through clutter.



A simple, streamlined landing page for a Marketo webinar

Removing Navigation

It may be tempting to include your main navigation links on your landing pages (“If they don’t like this offer, they’ll be able to find something else!”), but these can distract your leads from your CTA. In eye tracking studies, it’s been found that navigation panels draw attention away from your offer and conversion.

Remember that your main goal isn’t a visit to your website—it’s lead conversion for a particular campaign. After they convert, feel free to send your leads additional information—just don’t muddy the waters at your initial interaction.

LANDING PAGE COPY

Your landing page copy and CTAs should be clear and direct, and should give your prospects a good reason to provide their information.

As you write your landing page copy, use these four steps as a guide:

1. **Set up the problem**
2. **Talk about the solution**
3. **Point out the WIIFM (What's In It For Me)**
4. **Deliver the goods (such as an ebook, video, or webinar registration)**

Scannable Content

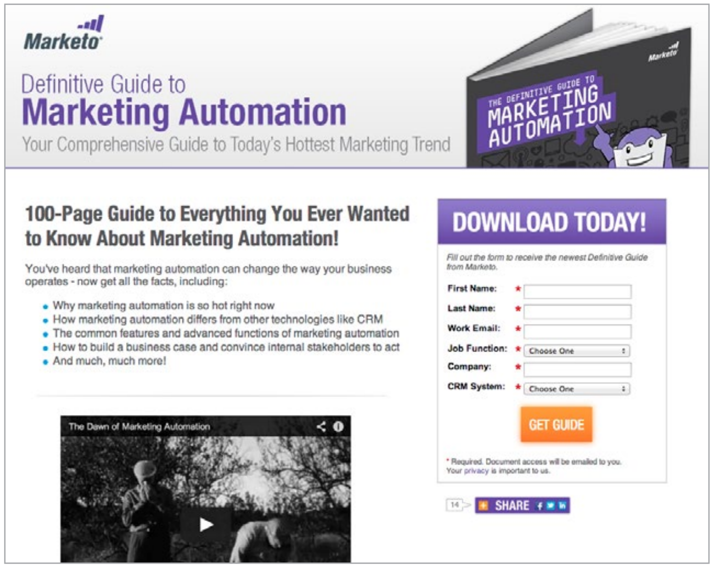
People simply don't read full landing pages—they scan. Studies have shown that, at most, people read three pieces of your landing page:

1. The headline
2. Bullet points
3. Bio (if applicable)

Keep it short and sweet with a bold headline, one or two short paragraphs of explanatory copy, and bullet points to show your leads why they should click through. To engage leads without overwhelming the page, consider using interactive elements such as an audio clip or a short video.

The landing page to the left offers our *Definitive Guide to Marketing Automation*. It includes a bold headline, bullet points, a fun video, and instructions. There is no superfluous copy—it is simple and concise.

Your landing page doesn't need to sell your product and company, but it does need to have a very clear offer. Focus your landing page around a single CTA, which must be relevant to the ad, email, or link that your lead originally clicked on. Avoid additional offers, or additional information about your company.



Landing page offering The Definitive Guide to Marketing Automation

Reassure Your Lead

Your leads are risking their privacy (or more) by filling out your form. Reassure them with privacy statements, customer testimonials, and guarantees. You want your leads to feel safe giving their information to a reputable company—add copy or imagery to reinforce that trust.

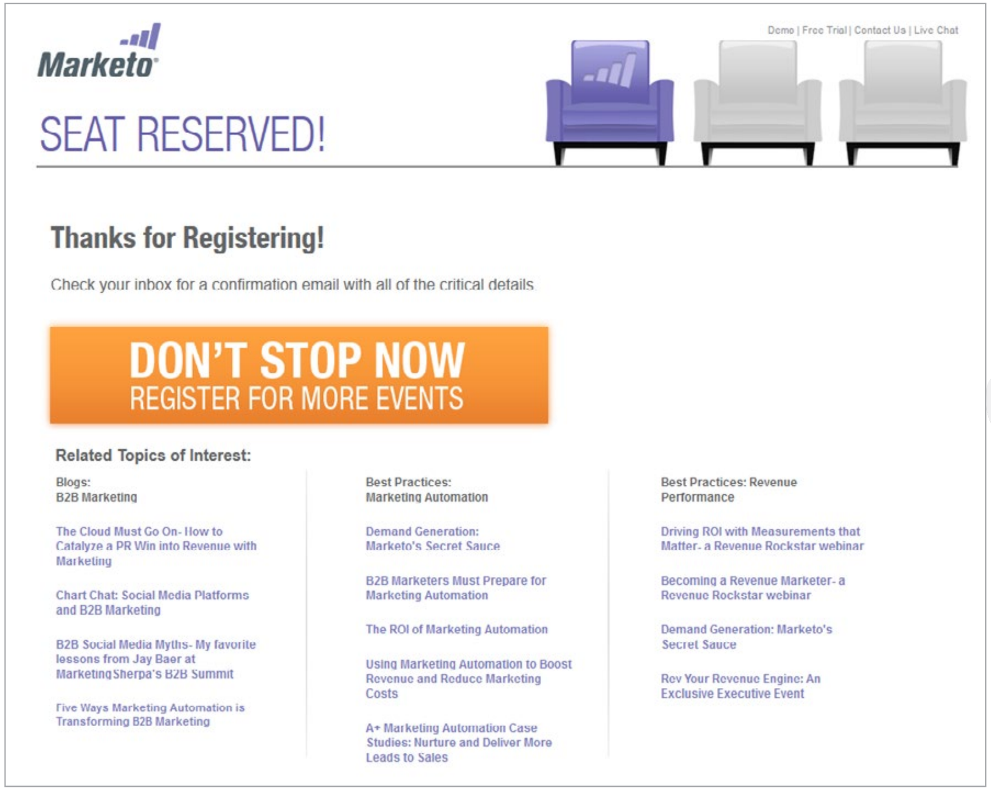
CONFIRMATION AND THANK YOU PAGES

After a customer converts, take time to thank them with an email, or send them to a confirmation page.

Confirmation and thank you pages are an important way to track conversion.

These also give you the opportunity to deepen the relationship by making another offer, promoting your blog, asking for feedback or a social share, or running a poll. In fact, over 40% of prospects are willing to share additional information after they convert.

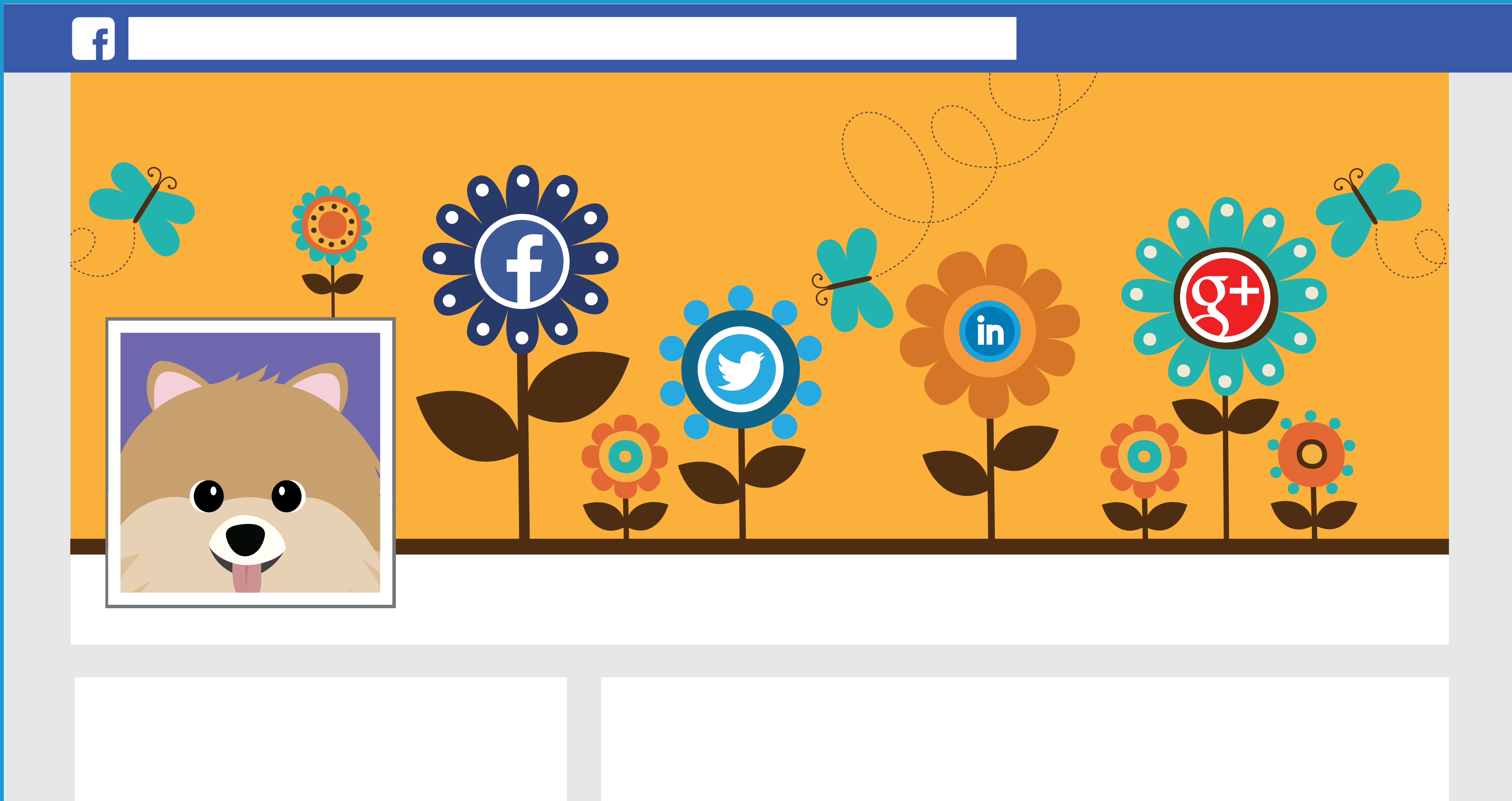
Take a look at the landing page to the right for Marketo webinar registrants. The page asks you to register for more events, and gives you a list of resources that relate to the webinar content.



A Marketo "Thank You" page

CHAPTER SEVEN:

SOCIAL MEDIA AND LEAD GENERATION



OPTIMIZING SOCIAL MEDIA FOR LEAD GENERATION

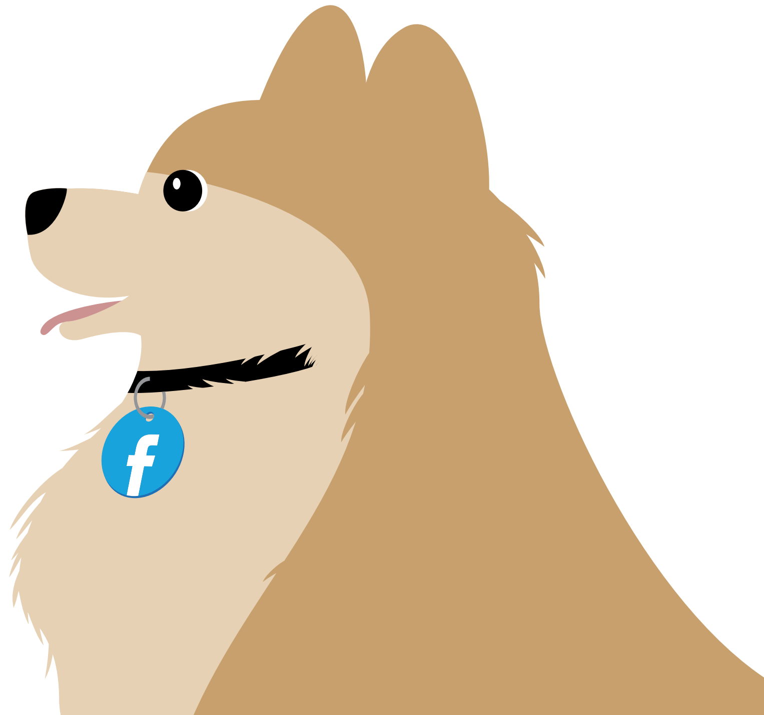
Using social media to brand your business isn't groundbreaking anymore. Been there, done that? But although social is still important for branding and generating buzz, it's increasingly used for lead generation.

At Marketo, we've found that tapping into social media channels can transform your lead generation efforts from blah to wow.

Social for Lead Generation Power Tips

1. Don't take yourself too seriously
2. Organic isn't enough on its own; don't be afraid to pay to boost your presence
3. Focus on valuable content and solid offers
4. Create strong calls-to-action (CTAs)
5. Always add value
6. Never forget that social is a two-way street

> "For successful lead generation on social, equip your buyer for success. Be personable, connect with your prospect's challenges, and give them a next step to move forward."
>
> **– Chris Brogan**
> **CEO and Founder, Human Business Works**



PEER-TO-PEER INFLUENCE MARKETING

Social marketing is shifting away from company-to-buyer marketing, and toward peer-to-peer influence marketing.

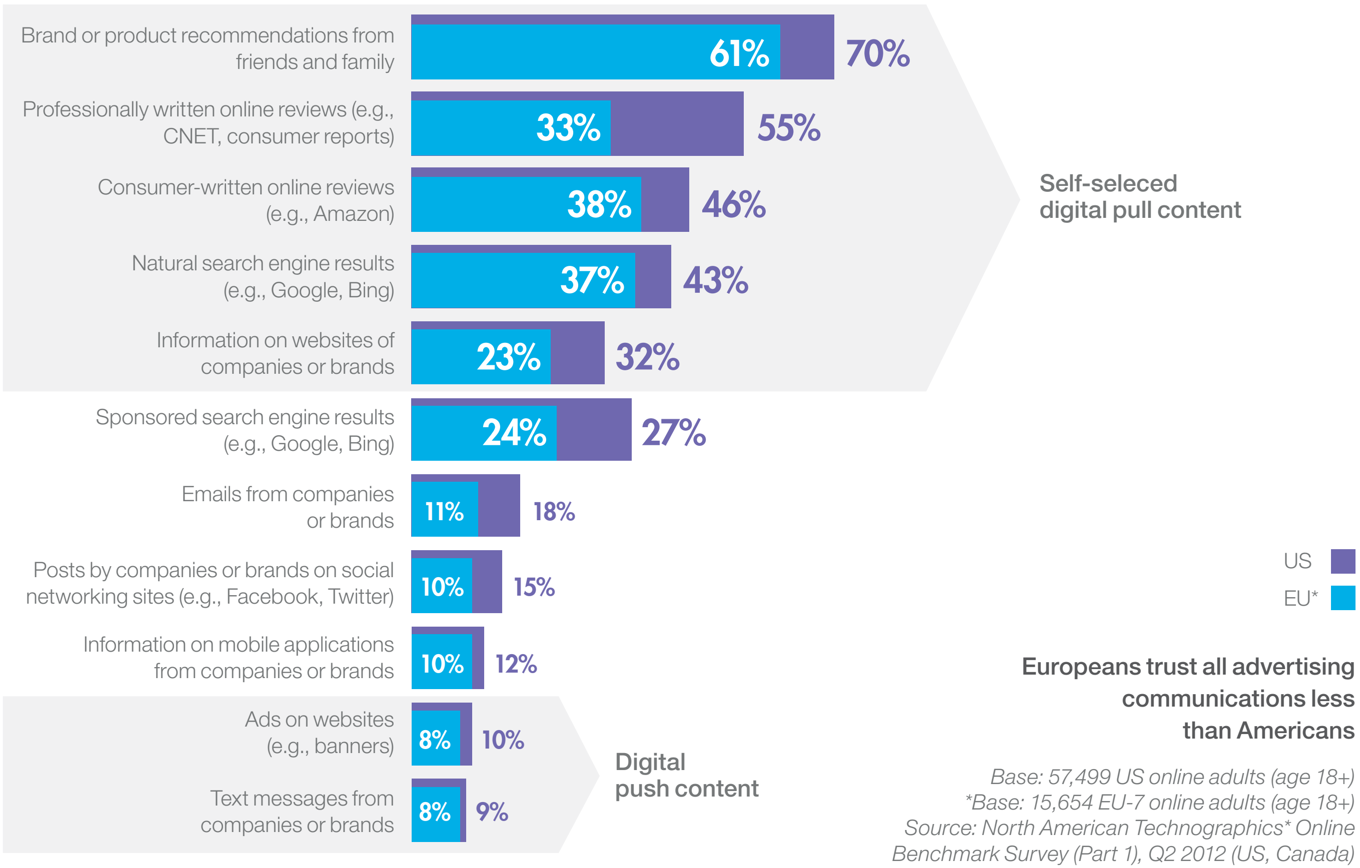
Need proof? A recent Forrester survey found that only 20% of buyers believe what a brand says about itself, because people view any brand-to-buyer communication as an advertisement. Conversely, 70% of buyers trust the recommendations of their friends and family.

When people learn about your brand through social, it gives you the opportunity to turn those "Likes" into leads. By adding elements of social to your campaigns, you empower customers, prospects, and fans to become brand advocates.

Leveraging the power of peer-to-peer communication delivers no- or low-cost brand lift and increased brand authenticity. Because your audience's peers have nothing to gain by recommending a product, peer-to-peer word of mouth is one of the most credible forms of "advertising".

"To what extent do you trust each of the following types of advertising/promotion?"

(4 or 5 on a scale of 1 [do not trust at all] to 5 [trust completely])



A Forrester Research survey on consumer trust in advertisements

Europeans trust all advertising communications less than Americans

Base: 57,499 US online adults (age 18+)
**Base: 15,654 EU-7 online adults (age 18+)*
Source: North American Technographics Online Benchmark Survey (Part 1), Q2 2012 (US, Canada)*
** Source: European Technographics* Online Benchmark Survey, Q3 2012*

SOCIAL SHARING

Social sharing amplifies your message and your lead generation efforts, but getting people to share isn't easy.

People are motivated to share by:

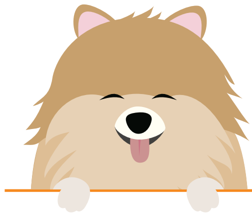
1. **Reputation enhancement**
2. **Access to something exclusive**
3. **Opportunities for co-creation/authorship**
4. **Competitions**
5. **Altruism**

> "When it comes to sharing on social, pick the channel where you can best tell your story. If you're better in video, use YouTube. If you're brief and quippy, use Twitter. Pick what you like."
>
> **– Chris Brogan, CEO and Founder, Human Business Works**

Social Sharing Offers

Keep these motivations in mind, and try to align them to your social offers. Consider adding some extra oomph to your social campaigns and messaging by employing one of these tactics:

- **Refer-a-friend:** Create a compelling offer for both the referrers and referees. This taps into the same power as peer-to-peer recommendations—people are far more likely to trust their friends. Of course, this is also a fantastic way to collect lead information.
- **Sweepstakes:** Create a contest and get your entrants to spread the word on your behalf. Everyone loves winning, and contests are highly shareable on social channels. You can also gain important lead data through entry forms.
- **Polls and voting:** Everyone has an opinion, and most people are happy to share. Build relationships with campaigns that engage your audience and compel them to share their opinions. You can also gain valuable information about your leads' likes and dislikes, which can help you plan future campaigns.
- **Flash deals:** Create a sense of urgency with a strong CTA and a time limit—these cause leads to act quickly. Flash deals can quickly increase brand awareness and bring in new customers.



Utilizing the 80/20 Rule for social

So what kind of content should you post on social channels? Social media has many different functions, including lead generation, brand awareness, and relationship building. To be effective, you need a good balance of promotional content and thought leadership. We advise marketers to use the 80/20 rule—80% of your content should be informational/educational, and 20% should be self-promotional.

FACEBOOK

Facebook boasts the largest user base of any social network, so it's essential that you have a presence there. Formerly dismissed by marketers as too "personal" for business correspondence, it's become an increasingly common way to deliver messaging. With more than 1.1 billion users, and many opportunities for paid advertisements, Facebook is a critical element of any lead generation campaign.

Contagious Content

So what works on Facebook for lead generation? The key is to strike a balance between offering content that is valuable for brand positioning, and offering content that is fun and shareable on social channels. If you can show value to your followers, your lead generation efforts can have a true network effect.

At Marketo, we are always experimenting with different types of ads, new content, and eye catching visuals. We also track our success using Marketo and Facebook Insights. We've found that to successfully generate leads on Facebook, you need:

1. **Compelling messages**
2. **Eye catching visuals**
3. **Mass audience appeal and shareability**
4. **A clear CTA**
5. **Personality!**

> "Facebook is great because it allows you to humanize your brand—companies often forget that people aren't 'all business' when it comes to social media. They want to have fun, not engage with robots."
>
> **– Carra Manahan, Marketing Programs Specialist, Marketo**

FACEBOOK

Facebook News Feed

Facebook's News Feed uses an algorithm to determine whether your posts get displayed on a user's News Feed, which is critical for lead generation. So how do you get your posts to appear? This algorithm has gone through numerous iterations, and (like Google) will continue to change over time, but it always responds to content engagement—if users and their networks interact with your content, it will show up in the feed. If not, it will be dropped.

Here are some other factors that the algorithm considers:

- **Affinity:**
  How close is the relationship between the user and content?
- **Weight:**
  What type of action was taken on the content?
- **Decay:**
  How current is the content?
- **Post Types:**
  What types of posts does a user typically interact with?
- **Hide Post/Spam:**
  What types of posts does a user usually hide or mark as spam?
- **Clicking on Ads:**
  Do users interact with the ad?
- **Device Considerations:**
  Can multiple devices handle your content?
- **Story Bumping:**
  A post may be older, but is it still being interacted with?

Promoted Posts

Amplify your lead generation and engage your followers (and your followers' networks) by putting paid efforts behind some of your top posts. Remember, when using promoted posts for lead generation purposes, there should always be a strong CTA—ask followers to download an asset, attend a webinar, or learn about a new product. You want people to have something to click on.

How do promoted posts work? You can promote a post (including status updates, videos, blog posts, and offers) directly from your News Feed. Any post you promote will automatically appear higher in the News Feed, so more people will see it.

You can also determine a specific budget for each promoted post. Your budget will depend on your personal business objectives, but Facebook prices promotions based on your fan count and budget—they can range from $10 to $1000.

At Marketo, we promote assets and daily blog posts with strong Facebook CTAs, and we've seen a big uptick in visibility since we started doing so. Recently, we created a Facebook promoted post for our *Definitive Guide to Engaging Email*, which led to 9,923 clicks; 6,765 actions ("likes" and comments); a 3.976% click-through-rate; and cost us $0.70 per click.

Promoted Facebook post from Marketo

FACEBOOK

Facebook Ads

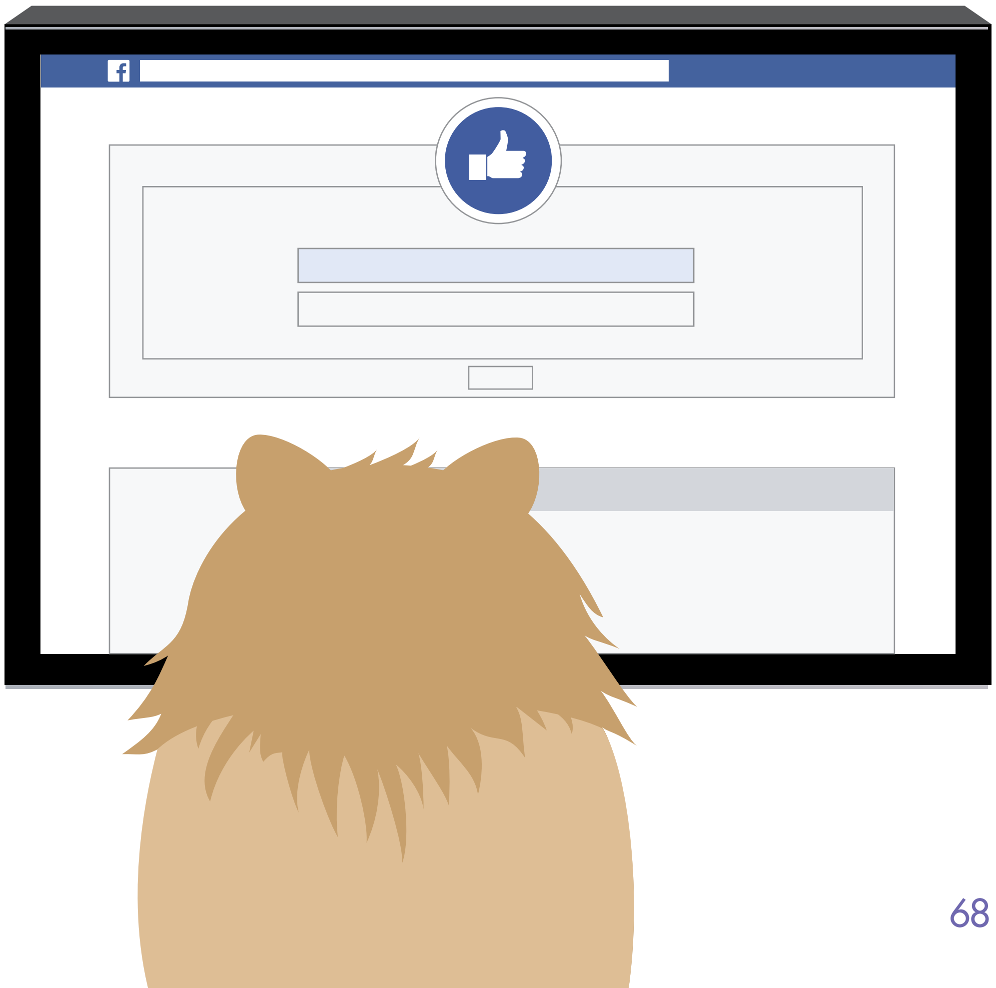
Facebook ads provide highly targeted opportunities to reach your audience. They appear on the right side of a user's screen, and are similar to traditional Pay-Per-Click (PPC) ads—you place a bid on how much you want to pay per click, or you can pay per thousand people who will see your ad. And much like a typical PPC ad, the cost depends on the popularity of your keyword terms.

You can choose to link Facebook ads to pages on your website, or to your Facebook page to get more "Likes". You can also target Facebook ads based on a variety of demographic criteria including location, job title, age, industry, gender, and more.

Custom Audiences

If you're using Sponsored Stories or paid ads, you can target a specific set of users, or custom audiences, with whom you've already established a relationship—either on or off of Facebook. These audiences can be defined by the following attributes:

- Email address
- Facebook user ID
- Phone number
- Facebook App user ID
- Apple IDFA
- Location
- Age
- Gender
- Education
- Interests
- Connections



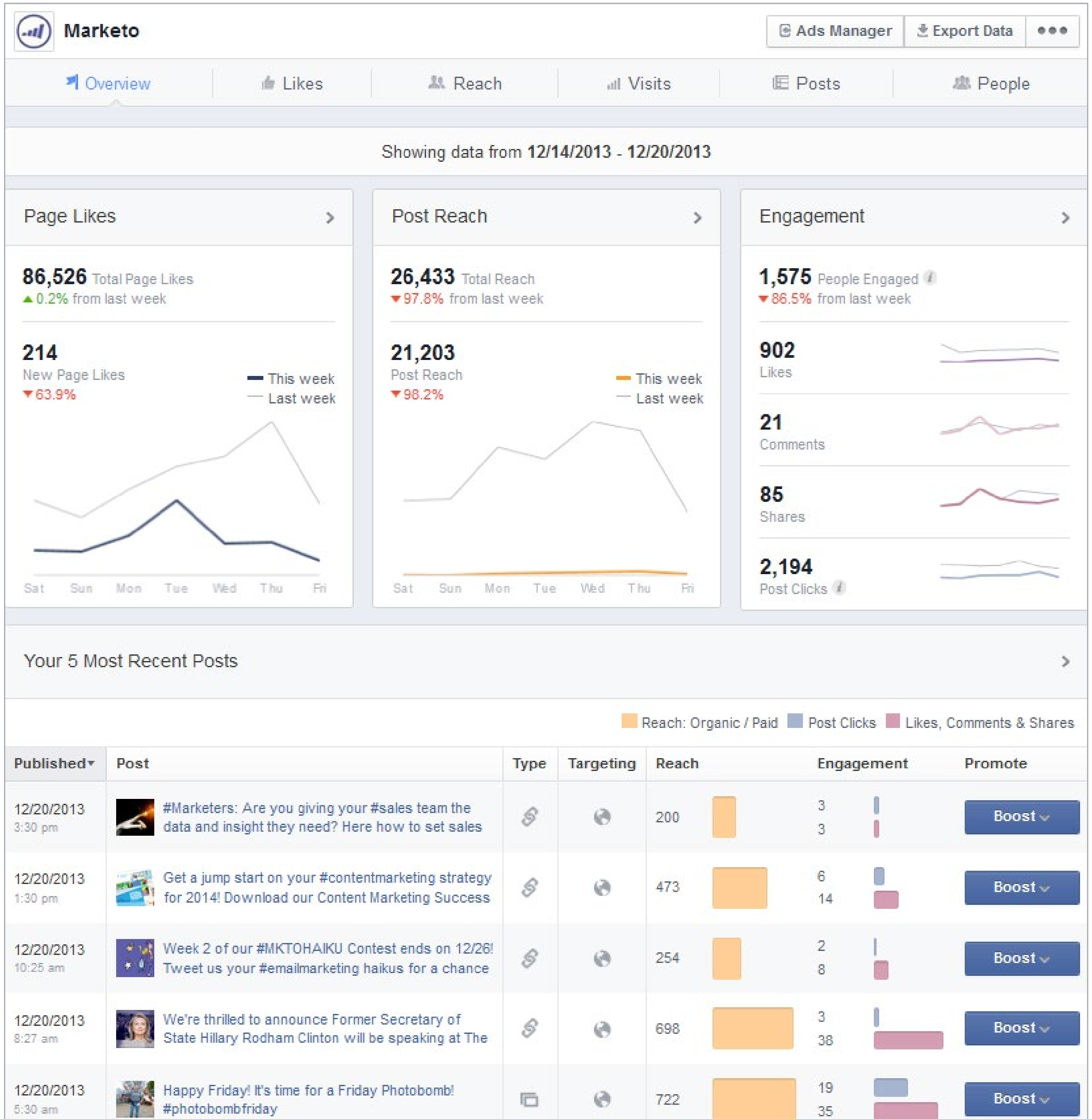
FACEBOOK

Tracking and Results

Facebook's Page Insights application provides fantastic analytics, tracking a variety of engagement and ad performance metrics. Leveraging this data internally can help you begin the conversation about your program ROI on social.

Page Insights lets you see:

- Page "Likes"
- Post reach
- Engagement
- Organic/paid reach per post
- Post clicks
- Post "Likes"
- Comments
- Shares



Facebook's Page Insights analytics

TWITTER

Think of Twitter as a virtual water cooler for marketing professionals: it's a vibrant community where businesses can generate leads, and thought leaders can discuss relevant industry topics. With 218 million users, Twitter can't be ignored.

At Marketo, Twitter helps us foster continuous, real-time engagement with our customers and prospects. We use Twitter to spread the word about specific product offerings, and as a forum for potential customers to learn more about us and our products. And like Facebook, Twitter offers many opportunities for marketers to collect and generate leads.

Promoted Tweets

We've had great success with Promoted Tweets, a form of paid ads that appear in a user's feed, targeted to followers and users who fit our criteria. Our Promoted Tweets contain timely and engaging offers, like contests for free trips to industry events, or links to relevant thought leadership. We use Promoted Tweets to create demand for new content assets, upcoming events, or demos.

Every Promoted Tweet that we run leads to a form, which improves our chances of gaining user data. Like Facebook ads and Google Adwords, Promoted Tweets use a Cost-Per-Click (CPC) pricing model.

Twitter enables you to target tweets based on the following criteria:

- Interests
- Keywords in timeline
- Gender
- Geography
- Device
- Similarity to existing followers

Marketo also uses Promoted Tweets in Twitter searches. These tweets target users based on particular keyword and hashtag searches.

Here's how Promoted Tweets appear in a user's timeline:

Promoted tweet in timeline

For tweets promoted in search results, we run two offers every two weeks, with three different tweets focusing on 15 keywords and five countries. Fresh, relevant content offers with the right messaging yield click-through rates of up to 17%, with a cost-per-prospect at around $14. This, of course, will vary based on your offer and the relevancy of your content.

We always see significant spikes in relevant tweets during industry events, so we decided to capitalize on that, using Promoted Tweets in search results during key conferences such as Dreamforce. This allows us to be part of relevant conversations while the conversations are still hot. By targeting event-specific hashtags and relevant keywords like "lead management", we can tap into prime lead-generating moments. Being a part of real-time conversations means pouncing on real-time opportunities.

TWITTER

Promoted Accounts and Trends

Twitter also offers two additional promoted ad options—Promoted Accounts and Promoted Trends. With Promoted Account ads, businesses can make their Twitter accounts show up under the "Who to follow" list on your Twitter page. This can be targeted based on who a user typically follows, whether it's a similar advertiser or an industry thought leader.

Promoted accounts can also be placed in search results when someone searches for a particular topic or hashtag.

A Promoted Account ad from Pulsar, placed among organic "Who to follow" suggestions

Promoted Trends enable a business or an individual to promote a particular trend or hashtag, which appears on the left-hand side of a user's screen, under "Trends". Note that promoted trends carry a hefty price tag—according to Mashable, placement costs about $200,000.

In this "Trends" list, GoPro Camera's promoted hashtag tops the list.

TWITTER

Twitter Lead Generation Cards

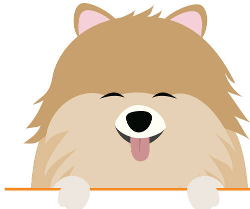
Twitter Lead Generation Cards permit businesses to collect lead information directly from Twitter. How do these work? When individuals expand your tweet, they see a form, a description of your compelling offer, and a CTA. Twitter handles, names, and email addresses are already filled in, so all a lead has to do is click the CTA.

Twitter Lead Generation Cards can also sync to your marketing automation tool, but note that Lead Generation Cards only have a full name field—most marketing automation tools collect names in a first and last name field. Also, Twitter Lead Generation Cards do not capture company data. Because of this, you can't (yet) push the lead information to most CRM tools.

Tracking and Results

When people choose to follow you on Twitter, you'll be notified and can review their conversations in dedicated streams. This helps you identify opportunities to engage.

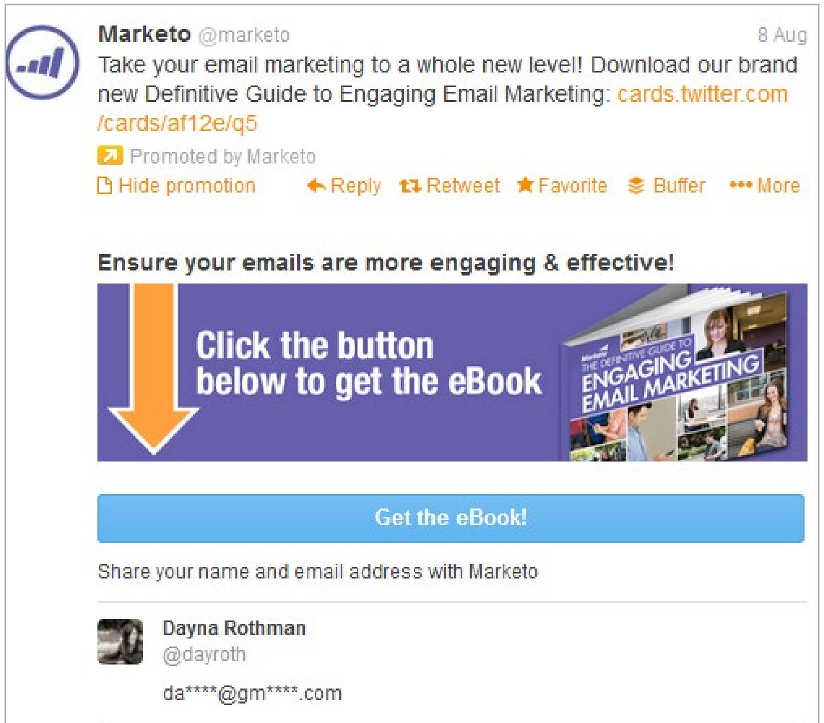
We've seen immediate results from our efforts on Twitter: our average lead-conversion rate from emails and online campaigns is between 2-3%, but some of our Twitter campaigns have yielded conversion rates as high as 14%.



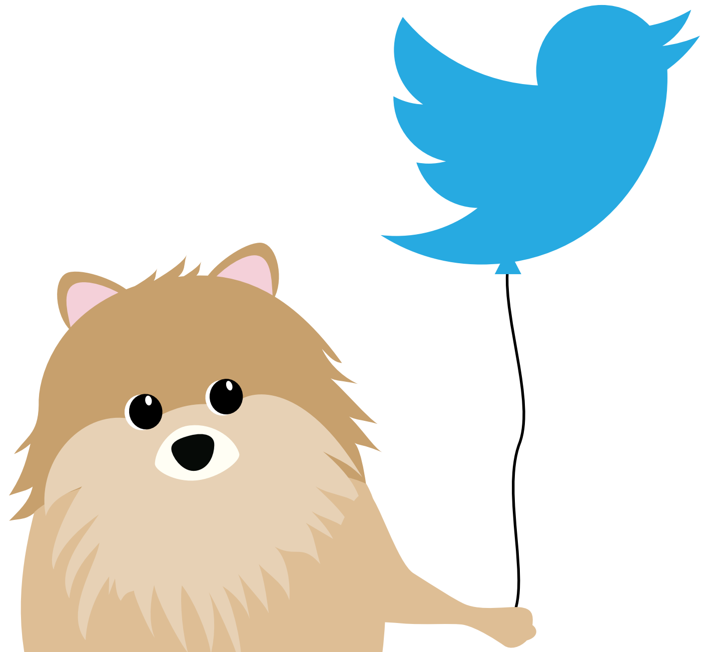
Twitter Words of Caution

A little self-promotion is good for business, but if your entire tweet history is about you and your company, you're doing it wrong.

Use the 80/20 rule: 80% of your content should be helpful or entertaining, 20% should be promotional



A Twitter Lead Generation Card from Marketo



LINKEDIN

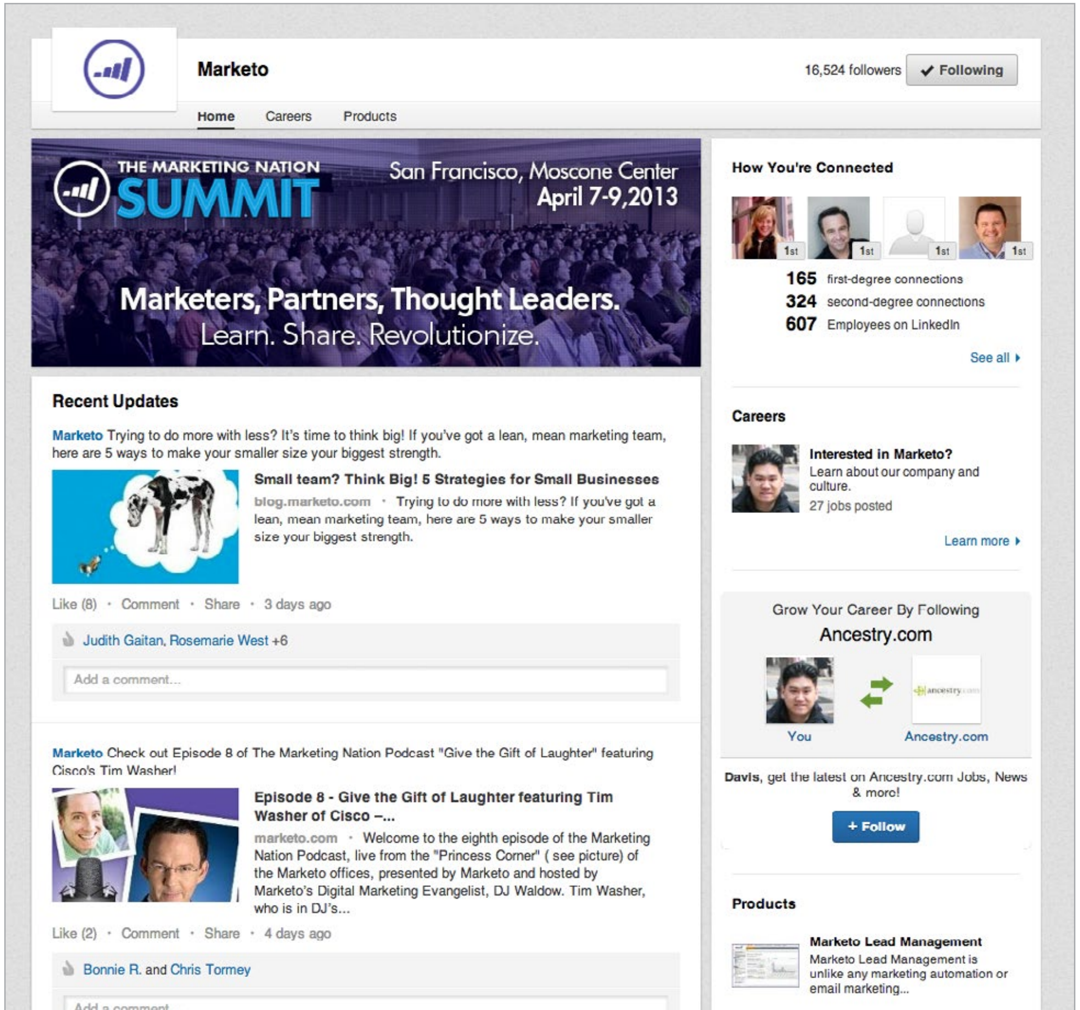
LinkedIn goes beyond personal profiles and status updates; it's a great resource for networking, influencer relationship building, and lead generation opportunities through paid programs. Because users visit the site for purely work-related purposes, LinkedIn lends itself to making business connections.

Company Page

Building out your company page is the first step to optimizing LinkedIn for lead generation. Your company page tells users who you are, what you do, and why they should follow you.

Follow these key best practices when building out your LinkedIn company page:

- Optimize your company page for keywords—people frequently run searches on LinkedIn, so make sure you show up in results.
- Add tabs to your company page—these are usually "Careers", "Products", and "Insights". Your "Products" tab should be optimized for search.
- Post on LinkedIn at least once daily to establish your presence.
- Consider adding videos and other media to your product pages to further engage users.



Marketo's LinkedIn page

LINKEDIN

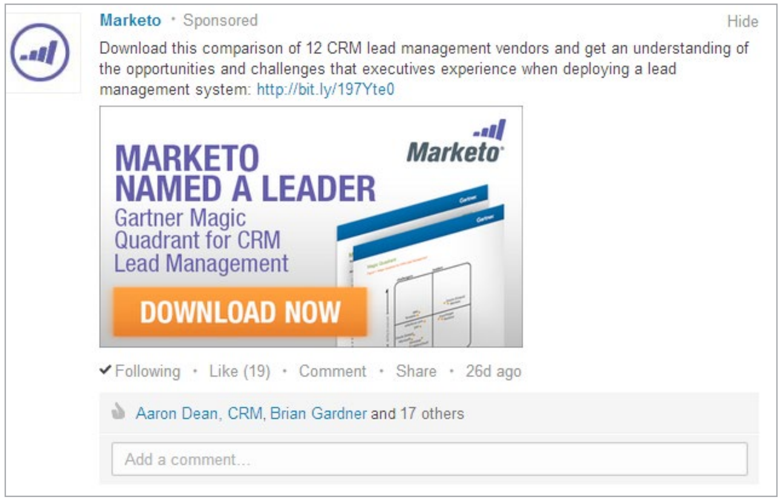
LinkedIn Sponsored Updates

To get into the lead generation game, LinkedIn began offering Sponsored Updates, allowing companies to put paid promotions behind status updates. These promoted updates are seen by your followers and targeted users outside of your follower network. Like all other social ads, LinkedIn updates should include a visual, and then link to a gated asset.

Sponsored Updates allow you to target users—you can choose to include or exclude users based on the following criteria:

- Location
- Company name
- Job title
- Skills
- School name
- LinkedIn Group associations
- Gender
- Age

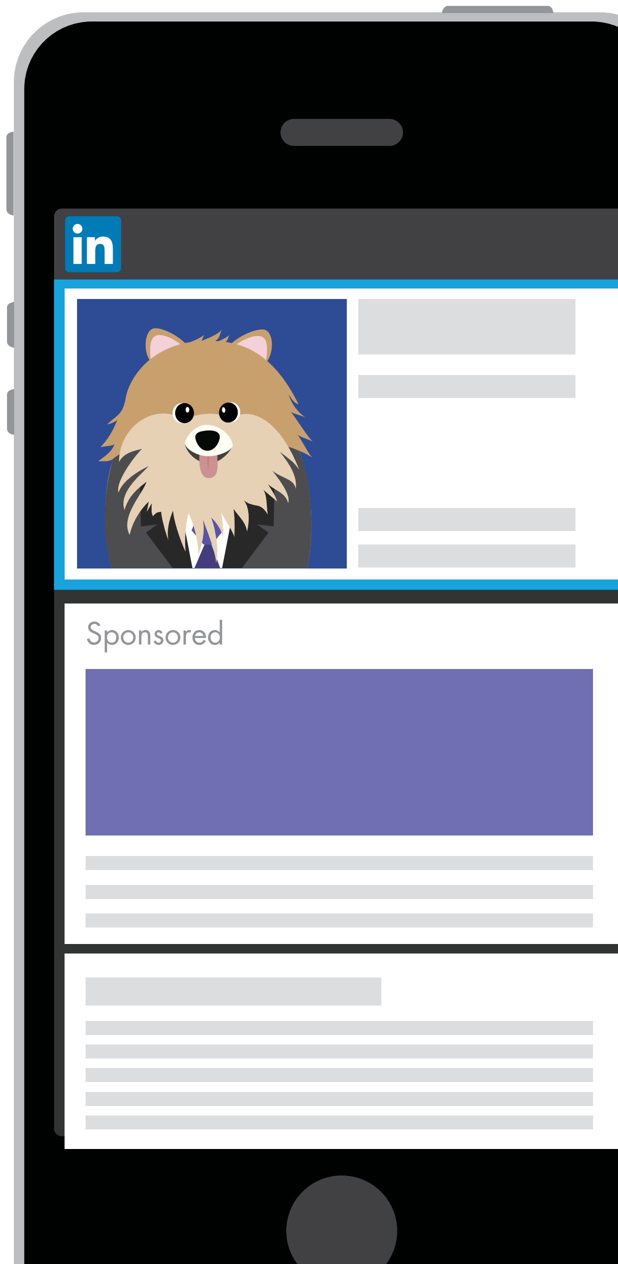
A Sponsored Update from Marketo on LinkedIn



LinkedIn Ads

LinkedIn ads give companies the chance to target their audience in powerful, unique ways. How? The information found on a user's LinkedIn profile is different than other social networks, and it's particularly helpful for businesses. This data maps well to the lead data you want from users—such as job title, company, industry, geographic location, and other demographic targeting.

LinkedIn allows you to customize your ads—you can opt for text-only ads, images, or video ads. However, according to LinkedIn, adding an image to your ad can bring you 20% more clicks.



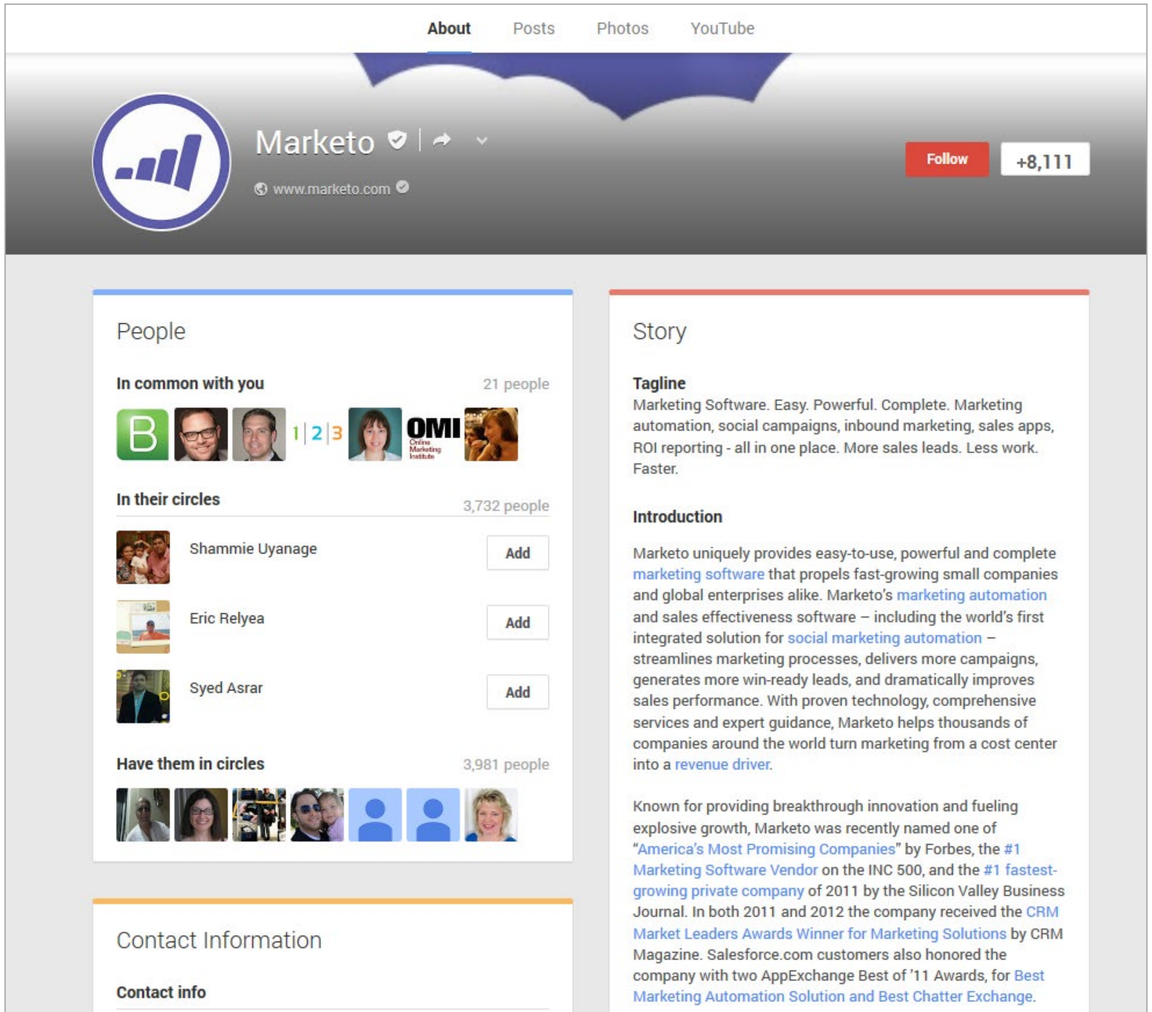
GOOGLE+

Google+ is quickly becoming an essential part of any business's social media strategy, but it's also a must for lead generation. Already boasting 90 million users, Google is making Google+ accounts mandatory for all Gmail users and those who want to post comments on YouTube. Google+ also now plays a major role in SEO.

About Us Page

Use the "About Us" page on Google+ to give audiences a quick overview of your business. From there, you can link to specific pages and services, directing potential customers to the most important pages on your website. Make sure your copy is SEO friendly, but—as always—avoid keyword stuffing.

On Marketo's Google+ "About Us" page, note that we include our tagline, keywords, and links that direct viewers to our highest ranking pages.



Marketo's Google+ "About Us" page

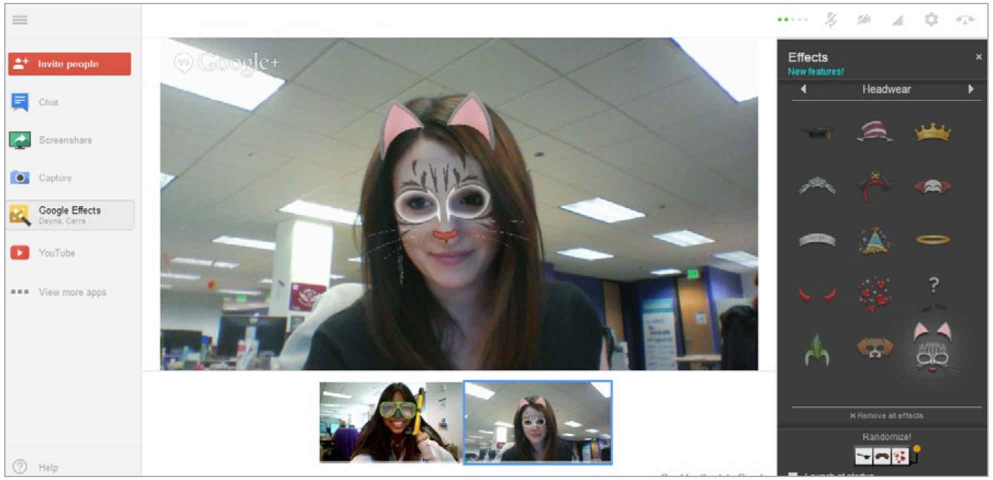
GOOGLE+

Claiming Ownership of Your Content

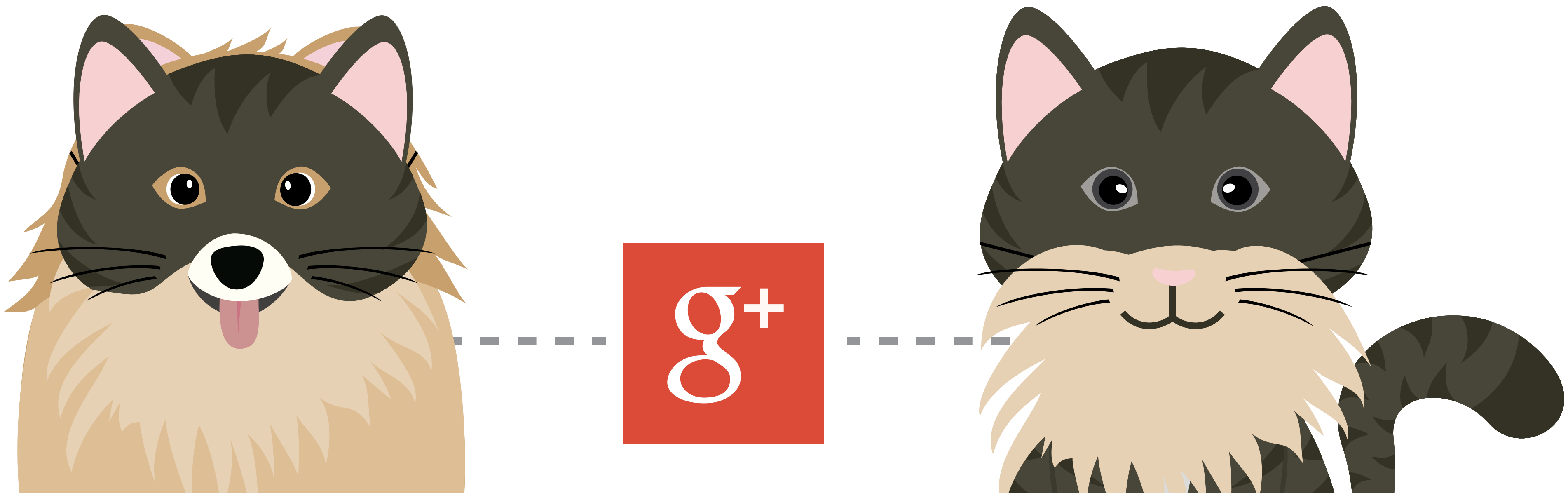
We've already discussed Google AuthorRank in our chapter about SEO, but it's worth noting that Google search results greatly favor those who engage with Google+. Google Authorship is how Google authenticates authors, and how it begins to "trust" you as a quality source of content.

Google+ Hangouts

Google+ Hangouts are a great way to generate buzz, sharing, and brand awareness. Gather thought leaders in your industry for a panel or a topical chat. Send out invites to your customer and prospect base, and make sure you promote heavily on social.



Jazz up your virtual meetings or panels with fun effects in Google+ Hangouts



SLIDESHARE

Readers are inundated with text, which means marketing professionals can't rely solely on whitepapers and blog posts to reach prospects and customers. It's now vital to include visual elements in all of your marketing campaigns.

SlideShare is a service that hosts your slide decks and presentations online, but it's also much more—it's an essential part of any successful content marketing strategy, and a powerful social community with a reported 60 million monthly visitors.

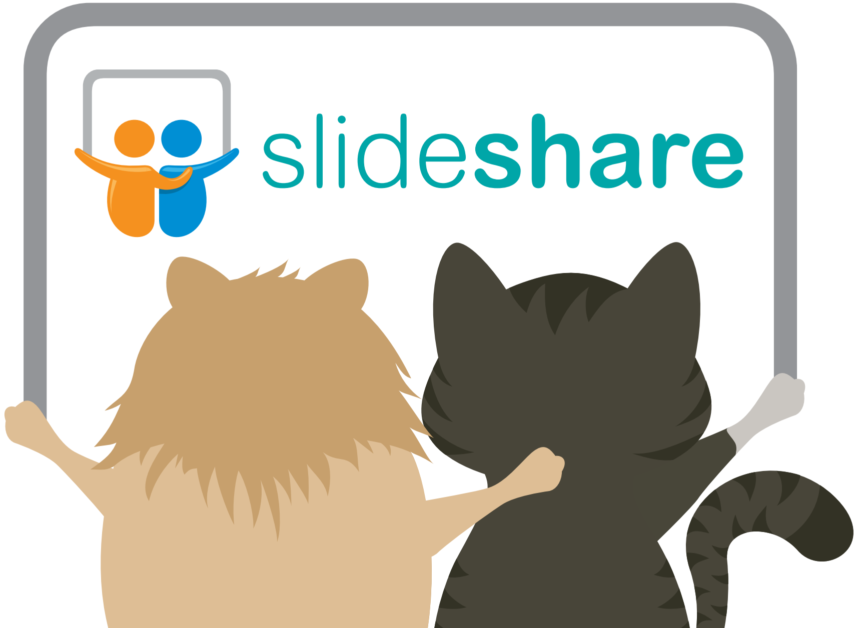
Creative Topics and Visuals

Content marketing through SlideShare can help you establish yourself as an expert in your field, using highly consumable visual elements. When it comes to lead generation, SlideShare can help you attract audiences who might ordinarily skim past your content. Some people might want to read a 10-page ebook, while others want to consume their information quickly and visually.

Optimizing for SEO

Creating slide presentations that rank for certain keywords can be much easier than ranking a post on your blog. To give your presentations a fighting chance in the world of search engines (as well as in SlideShare's own search results) include keyword-rich titles, descriptions, and tags. Write your titles and descriptions with SEO in mind.

SlideShare presentations are easily embedded into other sites, which will also drive SEO results. Each time someone embeds your presentation, it serves as an inbound link to your content.

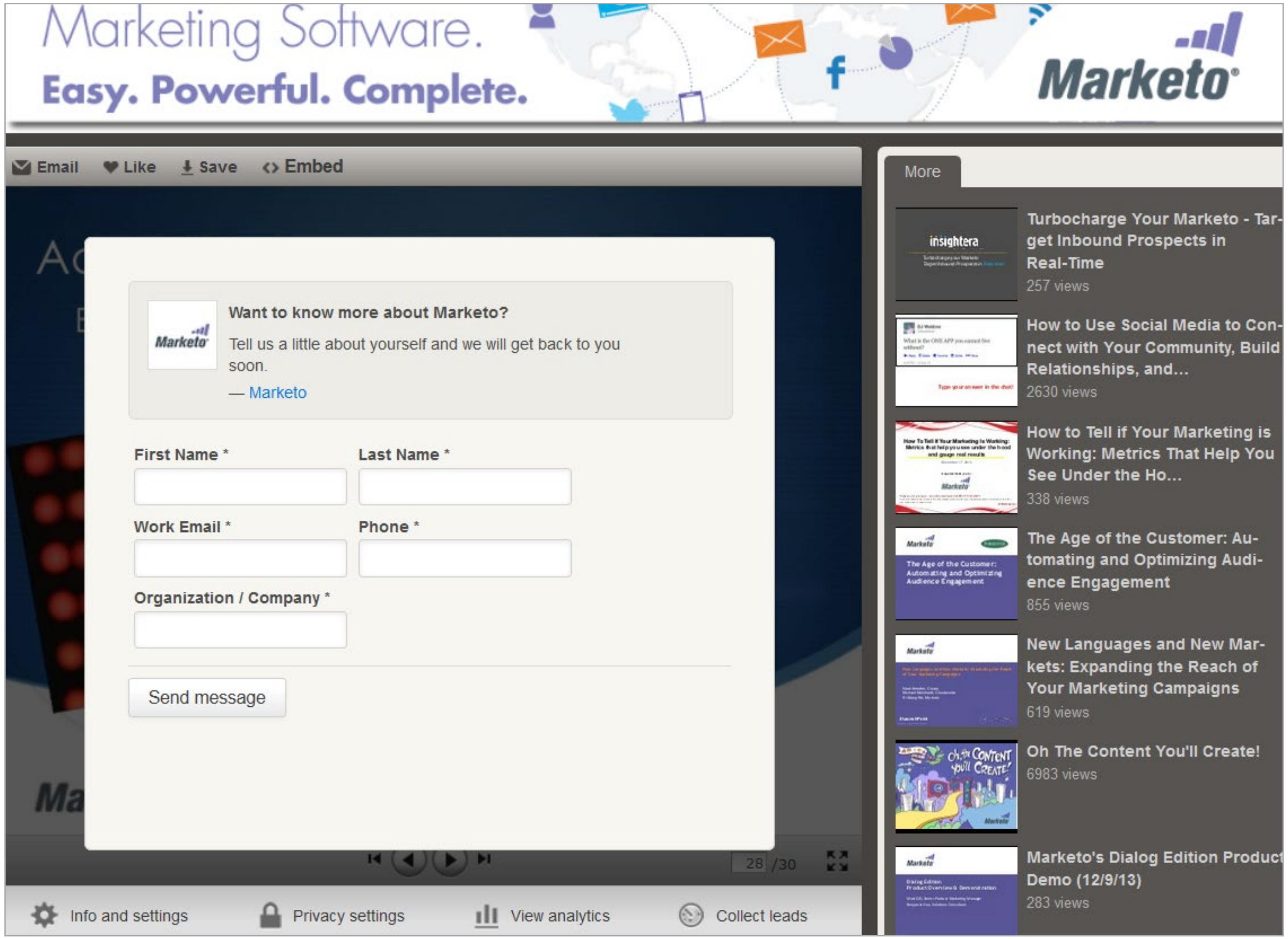


SLIDESHARE

SlideShare Forms

When it comes to lead generation, forms are where SlideShare really shines. With SlideShare, you can embed a lead generation form directly into your presentation, which pops up after some or all of your presentation is complete. Users can enter their information to download the slides and learn more about your company.

If you are using a marketing automation platform, you can sync your leads directly into your database and add them to a nurture program.



Use SlideShare forms to generate leads.

ASK THE EXPERTS: SOCIAL MEDIA AND LEAD GEN ROUNDTABLE

WHAT SOCIAL CHANNEL WORKS BEST FOR LEAD GENERATION?

"Although many think that Facebook is a terrific platform to build a strong community of fans, it's even more powerful when you turn your raving fans into quality leads that you can communicate with and build a relationship with outside of Facebook."

– Amy Porterfield
Social Media Strategist

"At Social Media Examiner, we've found that LinkedIn has the highest conversion rate, but Facebook delivers a higher quantity of leads for us. We have a much larger fan base on Facebook (192,000+) compared to LinkedIn (11,000+), and have multiple dedicated staff manning our Facebook account."

– Michael Stelzner
CEO and Founder, Social Media Examiner

"There are three channels that are great for lead generation. Facebook's ad interface and their targeting capabilities are impressive—you can get very granular and ensure you're reaching the right audience. LinkedIn has generally given us the best leads, because you can target by job titles, companies, company size, or industry. Lastly, we've had success with lead generation forms on SlideShare, where we host all of our slide decks, from webinar decks to shortened versions of our ebooks."

– Carra Manahan
Marketing Program Specialist, Marketo

ASK THE EXPERTS: SOCIAL MEDIA AND LEAD GEN ROUNDTABLE

WHAT IS THE FUTURE OF SOCIAL FOR LEAD GENERATION?

"Social media platforms are becoming more sophisticated in terms of giving marketers opportunities to strategically attract leads. It's no longer all about attracting fans and followers—the appeal of social media marketing is gravitating more toward turning those fans and followers into warm leads. These leads are genuinely interested in hearing from you.

– Amy Porterfield
Social Media Strategist

"Now that Twitter has introduced Lead Generation Cards, which allow advertisers to collect leads directly from paid ads, I think we will see more of this type of lead generation across the various social networks—especially as those networks become more reliant on advertisers who are seeking to generate leads."

– Michael Stelzner
CEO and Founder, Social Media Examiner

"More and more companies are investing in their brand's social presence, and at the same time, social platforms are investing in features that help drive lead generation. If you're not using social media for your lead generation efforts, you're missing out on a great opportunity. We've seen great ROI from adding a social component to almost everything we do—whether it's a simple social share button or a fun contest."

– Carra Manahan
Marketing Program Specialist, Marketo

ASK THE EXPERTS: SOCIAL MEDIA AND LEAD GEN ROUNDTABLE

WHAT ARE THE KEY SOCIAL COMPONENTS OF AN EFFECTIVE LEAD GENERATION STRATEGY?

"You need to know where your audience is spending time and have a keen understanding of their interests, likes, dislikes and overall challenges. If you can create giveaways that they perceive as highly valuable, they'll be more than happy to give you their names and email addresses in exchange. That's how list building on social media sites works best—with an irresistible giveaway, promoted on your social media channels. This not only builds goodwill and establishes your authority, it also builds your email list with people that are genuinely interested in what you are all about."

– Amy Porterfield
Social Media Strategist

"Generating leads with social comes down to offering a valuable free offer. It's important to remember why people are on social networks: to connect with people. Thus it's critical to offer up major value if you're going to interrupt their main reason for being on the network. Said another way, people using social networks have a low tolerance for overly promotional content."

– Michael Stelzner
CEO and Founder, Social Media Examiner

"At Marketo, we're aware that a social media manager doesn't just post a few tweets or Facebook statuses every day—they also have a strategy for reaching lead generation goals. To have an effective lead generation strategy, you'll need to make sure that you have awesome content, the right people, and creativity. Content is what fuels social media—without it you would have nothing to offer your audience. Dedicated staff ensure that you're following a strategy, not just using social at random. And creativity is key for breaking through the noise."

– Carra Manahan
Marketing Program Specialist, Marketo

ASK THE EXPERTS: SOCIAL MEDIA AND LEAD GEN ROUNDTABLE

WHAT DO YOU SAY TO PEOPLE WHO THINK SOCIAL MEDIA IS NOT EFFECTIVE FOR LEAD GENERATION?

"I would say they are missing out on a huge opportunity, and will struggle to build up their email lists if they don't begin to experiment with social media opportunities to attract quality leads. I would also say that their competition is very lucky!"

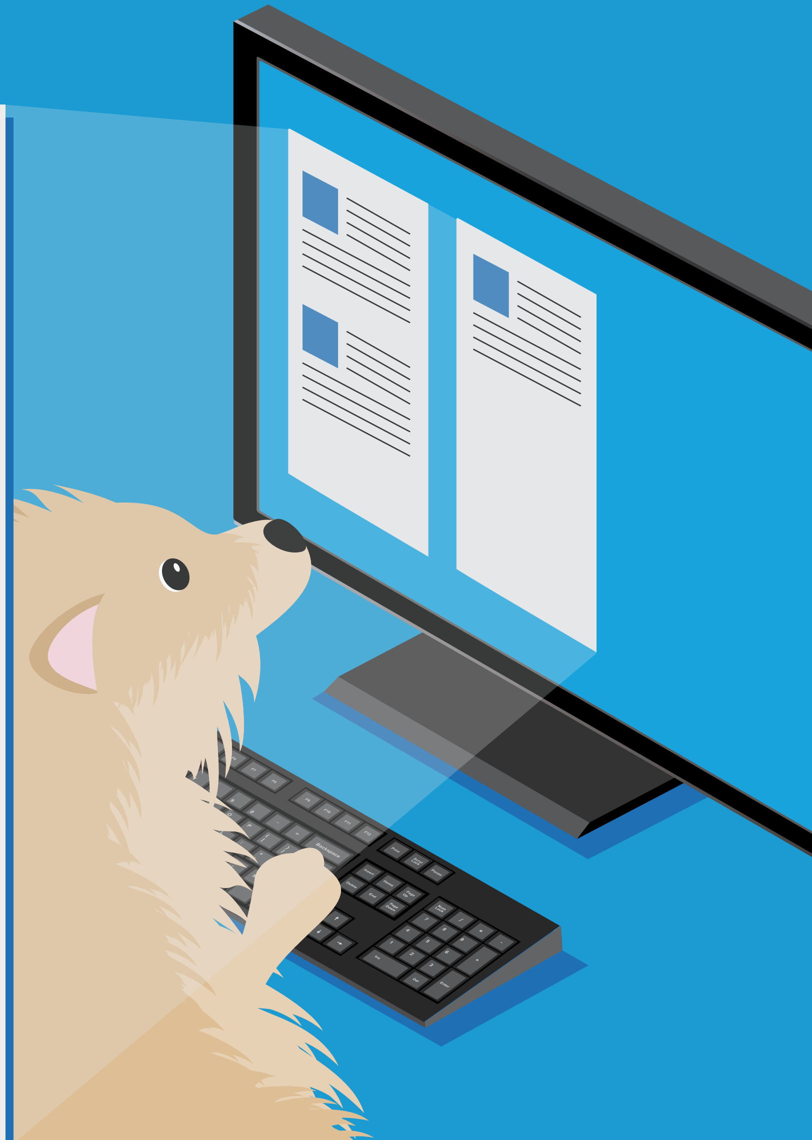
– Amy Porterfield
Social Media Strategist

"Social networks are the fastest and lowest cost way to generate leads, bar none."

– Michael Stelzner
CEO and Founder, Social Media Examiner

"People who think social media is not effective for lead generation need to give it a try! I can't stress how important it is to test before drawing conclusions. You'll need to try different methods, keeping in mind that not everything you do will be a success. Not every post on every social channel will get a ton of engagement—you need to figure out which messaging and content resonates best with your target audience."

– Carra Manahan
Marketing Program Specialist, Marketo



CHAPTER EIGHT:

EMAIL MARKETING

MAINTAINING RELATIONSHIPS WITH EMAIL MARKETING

Email is a cornerstone of many marketing campaigns. Whether you're hosting an event, sending out a new piece of content, or promoting a new service offering, email can deliver relationship-building communication at every stage of the funnel, especially to those leads that you already have in your database.

That said, marketers often struggle to generate the open rates, click-through rates, and conversions they'd like to see. In fact, according to a recent research study by MarketingProfs, the average open rate for a B2B email is 19.9%, and the average click-through rate is 5.4%. According to marketing solutions firm VerticalResponse, the average open rate for a B2C email is between 15-20%, and the average click-through rate is around 6%.

Today's buyers have short attention spans and intelligent browsing habits—they want personalized, relevant information at all times.

That's why marketers must create engaging email campaigns—not just batch-and-blast. To rise above the noise, your emails should be trustworthy, relevant, conversational, coordinated across all channels, and strategic.

Email marketing done right can help nurture leads already in your database and bring them closer to becoming a customer.

CHAPTER EIGHT: EMAIL MARKETING

EMAIL TIMING AND FREQUENCY

Time your emails depending on your audience, based on captured user data and other parameters.

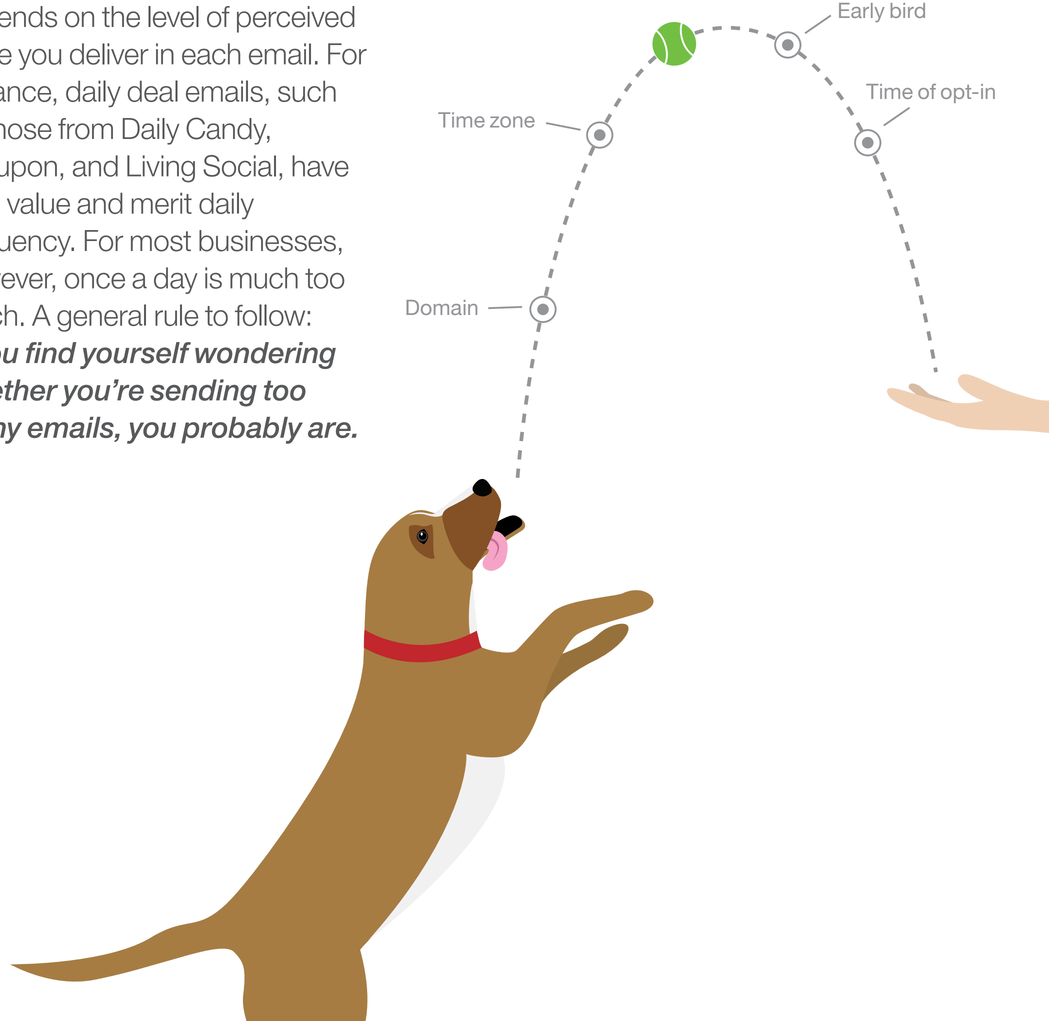
When to Send an Email

Although there is no true "best" time of day to send your emails, there are certainly some best practices you can consider:

- **Time of opt-in:** If a subscriber opts into your newsletter at 2pm PST, you can reasonably assume that subscriber is often online at 2pm.
- **Early bird:** If you schedule your emails to arrive in the early morning, you can be at the top of the email pile when folks arrive at the office. Note that as smartphones become more ubiquitous, people check their email earlier and earlier in the day—often long before they actually get into work.
- **Time zone:** By capturing IP addresses at opt-in, you can segment your list and send emails based on where subscribers live, so that your emails reflect the correct time zone.
- **Domain:** Send emails to subscribers who register personal email domains (gmail.com, yahoo.com, etc.) during the early morning and evening hours. Those using work-related domains (company.com) should receive emails during the day.

How Often to Send Emails

We're often asked how often marketers should send emails, and ultimately, the answer depends on the level of perceived value you deliver in each email. For instance, daily deal emails, such as those from Daily Candy, Groupon, and Living Social, have high value and merit daily frequency. For most businesses, however, once a day is much too much. A general rule to follow: ***If you find yourself wondering whether you're sending too many emails, you probably are.***



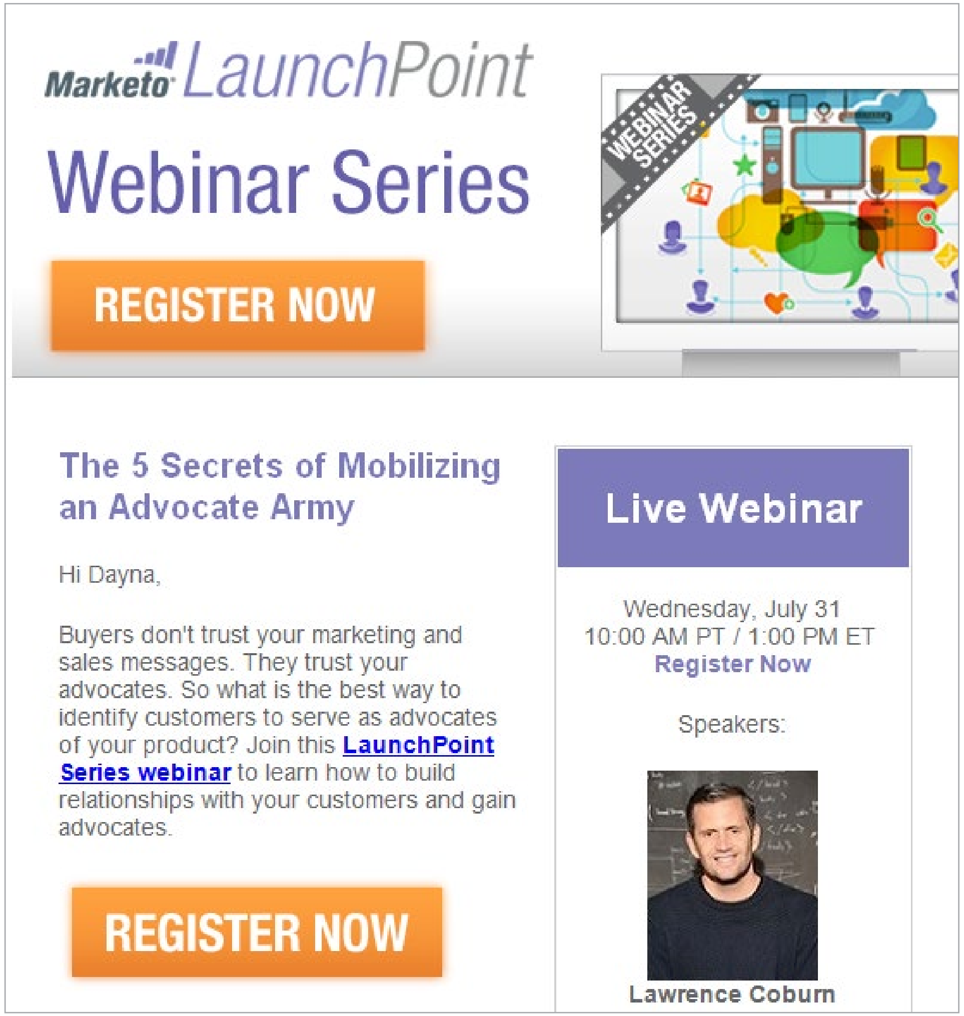
EMAIL CALLS-TO-ACTION

A strong, clear call-to-action (CTA) is a crucial element of any great lead generation campaign.

If you have three things to promote this week, but you don't want to email your database three times, it might seem wise to combine the offers with an email that covers all three. Unfortunately, this can dilute your message and confuse the recipient. You want your recipient to know exactly where to focus and what to do.

We covered CTAs in our section on content, but here's an example of a strong email CTA (on the right). It's obvious what we want the reader to do—attend one of our LaunchPoint partner webinars.

Instead of driving your readers directly to your website homepage, it's always better to point them to a landing page created specifically for your offer (see our section on landing pages for more landing page best practices). Same rules apply: ***make sure your CTA stands out and that the copy is compelling.***



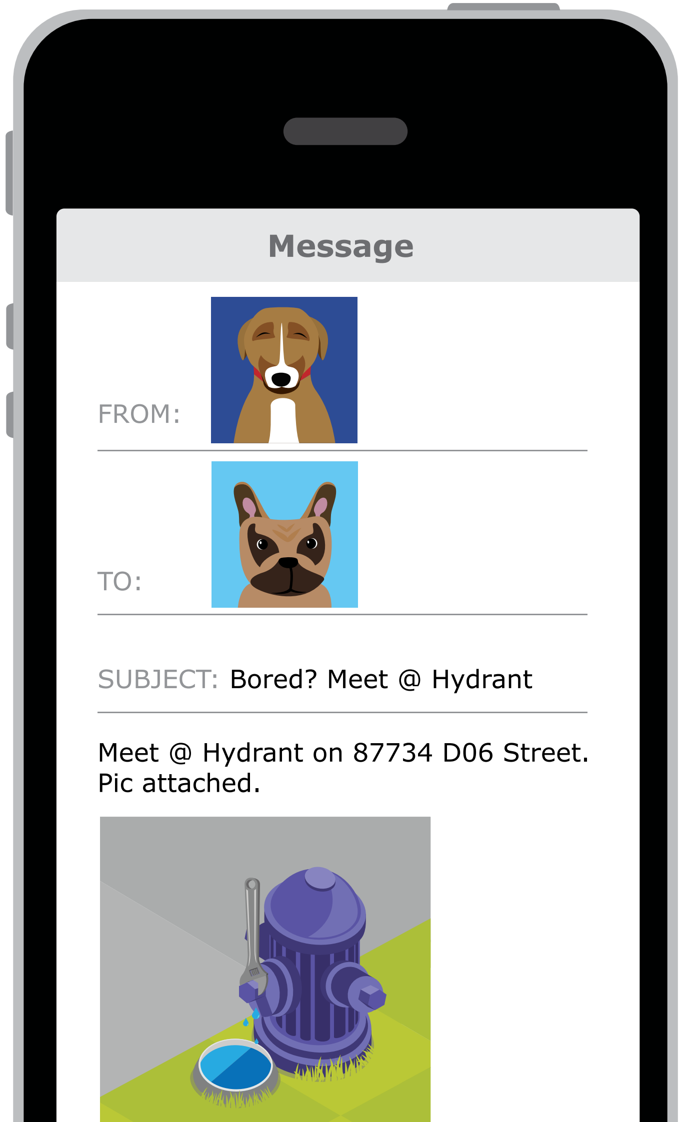
Email with a strong CTA

EMAIL SUBJECT LINES

Your subject line, in conjuntion with a trusted From address, is what drives opens. Make it clear and concise, and don't be afraid to try something creative—you can always A/B test before sending it to your entire list.

Here are some best practices to improve your open rates:

- **Frame your subject line as a question.** Questions compel readers to open your emails as they pause to consider the answer. Nab their attention with a simple question mark.
- **Try a list.** This is where your "Top 10" and "5 Tips" subject lines come in. People gravitate towards short, easily digestible information.
- **Make a psychological appeal.** According to Copyblogger, the subject line "You are not alone" gets an average open rate of 90%. As you write your subject lines, keep basic human psychology in mind.
- **Be conversational.** Don't be afraid to use conversational language in a subject line. Your leads are people, so use natural language that references real-life interactions.



EMAIL COPY

An opened email is one thing; a read email is another. There is truly an art to crafting email copy that will convince someone to click.

Remember, your readers will scan through hundreds of emails on any given day, making quick decisions about which are worth their time.

At Marketo, we send thousands of emails, and we test every email design and copy to ensure that our readers click through.

Here are some tips for writing email copy:

- **Short and sweet:** We find it's best to say things simply. Try using short sentences and bullets to make your emails easy to scan.
- **Cut out the marketing-speak:** Marketing jargon can immediately turn off your reader. Make your copy clear and conversational.
- **Address a pain point:** Your email copy can speak to a problem you can solve for your reader. Offer a clear, concise solution.
- **Don't forget to proofread:** Multiple people should review every email you send for spelling, grammar, and punctuation errors. If you can, set your email aside for a few hours before sending—with fresh eyes, you're more likely to catch mistakes.

ASK THE EXPERTS: EMAIL MARKETING ROUNDTABLE

TRUE OR FALSE: You can have the most compelling subject line, the best call-to-action, and an unbelievable offer, but if you don't have a list of email addresses to send to, nothing else matters.

"This is true, but to be more precise, you need a *quality* list. A list of unengaged, unresponsive contacts is nearly as bad as not having a list at all. The size and quality of your subscriber list is a direct indicator of how successful you will be at reaching your email marketing goals."

– Adam Holden-Bache
CEO and Managing Director, MassTrasmit

"Absolutely true. Email marketing begins with your database. I am always amazed when my students and clients tell me that growing their list is not one of their priorities! Your newest subscribers are often your most active subscribers and so, logically, it makes sense to prioritize growing your database. And the bigger your list, the more opportunities you have for conversions."

– Katy Pay
Co-Founder, Plan to Engage

"This is absolutely true. An email list—ideally one that is obtained through permission-based best practices—is a critical aspect of any solid email marketing program. It starts with the opt-in form—setting expectations around content, value, timing and frequency. Then it's all about delivering on that promise. This is where trust is earned or lost. The list. The list. The list!"

– DJ Waldow
Digital Marketing Evangelist, Marketo

ASK THE EXPERTS: EMAIL MARKETING ROUNDTABLE

WHAT ARE THE BIGGEST MISTAKES PEOPLE MAKE WHEN DESIGNING EMAILS FOR CONVERSION?

"They don't offer value to the recipient. They make the content about what they want people to know, rather than what people want to hear."

– Adam Holden-Bache
CEO and Managing Director, MassTrasmit

"Not designing their emails for conversions! I find that most email marketers (or their designers) are actually designing their emails to be aesthetically pleasing, rather than focusing on designing for conversions. You need to test your CTAs and copy, and make the most of your headlines and imagery to support your main objective. Too many equally weighted CTAs make it confusing for the reader as opposed to setting a clear task for the reader to follow."

– Katy Pay
Co-Founder, Plan to Engage

"They forget about mobile. If you look at the mobile email statistics, usage has been growing rapidly over the past few years and will continue to do so. More and more people are viewing and interacting with emails on their smart phones. However, very few email marketing messages are optimized for mobile. This is where responsive design comes into play."

– DJ Waldow
Digital Marketing Evangelist, Marketo

PAID EMAIL PROGRAMS

Paid email programs extend your reach, attract your target audience, and increase the size of your database. With paid email, a sponsored email to high-quality targets is sent out on your behalf. Pick a reputable organization with a high-quality database that is filled with your target audience.

Targeting with Paid Emails

Which organizations in your industry are known for relevant news or particularly engaging commentary? Check to see if those companies offer sponsored email programs. If you are sending emails out through a well-respected organization in your space, they probably have an organically grown list that speaks directly to your audience.

Most organizations allow you to target subscribers based on the following criteria:

- **Audience:** Who are you trying to reach? Target based on title, industry, and other demographic criteria.
- **Topics:** What topics are your audience interested in? Many vendors allow you to target based on topics that leads have engaged with in the past.
- **Region:** If you are doing a geo-targeted campaign, have your vendor segment based on location.

As you write copy for your paid email program, be aware that the recipients may or may not know who your company is, so branding and clarity are critical. Focus on bold, eye-catching visuals, a very clear CTA, and concise copy.

Vendor Selection

If you turn to a vendor for paid email programs, here are some steps we recommend that you take:

1. **Check out a vendor's media kit:** Most vendors will have a media kit on their website. Read through the kit to determine list demographics, program offerings, and payment terms.
2. **Get on the phone:** Go over program details, success metrics, and payment.
3. **Ask about data replenishing:** You want to know how large the vendor database is and how they replenish their database. Do they clean their database frequently, verifying that their list still wants to receive communications? Keep your eye on the percentage of new names in a vendor's system.
4. **Determine pricing model:** Some vendors price based on cost-per-lead, others price based on cost-per-thousand individual sends (or CPM).
5. **Negotiate, negotiate, negotiate:** Be very clear about the metrics and goals you are trying to hit. Negotiate with your vendors based on expected outcome.

PAID EMAIL PROGRAMS

Getting the Cost Down

Paid email programs can be pricey, but there are low-risk ways to try a new channel. Consider splitting the cost with a good partner in exchange for lead sharing. If you've co-created a content asset, you could find a vendor whose database is relevant to both partners. Note: ***if you plan to share leads, make sure you include the proper verbiage on your landing pages.***

Also consider trades. You might be working with a vendor that has a similar target audience to yours. What if you send out an email on their behalf, and they send out an email on your behalf? You can often cut costs by trading.

Considerations for Paid Email Campaigns

Paid email programs can be very different than emails you send to your database. When creating a paid email program, be sure to:

1. **Work with good vendors.** Make sure they update their house lists, are flexible, and are willing to negotiate. Good vendors will make their database sizes transparent, and will help you determine the best lead generation package for your business.
2. **Have a backup plan.** If you thought your email would generate 500 new leads, but you received 200, have a plan to fill in the gap. If a technical problem was to blame, some vendors will let you negotiate a make-up send.
3. **Don't be afraid to use the same content multiple times.** Every time you do a send, even to the same database, only a small percentage of people actually download/ read the asset you include. While you should never send the same email twice, you can re-send an asset in a new context.
4. **Don't send to dupes.** Particularly if you are using a vendor who has a similar database to your own, you want to prevent simultaneous sends to the same people. Consider using a third- party service like Optizmo to prevent duplicates. Send Optimizo your list and your vendor's list, and Optimzo will send back one concise list.
5. **Ask for a make-up drop.** Sometimes your send just doesn't go as well as expected. Be aggressive and ask that the vendor re-send your email.
6. **Evaluate over time.** Be sure to revisit your program a few months later—your success numbers may have changed.

EMAIL MARKETING METRICS

Always measure your email campaigns, whether they are emails to your database or through a paid program, to drive testing, iteration, and program successes.

What you measure will depend on your priorities. Here are seven common email metrics to consider measuring:

1. **Sent:** The number of emails that actually moved through your sending mail server/marketing automation tool. Marketo counts "sent" emails as valid contacts who were sent an email.

2. **Delivered:** The number of emails that were sent and not rejected by the receiving server—note that "delivered" emails don't necessarily land in the recipient's inbox.

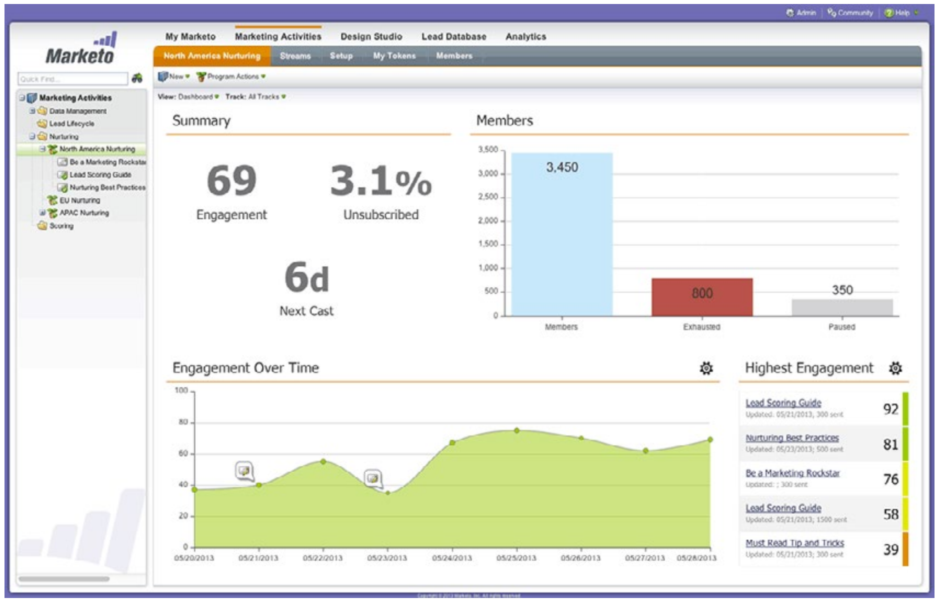
3. **Bounced:** The number of emails that were rejected by the receiving server.

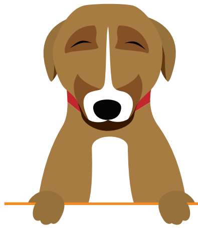
4. **Open/Open Rate:** How many recipients opened and viewed the email. Marketo defines "opens" as emails that were opened at least once, and the "open rate" as the number of opens divided by the number of delivered emails.

5. **Clicks/Click Rate/Click-to-Open Rate:** The rate at which leads click on a link, button, or image within your message. The rate is only calculated once—so if a recipient clicks numerous times, the click is only recorded once. The "click rate" is the total number of clicks divided by the total number of emails delivered. The "click-to-open" rate is the total number of clicks divided by the total number of opened emails.

6. **Unsubscribe Rate:** The rate at which leads clicked the "unsubscribe" link in the email and then successfully opted-out.

7. **Marked-as-Spam Rate:** The rate at which recipients reported your email as spam, divided by the number sent or delivered.



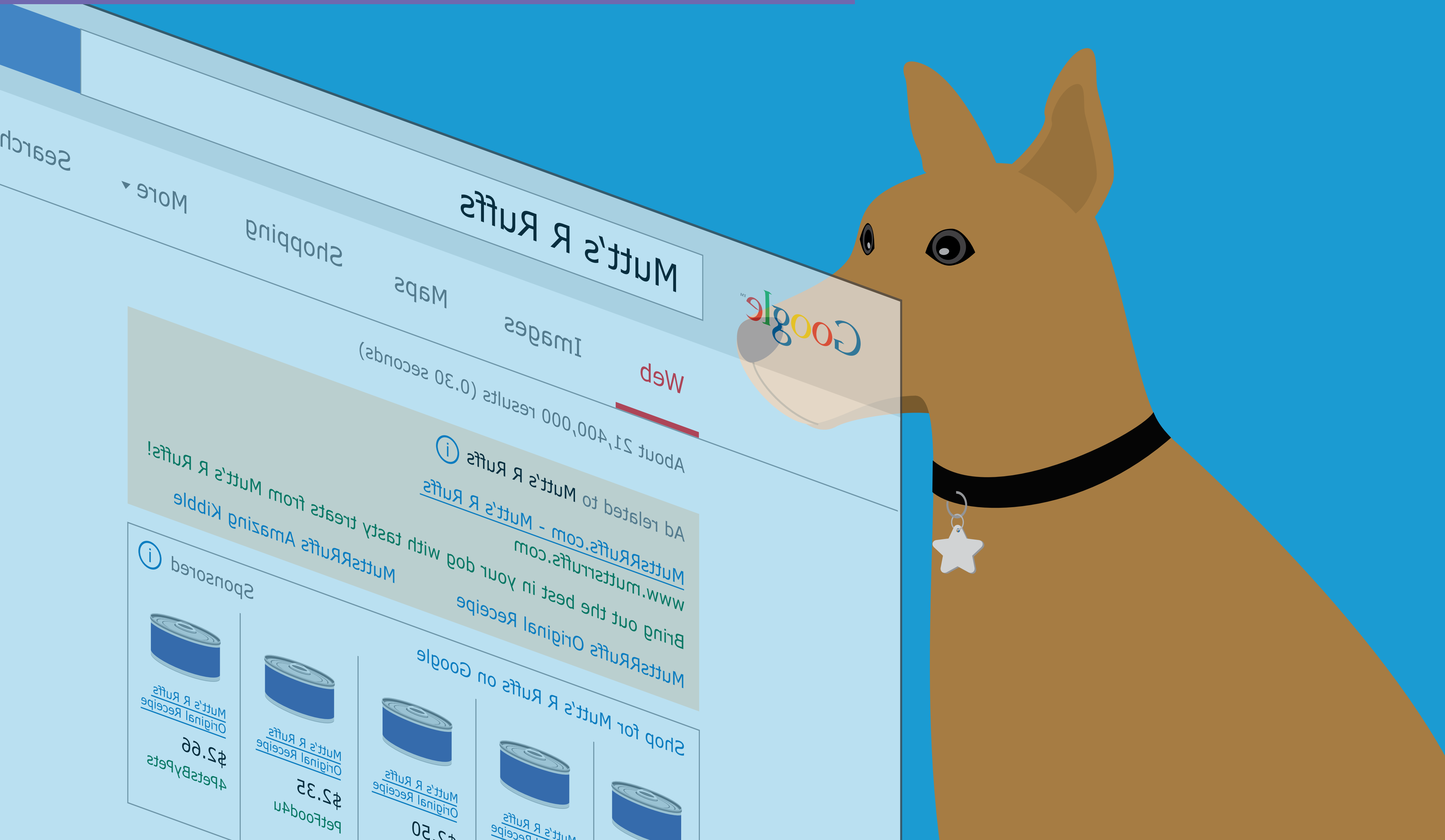


Marketo Engagement Score

The Marketo Engagement Score is a proprietary algorithm that our Data Science Team created to determine exactly how engaging each message is. It combines multiple data points such as clicks, opens, conversions, unsubscribes, and program successes, and then applies a statistical algorithm to create a single measure of engagement.

Marketo Engagement Score

CHAPTER NINE:
PAID PROGRAMS



PAID PROGRAMS AND LEAD GENERATION

While inbound marketing has been getting a lot of buzz lately, a well-rounded marketing mix should include both inbound and paid techniques. Inbound alone can't always drive someone to buy, so smart marketers use outbound and paid techniques to introduce their companies, amplify their messages, and expose their leads to content.

Paid Programs Defined

We've already talked about using paid efforts in your social and email marketing, but paid programs can also include events, online ads, and content syndication.

Because paid communication is highly targeted, and usually includes explicit CTAs, they work particularly well for lead generation. In fact, many people think about lead generation as exclusively done through paid/outbound marketing.

Paid programs also tend to include content that's geared toward the mid-stage buyers. Middle-of-Funnel content can help push someone through your sales process at a faster rate because engagement can indicate buying intent.

Combining paid with inbound marketing can multiply the number of views you generate, dramatically increase sharing, and ultimately increase the number of potential customers who see your content.

Cost per Lead (CPL)

In paid programs, "cost per lead" or "investment per lead" refers to the amount of money spent to earn each lead. You can divide the program investment by the number of leads you acquired to come up with this metric.

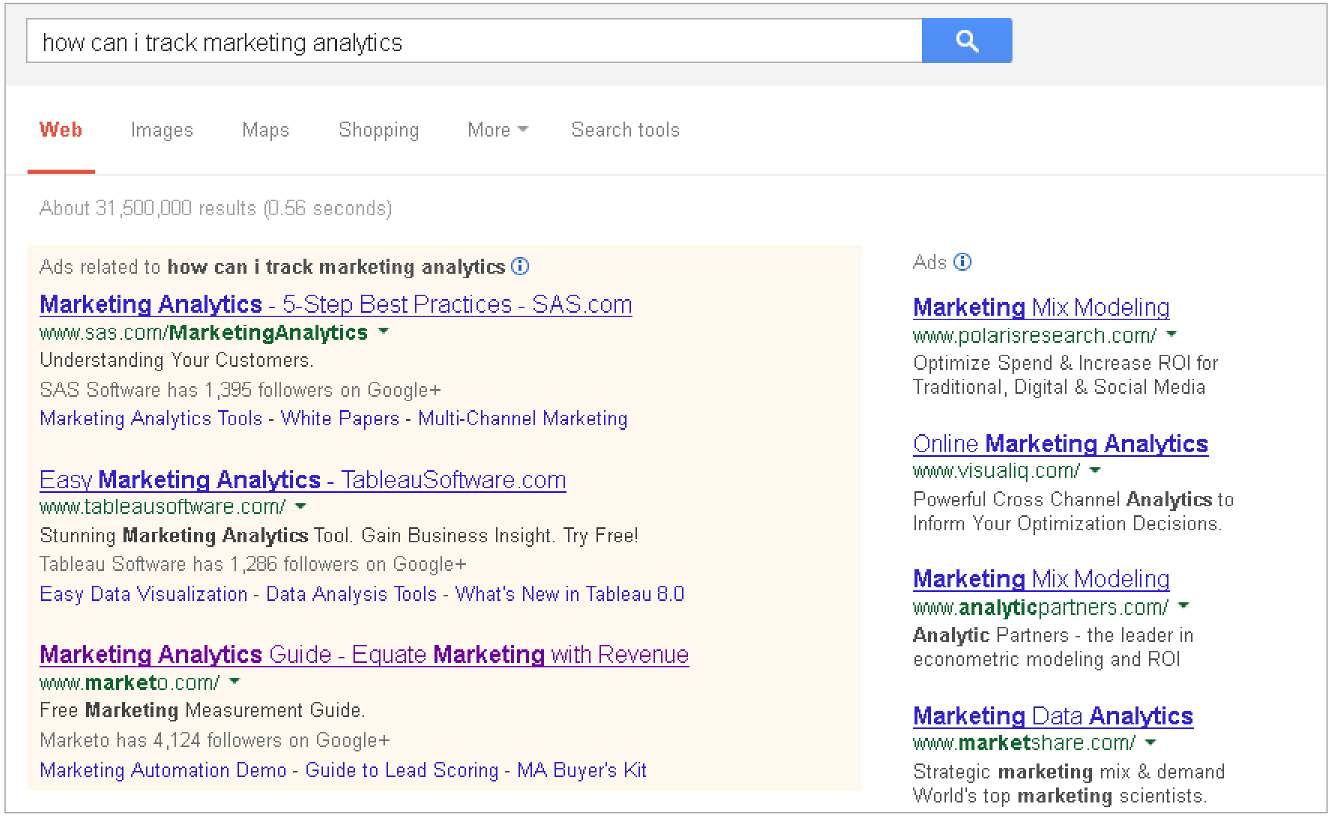
PAY-PER-CLICK (PPC) SEARCH ADS

With pay-per-click advertisements, your ad is placed as a "sponsored result" on the top of search engine results, and you pay for each received click. You can tailor your PPC ads to appear when specific search terms are entered, creating highly targeted ads.

PPC ads allow you to limit how much you'll spend, and unlike traditional advertising, you can adjust your copy or CTA within hours.

PPC Keywords

The keywords you choose for your PPC campaigns should be close to your top SEO keywords, but you'll probably have more. Some companies have hundreds of PPC keywords, depending on their business and goals. As with your SEO keywords, you can use Google's Keyword Planner to help you brainstorm and research keyword popularity.



PPC ads purchased by SAS, tableau, and Marketo for the search term "how can I track marketing analytics?"

PAY-PER-CLICK (PPC) SEARCH ADS

PPC Ad Copy

A great PPC ad has good copy and an engaging headline, but you only have 25 characters for your headline and 70 characters for your copy. So you have to say a lot in a very small amount of space!

According to Search Engine Watch, there are five golden rules of PPC ad writing:

1. **Use clear, easy to understand language**
2. **Use vivid and emotional language**
3. **Focus on keywords and the intent behind them**
4. **Have a compelling offer and CTA**
5. **Don't go overboard with abbreviations and truncated phrases**

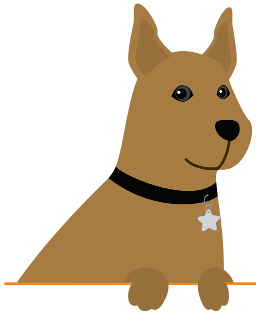
Relevancy and Targeting

To really resonate with the needs of your leads, your copy should directly address a customer pain point. You want your leads to immediately see value in clicking on your ad.

As an example, if you type the term "buying marketing automation" into Google, you'll see one of Marketo's PPC ads—one that addresses that exact request with an analysis of twelve automation vendors. The ad copy states that the report is free, adding additional value.

Ads related to **buying marketing automation**

Marketing Automation - Analysis of 12 **Automation** Vendors
www.**marketo**.com/
Free Gartner Report.
Marketo has 4,721 followers on Google+
Marketing Automation Demo - MA Buyer's Kit - Compare Automation Vendor



Negative Keyword Campaigns

Consider using negative PPC keywords, e.g. keywords that will cause your ad to *not* trigger. For example, if you sell high-end jewelry and are bidding on the word "watches", you might exclude any search that has the word "cheap". Remember your PPC campaigns are budgeted by cost-per-click, so every click makes a difference to your bottom line.

Excluding specific words or phrases that aren't relevant to your product or service can help you reach your ideal prospects.

PAY-PER-CLICK (PPC) SEARCH ADS

PPC Headlines

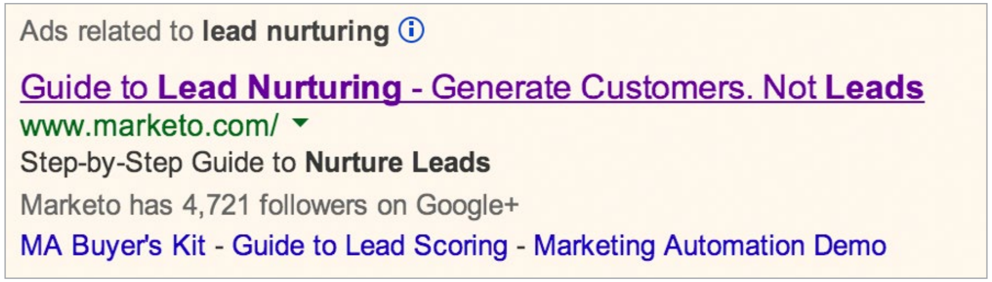
PPC headlines have to pop—and quickly. Don't be afraid to use strong language to create a sense of urgency. You also want your headline to convey authority. Your ad will likely be competing against other PPC ads, so make yours stand out by reviewing other ads that show up for your keywords.

Call-to-Action Strategy

PPC ads are a great place to showcase your content, keeping in mind that people who search for your keywords may be unfamiliar with your company. This means that it often doesn't make sense for your call-to-action to be a sales pitch. Instead, offer them a piece of content that is applicable to their search query.

Marketo runs this PPC ad, targeting the keyword phrase "lead nurturing" (see right):

We assume that a person searching for "lead nurturing" is doing research —they're probably not ready for an aggressive pitch. As you can see, we offer them an educational piece of content (*The Definitive Guide to Lead Nurturing*) instead.



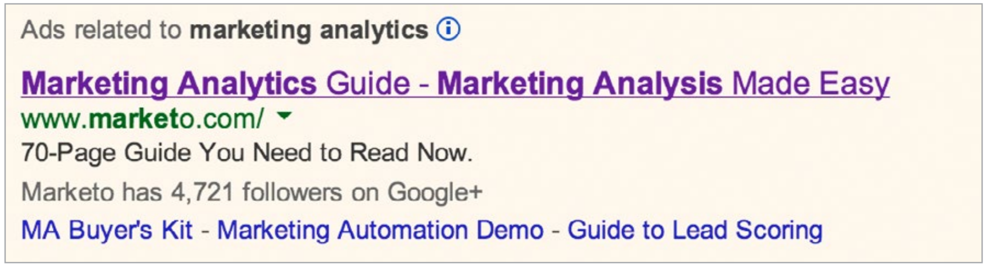
PPC ad from Marketo, targeting the keyword phrase "lead nurturing"

Ad Extensions

You can add additional information to your PPC ads with ad extensions, including:

- Your business location and display map
- Links to additional pages on your site (aside from your chief CTA)
- Product images and prices
- Phone number
- The number of your company's Google+ followers
- Seller ratings (if applicable)

Here is an example of a Marketo PPC ad with extensions—a Google+ follower number and three additional links.



Marketo PPC ad with additional extensions

PAY-PER-CLICK (PPC) SEARCH ADS

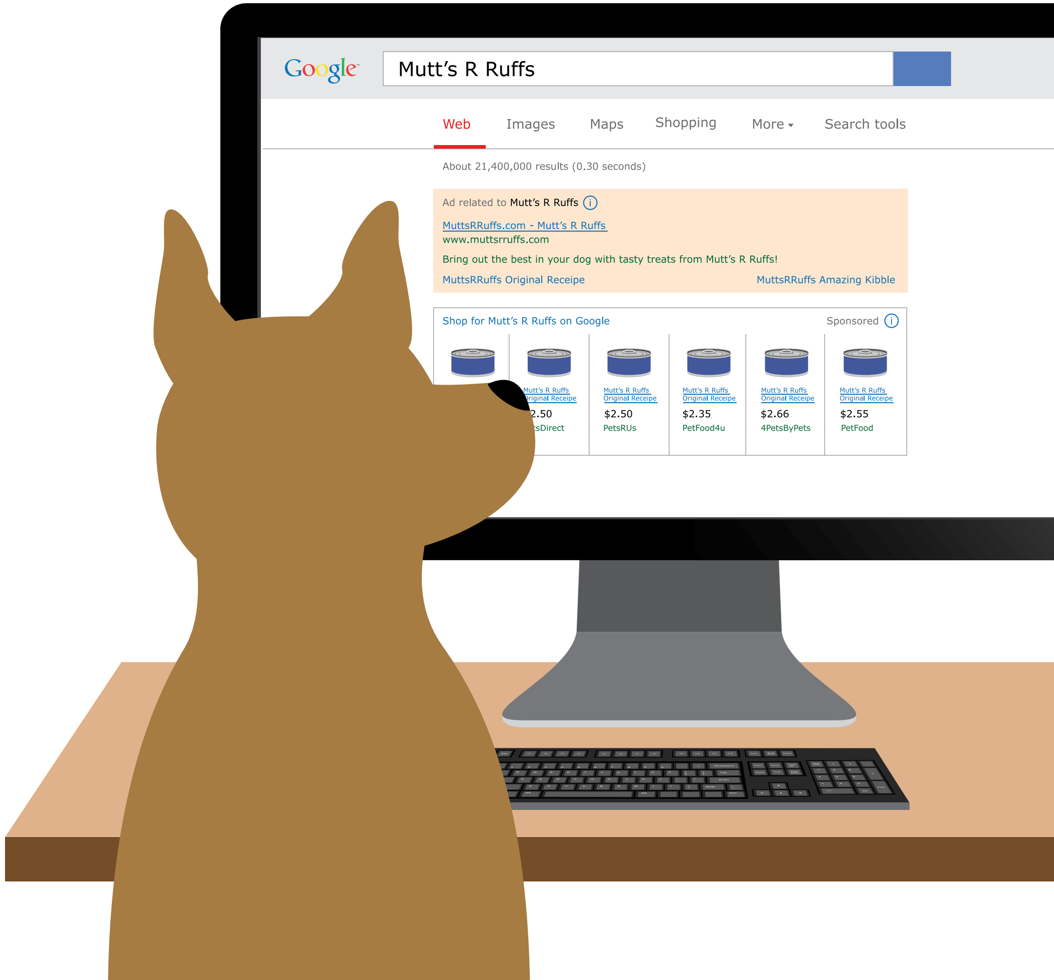
Google Quality Score

According to Google, your PPC ad's Google Quality Score is "an estimate of how relevant your ads, keywords, and landing pages are to a person seeing your ad". If you have a high Quality Score, Google thinks your ad and landing page is relevant to searchers—so you will rank higher for the same bid amount!

Google tabulates Quality Score based on the following criteria:

- **Your keyword's expected click-through rate (CTR):** This is calculated based on past CTRs and how the keyword has historically performed in your ad.
- **Your display URL's past CTR:** How often your display URL received clicks.
- **Your account history:** Your overall CTR on all ads and keywords.
- **Landing page quality:** The relevancy of your landing page and how easy it is to view and navigate.
- **Your keyword/ad relevance:** How relevant your ad is to your keyword.
- **Your keyword/search relevance:** How relevant your keyword is to what the customer searches for.
- **Geographic performance:** How successful you have been in the regions you are targeting.
- **Ad performance on a site:** How your ads are performing on Google and other partner sites.
- **Targeted devices:** How well your ads perform on mobile and tablet devices.

Your Quality Score affects your ad position, your eligibility for ad extensions and other formats, and your actual cost-per-click (CPC). In other words, a high Quality Score is a big deal.



PAY-PER-CLICK (PPC) SEARCH ADS

PPC Measurement

With PPC ads, you can quickly change your copy, CTA, landing page, or offer. To take advantage of this flexibility, pay close attention to how your ads are performing.

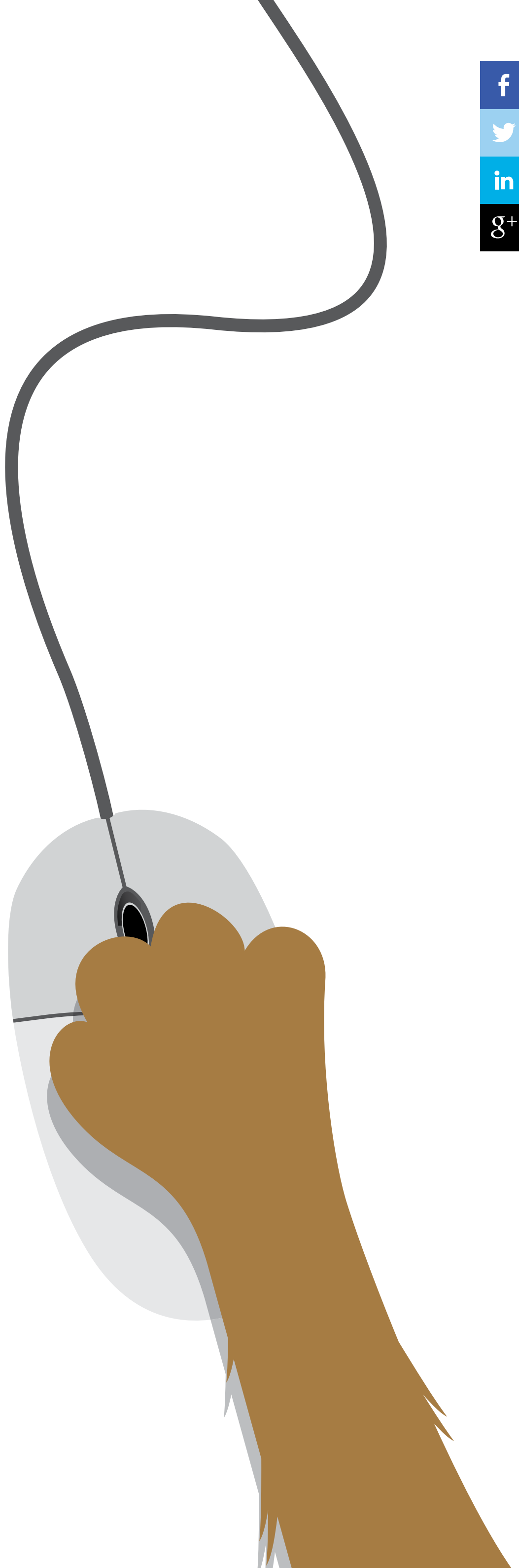
Measure the following metrics for your PPC campaigns:

- **Impressions:** An impression measures the number of times your ad is displayed when someone types in your search term.
- **Clicks:** This is the number of times a viewer actually clicks on your ad.
- **Conversions:** A conversion refers to the number of times a lead takes the action that you intended—downloading a piece of content or asking for a demo. You can keep track of conversions either in Google Analytics or your marketing automation solution.

  As an example, Marketo offers an integration with Google AdWords that enables joint customers to view conversion data from Marketo in AdWords, providing insight into which clicks resulted in qualified leads, opportunities, and new customers.
- **Spend:** The amount of money that you have spent on your campaign.

You can combine these measurements to come up with other important metrics:

- **Click-Through Rate (CTR):** Clicks/Impressions. The percentage of impressions that yield clicks.
- **Cost Per Click (CPC):** Spend/Clicks. This refers to the amount of money that you are spending per click, taking your entire campaign spend into account.
- **Conversion Rate:** Conversions/Clicks. This is probably the most important of all the paid search metrics. This is the percentage of your clicks that turn into actual conversions.



ASK THE EXPERTS:
PPC Q&A WITH MIKE NIERENGARTEN, CEO, OBILITY CONSULTANTS

MKTO: What makes PPC effective for lead generation?

MN: No other channel can provide the same level of targeting, segmentation, and performance measurement. PPC is distinctly measurable, but it's not limited. In your lead gen efforts, you can adjust performance on a microcosm level—tweak a bid by geography and hour, test ads and offers, or target a specific company.

MKTO: How do PPC strategies for B2B differ from those in B2C?

MN: Lead generation PPC requires qualification, nurturing, and most importantly education. In B2B, your PPC strategy is content-based and lead quality focused; you need to incorporate data from both marketing automation and CRM systems. You also want your PPC strategy to focus on campaigns that drive MQLs and high pipeline-to-cost ratios—not just cheap conversions or high impressions.

MKTO: How do you see PPC lead generation strategies evolving in the future?

MN: As marketers and consumers get more sophisticated, decision-makers are beginning to want higher quality, more compelling content. They're starting to get creeped out by aggressive retargeting and social advertising. Marketers need to take a step back and better understand the customer journey at an atomic level. If a prospect has downloaded this piece of content, watched this demo, and read this analyst report, what content/offer/phone call/direct mail piece is going to close the sale?

PPC managers are going to need to recognize that simply generating new leads is not enough. PPC needs to be an effective lead nurturing and sales enablement program. The future PPC strategy includes lead generation and lead nurturing. PPC managers really need to be able to grasp the full sales funnel.

CONTENT SYNDICATION

As we've covered, prospective buyers start their purchasing journey on many different channels, so it's important that you establish a multi-channel presence. One way to deliver high-value content to the right prospects is through content syndication—promoting your whitepapers, articles, news releases, and more on third-party sites and newsletters for greater reach and engagement.

Content Syndication Targeting

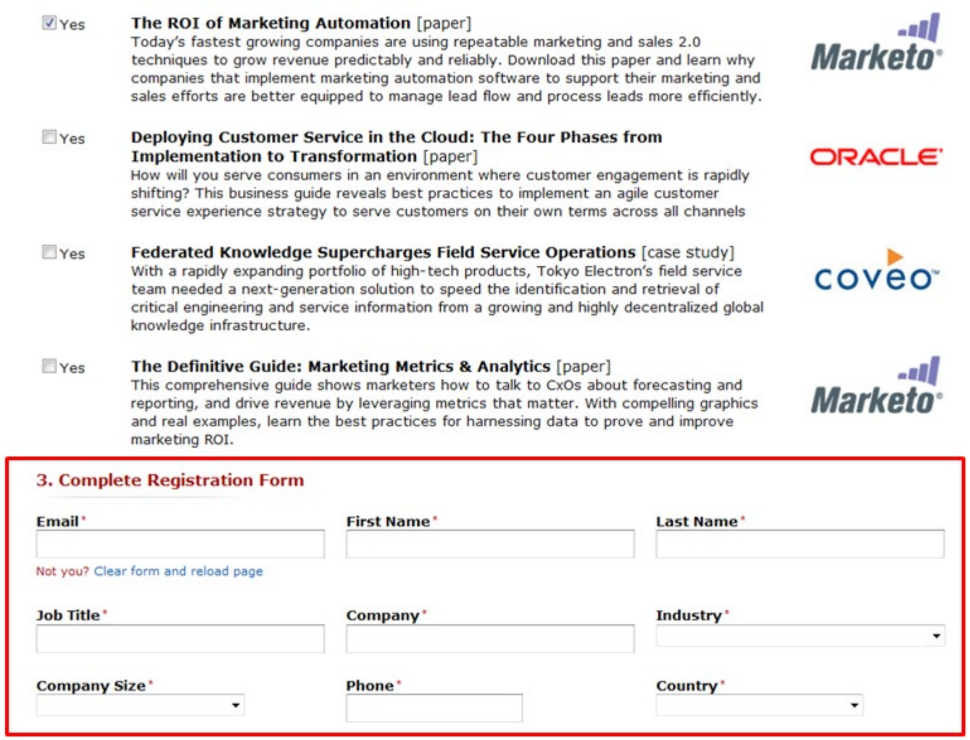
Content syndication works best with mid to late stage offers. It can help you move leads further down your funnel, and gauge those leads who are closer to making a purchase. Content syndication websites (like Zift Solutions, Outbrain, and NewsCred) gate your content, capturing a prospect's information so that you can market to them later.

> "Creating and curating high-value content so it can easily be found and shared is essential."
>
> – **Stephanie Bridges, Product Marketing Expert**

When working with content syndicators, you can generally target your leads based on numerous demographic features, such as:

- Geography (e.g., "all English-speaking countries")
- Job Type (e.g., "only Sr. Marketing Managers and Directors")
- Company Size (e.g., "100+ employees")
- Industry Type (e.g., "all industries" or "only IT")

Here is an example of a content syndication registration page. The registration form shows you which demographics you can target with your content.



☑ Yes **The ROI of Marketing Automation** [paper]
Today's fastest growing companies are using repeatable marketing and sales 2.0 techniques to grow revenue predictably and reliably. Download this paper and learn why companies that implement marketing automation software to support their marketing and sales efforts are better equipped to manage lead flow and process leads more efficiently.

☐ Yes **Deploying Customer Service in the Cloud: The Four Phases from Implementation to Transformation** [paper]
How will you serve consumers in an environment where customer engagement is rapidly shifting? This business guide reveals best practices to implement an agile customer service experience strategy to serve customers on their own terms across all channels

☐ Yes **Federated Knowledge Supercharges Field Service Operations** [case study]
With a rapidly expanding portfolio of high-tech products, Tokyo Electron's field service team needed a next-generation solution to speed the identification and retrieval of critical engineering and service information from a growing and highly decentralized global knowledge infrastructure.

☐ Yes **The Definitive Guide: Marketing Metrics & Analytics** [paper]
This comprehensive guide shows marketers how to talk to CxOs about forecasting and reporting, and drive revenue by leveraging metrics that matter. With compelling graphics and real examples, learn the best practices for harnessing data to prove and improve marketing ROI.

3. Complete Registration Form

Email* | First Name* | Last Name*

Not you? Clear form and reload page

Job Title* | Company* | Industry*

Company Size* | Phone* | Country*

Use registration forms to segment your audience.

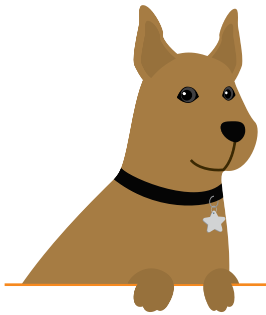
CONTENT SYNDICATION

System Integrations

Use an API to sync your content syndication program leads with your marketing automation solution—that way, you won't have to wait for an Excel file from the vendor.

Following up fast, and with a high-value offer, is critical to success with content syndication campaigns, since many of the leads won't know who your company is. If you don't follow up fast, they won't connect your email to the content they downloaded a week ago.

As with any email correspondence, feature a very clear CTA and an image at the top. If your content is synced with your marketing automation, you can quickly send a relevant follow-up.



Quick Content Syndication Tips

Heed these words of caution when choosing a content syndication vendor:

- **Be vigilant.** Some site owners mistake permission to republish content as permission to repurpose. Be cautious of who you share your content with, and only work with reputable, established companies. Find out which other websites your content will be placed on.
- **Get credit.** Confirm that your company is getting credit for its work. Ensure that your logo will be kept intact and your company will be named.
- **Keep prospects fresh.** Find out how often the vendor adds fresh prospects to its database so your content isn't circulating with the same audience. Occasional breaks from a syndicator between contract renewals can help your numbers.
- **Use mid-stage content.** By using mid-stage content in your paid content syndication programs, you are selecting leads that are further along in the buying cycle.

DIRECT MAIL

You may think direct mail is a thing of the past, but it's still effective for very targeted communications.

Maybe you've developed a content asset for high-level executives who don't usually browse the web and have cluttered email inboxes. That's where direct mail comes in because a physical piece of correspondence can stand out.

If your marketing automation software and CRM system has a direct mail application, you can track your direct mail from the moment the vendor creates the package to when it hits the prospect's desk.

Target Your Creative

In today's digital marketing world, direct mail campaigns need to be innovative. Don't send a postcard with a cut and dry marketing message—make your direct mail campaign targeted, and make it pop. Don't use the same messaging in a direct mail campaign to CEOs that you'd use for a marketing practitioner.

Here's a clean, sophisticated direct mail piece, inviting director-level executives to an exclusive event:

Direct mail piece from Telindus

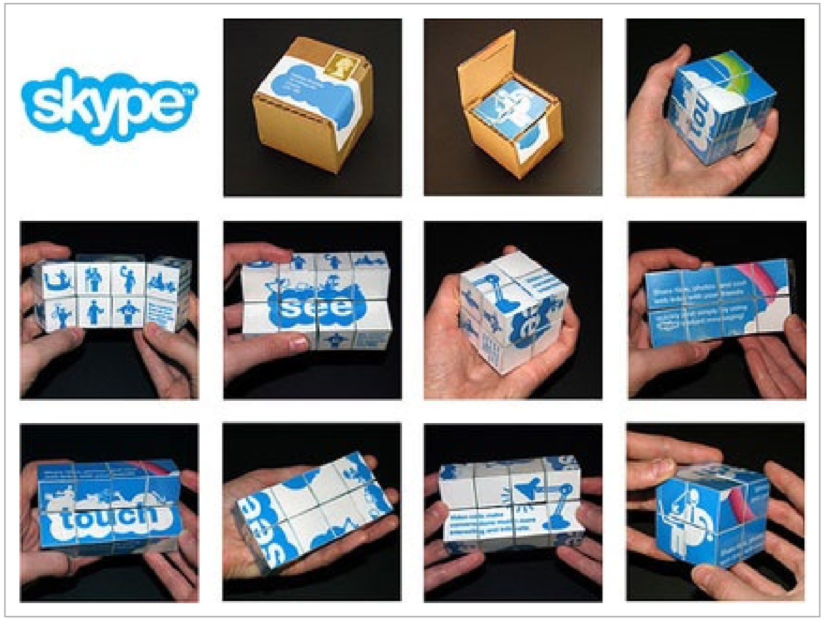
DIRECT MAIL

Avoid Looking Like Junk Mail

Overloaded text, or verbiage like "Free______", "No Gimmick", and "Pre-Approved" can send the wrong message to your audience. Keep an eye on the design, and make sure to test.

Instead of sending mail that looks like junk mail, make sure your design is clean, streamlined, and creative.

Here are two highly creative, artfully designed direct mail pieces:



Direct mail piece from Skype

Direct mail piece from Hell Pizza

DIRECT MAIL

Multi-Channel Direct Mail

The best way to use direct mail is to build a whole campaign around it, using email, social, blogs, and events.

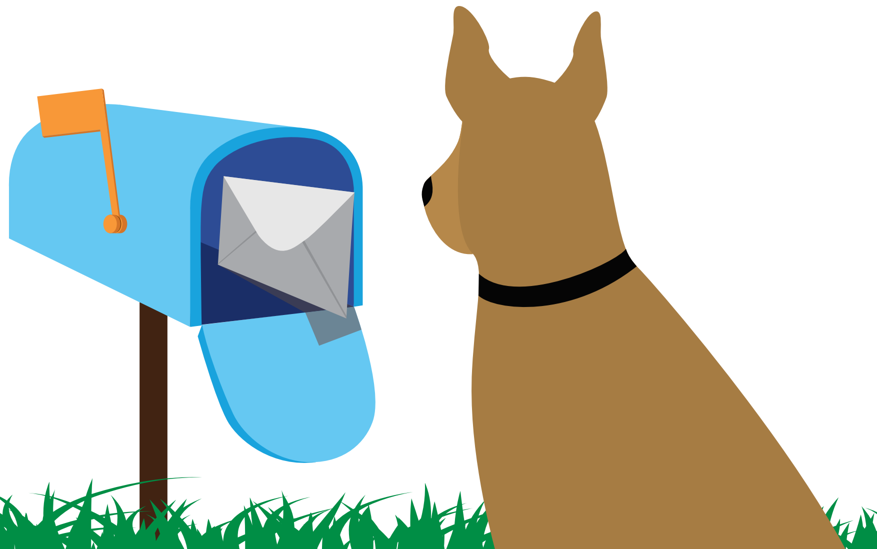
We recently drove $200,000 in revenue with a direct mail campaign. How? By being creative and multi-channeled in our efforts. Here's a quick case study:

The Marketo Fortune Cookie Campaign

To engage a targeted list of accounts, we used a mix of tactics including direct mail, email, social, and sales.

Here was the campaign flow:

1. Sales nominated a select group of target accounts for the campaign.
2. We sent personalized baskets to targeted executives at each account. These included fortune cookies, a printed version of a Definitive Guide—one of Marketo's large pieces of thought leadership content—and a personalized letter.
3. When the package was signed for, we received a notification through Marketo, and a follow-up email was automatically sent.
4. Once the email was sent, a follow-up call was scheduled with the sales rep through Marketo's integration with Salesforce.
5. We also created specialized, campaign-specific social and web posts to reaffirm our campaign messaging and imagery.



EVENTS

Whether you are hosting a small private function, a large-scale international tradeshow, or an executive-level webinar, event marketing can be an integral part of your lead generation mix.

Events offer you the chance to define your brand, clarify the solutions you provide, establish personal connections with participants, and give your prospects and customers the chance to interact with each other.

As every marketer knows, there's no better advertising than the direct words of a satisfied customer. Events also provide a venue to convey your company's thought leadership and personality through speeches, content assets, and presentation style.

EVENTS

Webinars

Called webinars, webcasts, or web conferences, these events can take the form of web-delivered presentations, discussions, or workshops. Typically lasting 30-60 minutes, webinars can be delivered in real-time, or in pre-recorded form.

With real-time webinars, you can allow attendees to participate by asking questions directly of the presenters. Recorded webinars can be hosted with other content on your website, adding a video element to your content mix. Webinars can help you generate new leads *and* nurture known leads.

Use Your Webinars to Educate

Many companies fail to produce quality webinars that map to early or mid-stage leads, focusing instead on webinars that are very product or service-centric. It's important to develop educational, thought leadership webinars that resonate with Top-of-Funnel (TOFU) leads. Once you draw them in, you can take a more promotional approach in your follow-ups.

As an example, we recently hosted a webinar called *Graduating From Email Marketing to Marketing Automation*. While marketing automation is our core competency, we didn't mention Marketo-specific information in the webinar at all. Instead, we educated our audience about the benefits of marketing automation in general. Don't try to make the sale before your audience is ready to buy.

Webinar Content Repurposing

Once the webinar is over, you can generate additional leads, engage registrants that didn't attend, and continue the conversation with repurposed webinar content—your slide decks and your webinar recording. Post your slide decks on SlideShare, post your recording on YouTube, and feature both on your website. Promote your recording on social channels and send it to all registrants directly after the event.

EVENTS

Virtual Events

These events have the look and feel of an offline event, but are hosted in a virtual environment, combining the educational elements and ease of a webinar with the networking and interactive features of a trade show. Participants visit a virtual booth, where they can collect materials, meet the staff, ask questions, and even pick up some virtual swag.

Your Virtual Booth

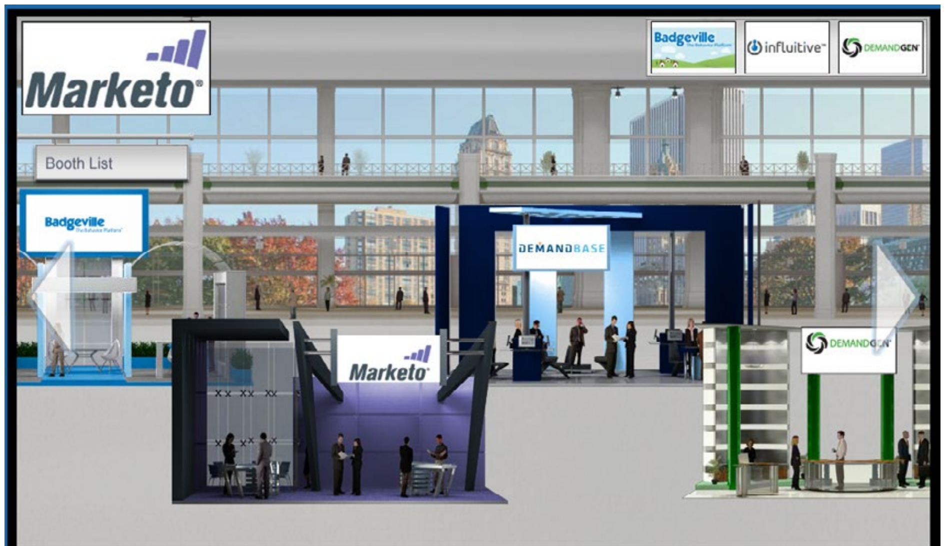
You wouldn't design a tradeshow booth that doesn't suit your company, and the same goes for your virtual booth—rather than using a default appearance and setting, adhere to your own style guide.

Many platforms allow you to chat both privately and publicly with your booth visitors. Keep your public chat box clear of clutter, and use it to moderate discussions, promote your content and/or session, and welcome visitors. If it's appropriate to answer a question privately, simply move the discussion off your public chat.

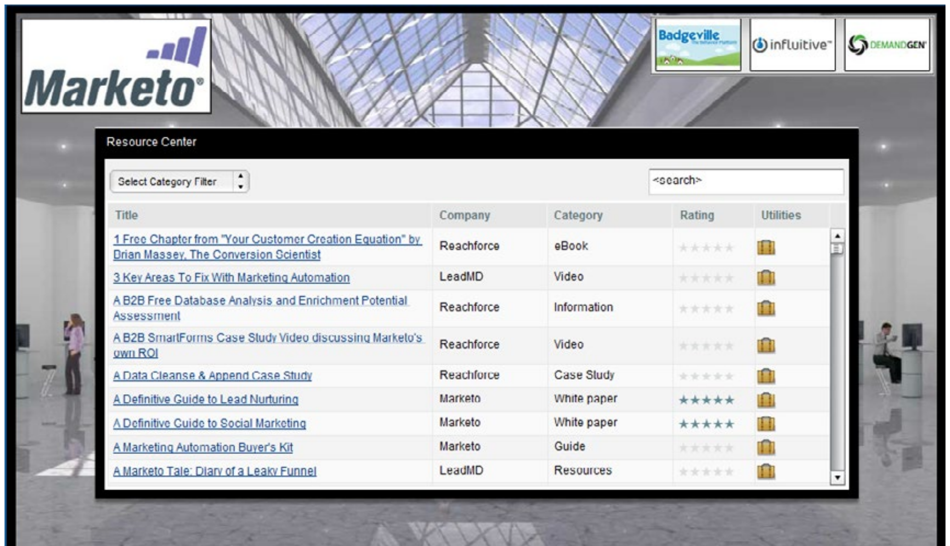
Booth Content

Most virtual events allow you to include content in your booth and elsewhere within the exhibit hall. It may be tempting to throw up some product or service-specific datasheets, but your best bet is to include thought leadership pieces. As with any lead generation technique, make sure you are addressing pain points, but not shoving your sales messaging down your audience members' throats. Marketo recently hosted a virtual event and all of the offered content was Top-of-Funnel thought leadership, rather than pure promotion.

The virtual booth at a Marketo virtual event



Top-of-Funnel content offerings at a Marketo virtual event



EVENTS

Physical Events

From pre-event promotion, to the booth and follow-up, physical events arguably involve more moving pieces than any other type of marketing program. That said, trade shows, conferences/summits, and roadshows offer you something invaluable—the chance to engage directly with your prospects and create relationships face-to-face.

Think of a trade show as a museum, and every booth as a different exhibit. Which exhibit would you rather check out—the one with a bland fact plaque and a pre-recorded explanation of the exhibit, or the one that lets you play?

Games and Interactive Booth Tools

During a physical event, it's not unusual for hundreds, if not thousands, of people to be packed into an expo hall. Every vendor is trying to lure people into their booth, so how do you stand out from the competition? At Dreamforce 2012, Marketo attracted crowds with a meme generator:

Marketo's meme generator at Dreamforce 2012

EVENTS

Contests and Sweepstakes
Trade shows are a huge investment for participants and attendees alike—especially supersized conferences like Salesforce's Dreamforce, Microsoft's Convergence, SAP's Sapphire, CES, and SXSW. Why not reward your prospects and customers for their investment? A sweepstakes builds brand buzz, but it can also build your database with qualified contact information before the show even starts. Use a sweepstakes during an event to drive booth traffic. For instance, for Dreamforce 2013, Marketo ran a sweepstakes to win a Smart Car.

We also hold a "Road to Dreamforce" contest each year, offering winners a Dreamforce Full Conference pass, VIP access to exclusive Dreamforce parties, and money for airfare, lodging, and extras. This contest lets us know who will be attending the event, and also gets us new leads.

Sweepstakes and contests can humanize your brand, but they can backfire if you don't take two aspects seriously: the terms and conditions, and the fulfillment process. ***Make sure the terms comply with legal standards and are completely transparent, and have a solid plan for fulfillment in mind.***

Unique Collateral
Many companies are moving away from printed collateral at their booths and sessions, but consider still providing one or two items that attendees can take home. A good rule of thumb is to provide one asset that explains what your company does (in an engaging way, of course) and one piece of thought leadership—this can be a fun, visual ebook or a printed infographic. Stay away from basic whitepapers—if it isn't visually appealing, it's likely to be thrown away.

Marketo's Smart Car sweepstakes

EVENT PROMOTION CHECKLIST

Pre-Event Promotion Checklist:

- ✓ If appropriate, kick off your event with a press release
- ✓ Schedule a series of emails (we've found the third email usually drives the most registrations!)
- ✓ Include a calendar invite (ICS file) in the email, so folks can add the event to their calendars
- ✓ Create your confirmation process:
  - ✓ Send a confirmation email immediately after registration
  - ✓ Send a reminder email two days prior to the event
  - ✓ Send a final reminder email one hour before the event
- ✓ Steadily promote on social channels
- ✓ Consider a call down with your inside sales reps to get more registrants, or run an automated campaign with a voicemail service like Boxpilot

Following up after the event is just as critical as your promotion. A one-third attendance rate is typical, so follow up with attendees *and* those who registered but didn't attend. For the highest possible click-to-open rates, follow up fast.

Post-Event Promotion Checklist:

- ✓ Send a thank you email immediately after the event
- ✓ Send slides, if applicable, within 45 minutes of the event
- ✓ Send recordings, if applicable, as soon as they're available—ideally by the next day
- ✓ Consider a phone call to those who meet your demographic criteria. Your follow-up call should happen within a few days of the event's conclusion

ASK THE EXPERTS:
Q&A WITH PATRICK CAVA, SR. MANAGER OF PRODUCT AND PARTNER MARKETING, CERTAIN

MKTO: What kinds of events are most effective for lead generation?

PC: This will differ for every company, depending on your target audience and their stage in the buying cycle. Roadshows and industry tradeshows are great at providing the initial touch for early stage buyers, especially for companies that want to build brand awareness. For larger organizations with a broad user base and diverse product line, user conferences can be great for developing leads at every stage of the buying process.

MKTO: How will event marketers generate leads in 2014? What about in 2024?

PC: In 2014, we'll see an increasingly personalized attendee experience at events, in which the content is curated to the needs of each participant and the engagements are targeted to achieve their specific goals.

Additionally, event marketers will leverage technologies that can more easily connect the right people, start to measure the qualitative value of those engagements, and tie those back to tangible revenue.

Given the pace of technology innovation, lead generation at events 20 years from now will be a much more seamless experience. Just as Marketo is able to easily aggregate all the "interesting moments" of a customer's interactions over various digital marketing channels, you'll see an increase in the ability to passively gain insight into the behavior and interests of attendees at in-person events, enabling organizers to focus less on simply gathering leads and more on deepening those connections through the quality of content and connections they're providing.

MKTO: What do you say to people who doubt that event marketing is effective for lead generation?

PC: In Content Marketing Institute's 2013 study, in-person events were rated more effective than any other content marketing tactic, and according to a 2013 CMO council report, 31% of respondents consider events essential to doing business. But in that same CMO report, only 34% of those respondents actually applied those metrics to assess ROI.

Fortunately, event marketers no longer need to rely on anecdotal evidence or less meaningful statistics such as number of attendees to measure event success.

By integrating event management software with marketing automation and CRM, you can assess real event return compared to other digital marketing programs, and assess indirect lead generation benefits, such as an increase in brand awareness or social sentiment.

CHAPTER TEN:
TELEPHONE-BASED LEAD GENERATION

INSIDE SALES TEAMS

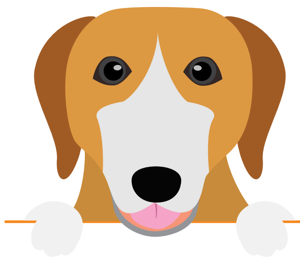
Telesales, or inside sales reps, can be a big contributor to successful lead generation. Your sales team qualifies your leads and adds a personal touch.

An important distinction here—telephone-based lead generation isn't the same as telemarketing. Telesales provides the human interaction needed to turn your marketing leads into opportunities and sales.

Lead Qualification with Inside Sales

Inside sales teams (at Marketo, we call them Sales Development Reps, or SDRs) have one focus: to pass the baton from marketing to sales. Our SDRs review, contact, and qualify marketing-generated leads and deliver them to Sales Account Executives (or AEs). This ensures that every single lead marketing passes to your sales team is as qualified as possible. Your inside sales reps should offer every lead value, making a positive impression, creating future demand, and becoming trusted advisors.

> "The most successful lead generation/lead management programs have dedicated phone resources whose sole job in life is to take raw inquiries and qualify them before they are sent directly to sales."
>
> – **Craig Rosenberg, The Funnelholic Blog**



Insidesales.com's 7 Rules to Increase Contact Ratios

1. **Call back as fast as you can!** A lead that is contacted within five minutes, compared to one contacted after 30 minutes, has a 100x higher contact rate.
2. **Be persistent.** If you call once, you'll earn 37% of a lead's potential value, two phone calls will earn you 61%, and six phone calls will get you 90%.
3. **Optimize calls.** Ask your lead when the best time to contact them is. You can do this by putting a field in a form.
4. **Time of day matters.** It has been said that the best time to call a lead is between 8am and 9am or between 4pm and 5pm. Make sure your reps are available at this time.
5. **Day of the week matters too.** Studies show that Tuesday and Thursday are the best calling days. Use sales tracking tools to determine what works best for your audience.
6. **You need a direct dial line.** You don't want to deal with gatekeepers. Consider including a form that asks for this information.
7. **Get the right technology.** Whether it's a marketing automation tool to help you manage your leads, or a caller ID tool like LocalPresence, technology helps.

INSIDE SALES TEAMS

Building Your Team

Compared to the cost of *not* calling a qualified prospect and missing out on a deal, the cost of calling a lead that isn't ready to become a sales lead is low. Set your lead scoring bar low enough that your inside sales team calls a relatively high number of people, and keep your inside sales team amply staffed.

Your inside sales teams should be college educated, and have some experience on the phone in a sales function. Additionally, your reps should be outgoing, motivated, and have excellent communication skills.

Expectations

The average number of leads each inside sales rep can handle depends on your follow-up process. Marketo's rigorous process involves multiple calls and emails over a three-week period. We base our expectations of each inside sales rep on the following assumptions:

- Each inside sales rep can complete 40 to 60 meaningful activities each day (50 on average)—meaningful can be defined as a good phone call or email exchange.
- Each month includes an average of 20 business days.
- Inside sales reps work their inbound queue about two-thirds of the time. (The other third comprises outbound prospecting, training, inviting prospects to events, etc.)

Marketo multiplies these numbers (50 x 20 x 2/3) to gauge how many meaningful activities each inside sales rep should complete every month. We divide that number—about 650—by 2.6 to account for how many times an inside sales rep will call each lead on average. These calculations form our expectation that each inside sales rep can work 250 quality leads per month. Of course, if your follow-up process is lighter, you may expect each rep to work 400 (or more) leads each month.

You can also look at the ratio of inside sales reps to quota-carrying sales representatives. At Marketo, the marketing and inside sales team generate 80% of the sales pipeline, so we bias towards a relatively low ratio: one inside sales rep for every two or three AEs. If your inside sales team generates fewer leads per AE, or if you follow a less exhaustive follow-up process for each lead, this ratio can be as high as 1:4 or 1:5.

PAID TELESERVICES

If you want to outsource your outbound prospecting or need additional manpower, paid teleservices are ideal for ramping up call volume. And, thanks to improved training and ROI tracking, today's options are a far cry from yesterday's telemarketing services.

Types of Teleservice Vendors

There are many ways that teleservice vendors can help augment your lead generation efforts. Here are the different types of vendors you might encounter in your research process.

Automated Voicemail Campaigns

Automated voicemail campaigns (through companies like Boxpilot) can add a personal touch to your call downs without tying up your inside sales teams. These services allow you to send pre-recorded voicemails from anyone at your company—even the CEO—to a targeted list. A service like this is cost-effective, fast, and can be particularly useful when announcing a new product launch or confirming event registrations.

Appointment Setting Services

Is your sales team wasting time with cold calls and appointment setting? Consider investing in appointment setting services from companies like By Appointment Only. Most of these services have live reps who make over 175 calls per day, and charge only by results.

Skilled Calling Agents

If you want a more personal touch, consider hiring services like Televerde or The Bridge Group to help augment your sales team. These companies offer dedicated teams of skilled calling agents who specialize in lead generation, lead nurturing, and inside sales. Skilled calling agents are particularly experienced in handling objections, and can be a great option for smaller companies.

Choosing Your Teleservice Vendor

Your sales team is the front line and often the first human interaction that a lead has with your company, so make sure you contract with the very best. According to The Direct Marketing Association, here are some key elements to keep in mind when choosing a teleservice vendor:

- **Experience**—Does your vendor have the right type of experience in your industry and space?
- **Culture**—Does your vendor often use temporary services, or do they have full-time staff? If they have a full-time staff, how is their turnover rate? Visit your chosen call center if possible.
- **Location**—Is the vendor located overseas? If so, ensure that best practices are applied and that you can reach them during your own business hours. Consider having a third party visit the location on your behalf.
- **Compliance**—Does the vendor comply with all relevant call center regulations?

PAID TELESERVICES

Managing Teleservice Vendors

When outsourcing your outbound calling efforts, you need to closely manage the process. A great experience with a teleservice vendor can produce stellar results, but if the relationship is managed poorly, you might find yourself with poor leads and a lack of ROI.

Results First

Make sure you have agreed upon metrics and a distinct set of expectations. Are you aiming to generate, qualify, or nurture leads with your vendor? Present your criteria at the outset, or your experience might not meet expectations.

Train About Company and Industry

Your leads need to believe your teleservice vendor is part of your company, which makes training a must. Seek out quality teleservices firms, who will have methods of learning about your value proposition and space, and firms who specialize in your industry. Do you have buyer personas built out? If so, use them to give your teleservices firm insight into your business and buyers.

Ask for a Dedicated Team

Your teleservices vendor should provide you with a dedicated team who can learn your business over time. Aim for a team of agents who have a sales background rather than a telemarketing background, particularly if your product or service has more of a relationship-based sale.

And throw out the script! Your vendor should be employing smart sales reps who can be agile during a conversation. Another smart move? Test the reps yourself. Do a variety of test calls to evaluate their expertise.

Operational Details

According to The Direct Marketing Association, you should agree to the following operational details with your selected vendor:

- What information is to be provided to leads?
- How will the management of data and contacts be processed?
- What are the calling hours during which you want your reps to work?
- How will you monitor and record their calls?
- Is there a quality control process in place?

Once you have these nailed down, create a Service Level Agreement with your vendor that outlines all of these elements.

CHAPTER ELEVEN:

MIDDLE-OF-FUNNEL LEAD GENERATION

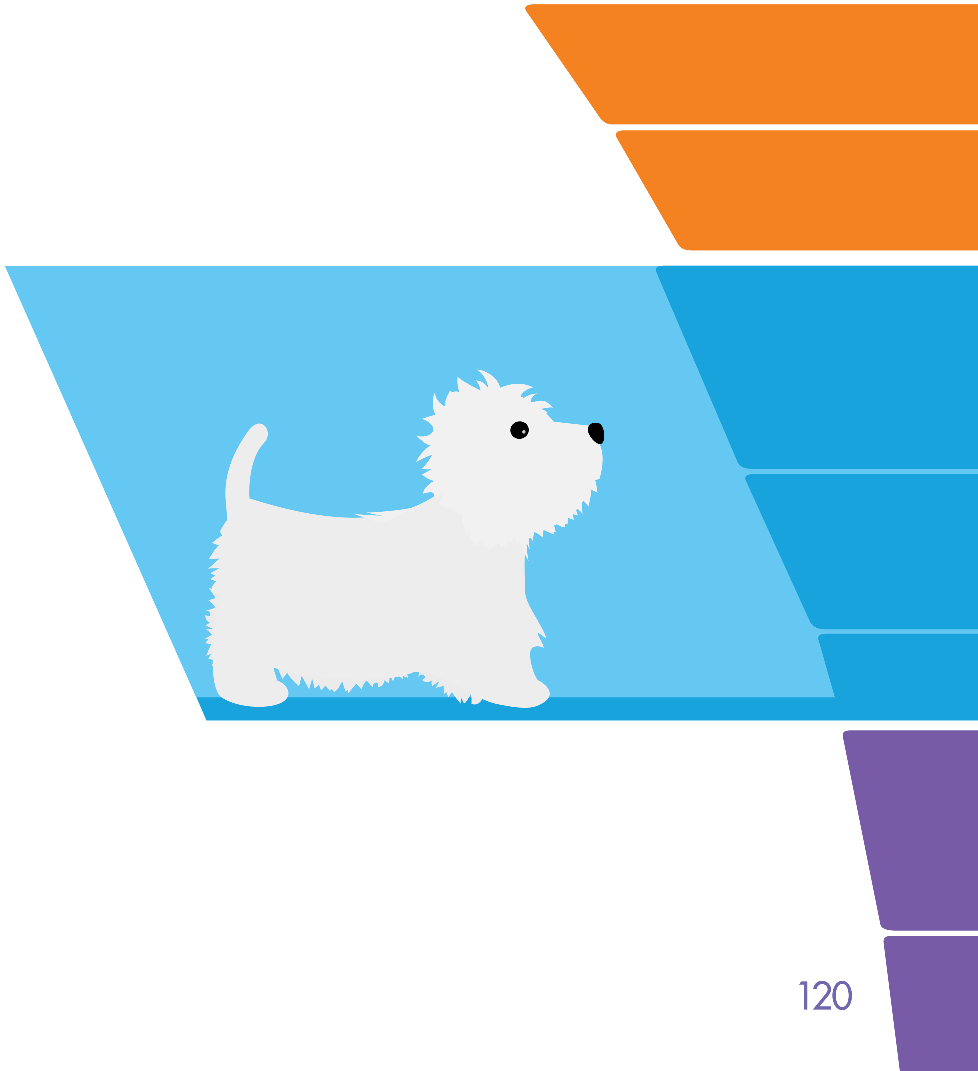
MIDDLE-OF-FUNNEL DEFINED

Once you've invested in your lead generation strategy, you want to get the most out of every lead. Many companies do a great job at generating Top-of-Funnel (TOFU) leads, but most new leads aren't yet ready to buy. That's where a solid Middle-of-Funnel, or MOFU, strategy comes in.

Remember the new buyer, in the age of self-education and information abundance? Like TOFU leads, most MOFU leads still aren't ready to engage with a sales rep, but they eventually will be. It's up to you to build your relationship, becoming a trusted source of relevant information.

Through lead nurturing and scoring techniques, you can make your lead generation efforts worth the investment.

Too many marketers think their job is done once a lead becomes a customer, but some of the same techniques described in this section can also be used for marketing to current customers (known as "customer lifecycle marketing") with cross-selling and upselling.



LEAD NURTURING

Lead nurturing is the process of building relationships with qualified prospects regardless of when they buy, with the goal of earning their business when they *are* ready. When done well, lead nurturing plays a critical role in your lasting relationship with both customers and prospects.

Why Lead Nurturing is Critical to Lead Generation

Without lead nurturing, leads who aren't ready to buy will simply fade away—and that's a lot of leads.

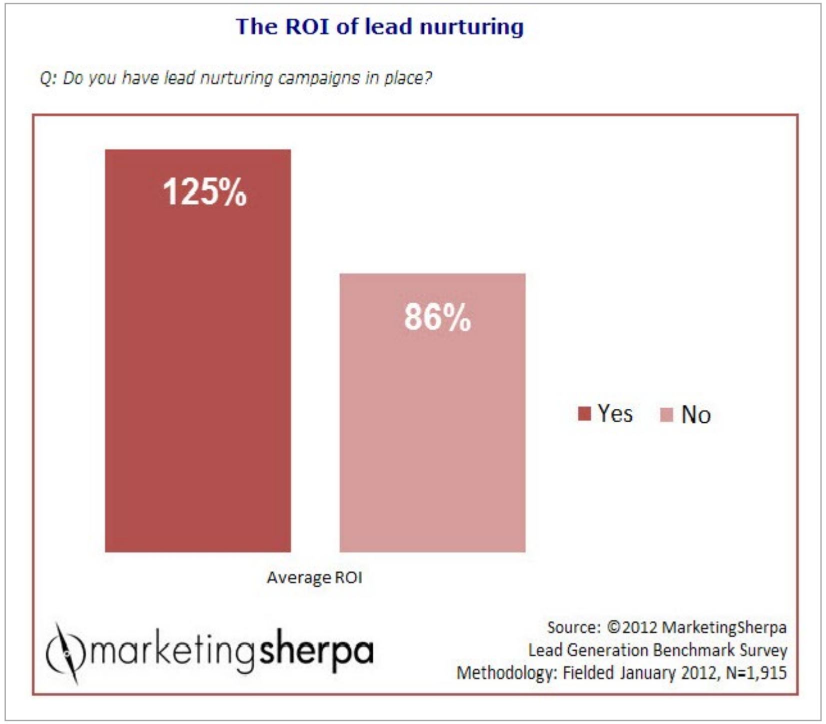
From Marketo's own database, we've learned the following about leads in the "target" stage of our sales funnel—*remember, targets are known leads who have engaged with our company, and fit our demographic/behavioral criteria:*

- 98% of our targets are not opportunity-ready
- Target to opportunity time is 123 days, on average
- 80% of our leads are slow leads—leads sent to our inside sales reps more than a month after entering our database

98% may seem like a high percentage, and it is. But if you have a strong Top-of-Funnel lead generation program, your database will gain a lot of early-stage leads. So what do we do? At Marketo, we nurture them.

Lead nurturing isn't about sending the occasional email (what we call "marketing at random"), and it isn't about promotional batch-and-blast campaigns either. Lead nurturing takes every lead's interests and buying stage into account, building awareness and affinity towards your brand while the lead is self-educating. Lead nurturing throughout the customer lifecycle also helps improve retention through upsell and cross-sell opportunities.

As this MarketingSherpa chart demonstrates, combining lead nurturing with your lead generation efforts can dramatically increase ROI.



MarketingSherpa Average ROI

LEAD NURTURING

The 6 Most Important Elements of a Lead Nurture Campaign

Jon Miller, VP of Marketing and Co-Founder at Marketo

1. **Be relevant.** If you're not being relevant, your leads will either opt-out, or they'll emotionally opt out when they stop paying attention.

2. **Don't be promotional.** Early stage buyers don't want product pitches or sales offers – they want to be educated or entertained. Promoting yourself in a lead nurture campaign is like going on a date and talking about yourself the whole time—you won't get that second date.

3. **Establish permission and expectations upfront.** A big part of email marketing is to set and consistently meet expectations—nurturing is no different. At the opt-in or soon after, let them know what to expect.

4. **Optimize for mobile.** 48% of emails are currently opened on mobile, and that number is growing. Many (if not the majority) of your emails will be seen on a mobile device.

5. **Don't make conversions your goal.** Your goal with nurturing is to keep in touch and develop a relationship over time. Keep your nurture emails casual—after all, your lead is probably reading it on a mobile device, in line at Starbucks.

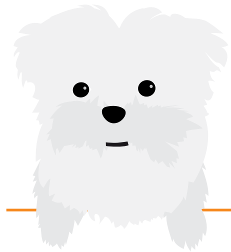
6. **Forget traditional metrics.** You can't measure the effectiveness of nurturing based on open and click rates, especially if there isn't anything to click. The only real way to measure nurturing is to pull out a control group who you aren't nurturing, and to measure the differences between those populations over time.

LEAD NURTURING

Engagement Marketing and Lead Nurturing

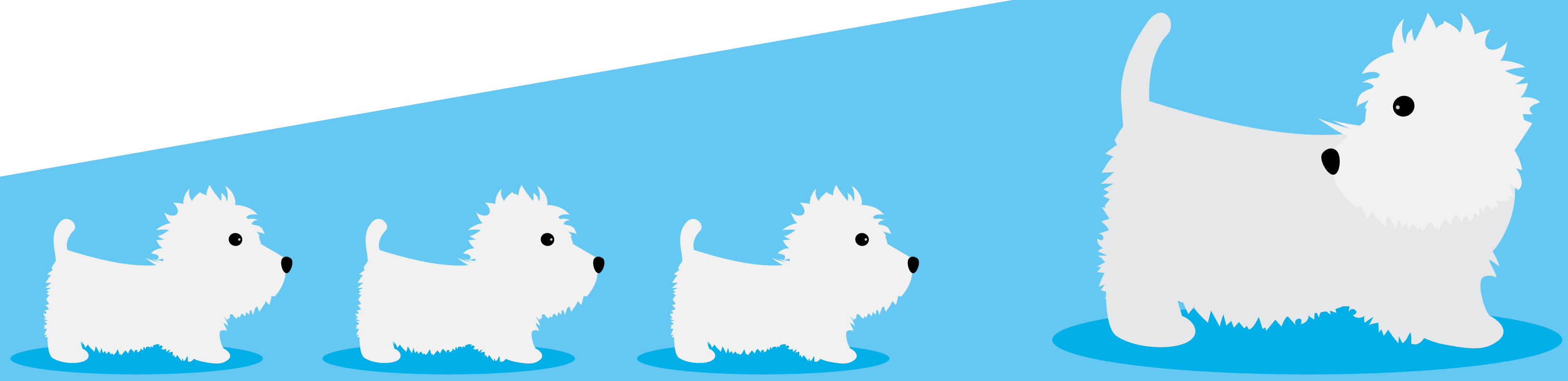
We already know that batch-and-blast email campaigns lead to noisy, ineffective, and irrelevant messages that weaken your chances to connect with potential buyers. Engagement marketing, on the other hand, nurtures leads through relevant, multi-channel conversations at every stage of the sales funnel. By creating a conversation with your buyers throughout the nurture journey instead of blasting them with irrelevant messages, you can strengthen your relationship with the buyer over time.

> "Most marketers treat lead nurturing as an extended form of automated batch-and-blast—heavy on product pitches and offers, light on educational content. Without taking the time to develop personas, buying cycles, and mapping leads to their place in the buying process, marketers will fail at lead nurturing."
> **– Jeff Pedowitz, President and CEO, The Pedowitz Group**



The 4 Elements of Effective Engagement Marketing

1. Relevance
2. Two-way communication
3. Multi-channel interactions
4. Continuous conversation



LEAD NURTURING

Basic Lead Nurturing

If you're new to lead nurturing, setting up your initial campaigns can be daunting. We often see companies bite off more than they can chew with overly-complex nurture campaigns, but we recommend that you start simple. Think big, start small, and move quickly with one of these basic lead nurturing techniques.

Incoming Lead Processing Campaigns

Incoming lead processing campaigns are a great way to make a positive first impression, which will improve a lead's perception of you forever. Before you introduce yourself, make sure you understand your lead's personal preferences and stage in the funnel.

Stay in Touch Campaigns

These campaigns are useful for all prospects who aren't ready to engage with sales. This type of campaign sends out relevant content to prospects over time, helping to educate them and building trust in your company. By touching prospects regularly, "stay in touch" campaigns keep your brand top-of-mind, so that prospects will contact you when they're ready for the next stage.

A stay in touch campaign may look like the following:

- **Day 1:** Introductory email
- **Day 10:** Email offering new content related to first download and subsequent web activity
- **Day 15:** Personal email from sales rep
- **Day 30:** Email offering best practices ebook or video
- **Day 45:** Call from sales rep to "check in"
- **Day 75:** Personal email from sales rep offering a demo

Accelerator Campaigns

Accelerator campaigns attempt to move prospects through the sales funnel faster with relevant "nudges", usually triggered by specific buyer behaviors or sales updates. By observing the type of content a prospect requests, visits to your website, and interactions with your brand on social, marketers can adapt their nurturing approach accordingly. Use accelerator campaigns for prospects displaying strong interest.

Lead Lifecycle Campaigns

Lead lifecycle campaigns maximize marketing's investment in lead generation by ensuring leads will never grow stagnant or lost, even if sales does not engage. As a general lead nurturing rule, leads should never just "sit" during the buying process. There are three important stages of lead lifecycle campaigns: lead handoff, lead recycling, and new customers.

> "One of the biggest mistakes we see marketers make with lead nurturing is overthinking and overdesigning their lead nurture programs at the gate. They become intimidated by the hugeness of the project, or they put together a behemoth nurture plan that takes too long to actually get started. Instead, start with one track for all of your personas—not seven. If you're currently doing random acts of marketing, even one track will be a huge improvement."
>
> **– Jon Miller, VP of Marketing and Co-Founder, Marketo**

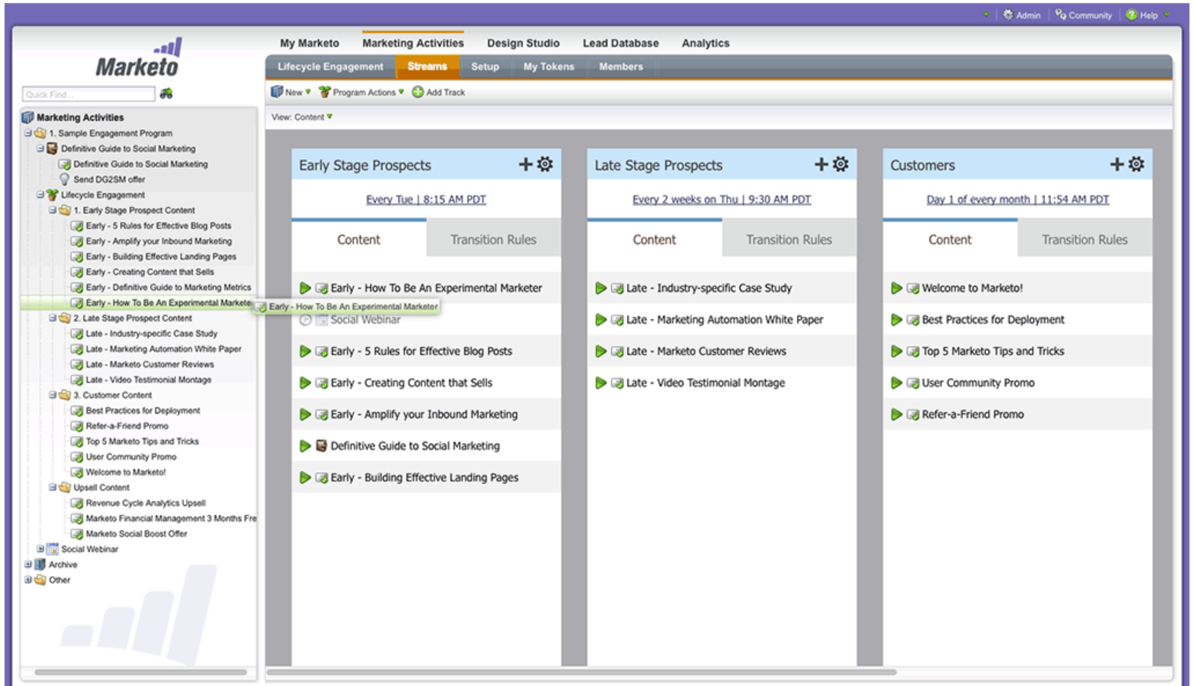
LEAD NURTURING

Buying Stage Campaigns
Set up nurture campaigns that map relevant materials to your lead buying stages. Create mid-stage and late-stage tracks and include content that engages throughout the buying journey. Early-stage leads should be nurtured with your "stay in touch" campaign. Your buying stage campaigns can also be mapped directly to personas, to ensure you're targeting the right people with the right content.

Interest-Based Campaigns
If a lead downloads an ebook on social marketing from your site, why not keep them interested by sending them similar material? In an interest-based track, you offer content that is related to a particular interest or theme. At Marketo, we've had big success with interest-based campaigns—compared to standard nurture tracks, we've seen a 57% lift in opens and a 59% lift in click-to-opens.

	Standard Nurture	Triggered Interests	Lift
Open %	21.7%	34.0%	57%
Click to Open%	23.4%	37.1%	59%

Open and click-to-open rates in standard nurture programs, vs. interest-based nurturing



Buying stage lead nurture campaigns in Marketo

LEAD NURTURING

Lead Nurturing with Marketo's Customer Engagement Engine

Because buyers today are multi-channeled in their buying behavior, you should be multi-channeled in your lead nurturing efforts. Tools like Marketo's Customer Engagement engine help you to deliver dialogues that are far more relevant and engaging than basic lead nurturing campaigns.

As you begin to think about multi-channel lead nurturing and engagement marketing, consider the following tips:

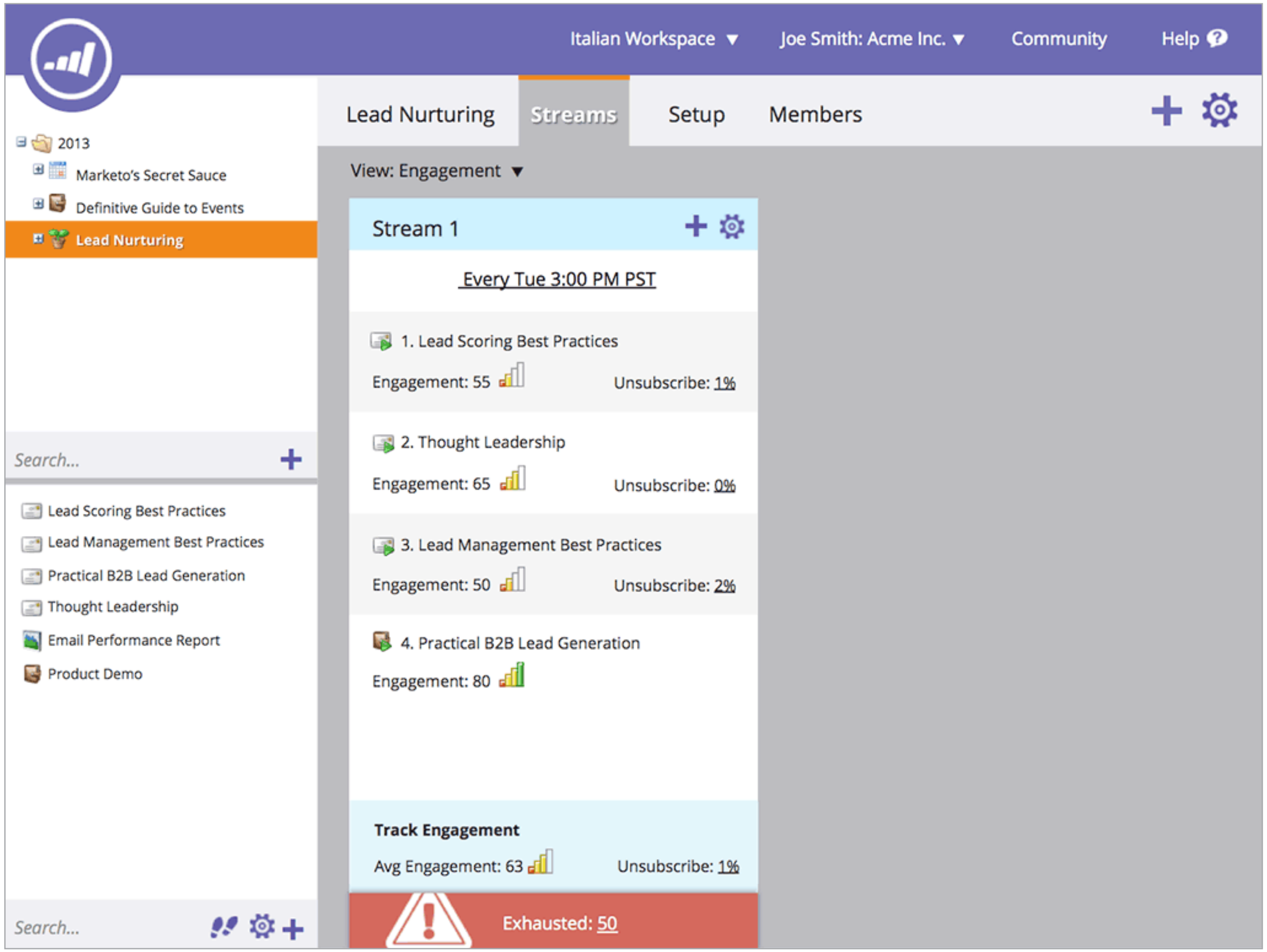
- **Listen and respond.** Observe and react to individual behaviors in real time.
- **Communicate both online and offline.** Amplify your message with conversations on social channels and at offline events.
- **Don't blast your audience.** This becomes particularly important if you are running multiple email campaigns. Advanced nurturing systems like Marketo's Customer Engagement engine prevent you from sending too many emails to one lead.
- **Know which content to send and when.** Send content that resonates based on a lead's actions, and never send duplicate content.
- **Build relationships over the entire customer lifecycle.** Send relevant content to buyers at every stage of the sales funnel.
- **Measure true engagement.** Track customer engagement with your entire program, as well as with each component over time. Marketo's Engagement Score can help you determine how engaged each lead is with your content.
- **Opt for an easy-to-implement solution.** Don't rely on IT to get your program off of the ground—look for a lead nurturing solution that lets you create engagement programs on your own.
- **Simplify your content management.** Never send the same content twice, and automatically de-activate content when it is outdated.

LEAD NURTURING

Follow the 4-1-1 Rule

At Marketo, we use the 4-1-1 rule: for every four educational or entertaining messages that we send, we also send one Middle-of-Funnel offer (like tips to help you make a business case for our product) and one later-stage, slightly more promotional offer (such as a demo). This helps us balance our messaging and keeps us from coming on too strong.

> "You don't want to be sales-y or pushy with prospects. At the same time, you want to nudge things along, or else you'll end up in the 'friend zone'. Just like with flirting, you might occasionally touch their arm—you want to let them know you're interested. That's where the 4-1-1 rule comes in."
>
> **– Jon Miller, VP of Marketing and Co-Founder, Marketo**



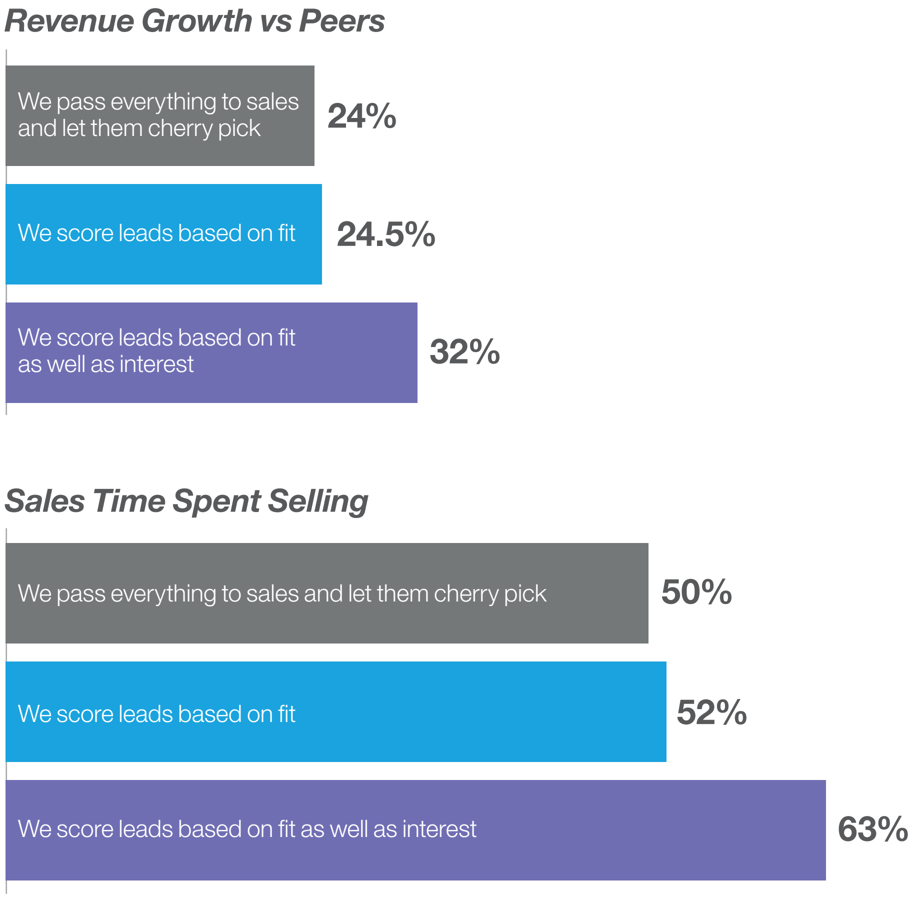
Marketo's Customer Engagement engine

LEAD SCORING

Lead scoring—a method of ranking leads for their sales-readiness, agreed upon by sales and marketing—is essential to your lead generation. By scoring leads based on the interest they show in your business, their current place in the buying cycle, and their demographic fit, you get a better idea of where each lead is in his or her buying cycle.

Lead scoring tells companies whether prospects need to be fast-tracked to sales or lead nurtured further. The best lead scoring systems use demographics and firmographics, as well as behavioral scoring (such as clicks, keywords, web visits, and social interactions). Companies who use lead scoring see a huge lift in ROI, and their sales teams spend less time selling.

Hard ROI of Lead Scoring



From Marketo Benchmark: lead scoring based on fit and interest grows revenue and reduces sales time

Lead Fit

Determining lead fit, or explicit lead scoring, is based on observable or directly shared information, often collected via an online form or registration process. Demographics and firmographics tell you how well a prospect fits your ideal buyer profile. In **Part Three: Defining a Lead**, we discussed BANT qualification (budget, authority, need, and timeline), demographics, and firmographics, all of which should be used to score your leads.

Also consider scoring for negative demographic fit—you might choose to negatively score someone with a generic email address, invalid phone number, non-existent company, or who says they are a student. Focus on leads that could become deals.

LEAD SCORING

Lead Interest

Scoring lead interest, often called implicit lead scoring, is done by tracking your prospect's behaviors (e.g. online body language) to measure his or her level of interest in your product or solution. For instance, a lead that downloads a simple whitepaper has shown engagement with your brand, while downloading a pricing sheet shows true buyer intent. Implicit lead scoring can also mean inferring additional information about a prospect based on the quality of the data you have (like the location of his or her IP address).

Latent Behaviors (Engagement)

- **Early stage content +3**
- **Attend webinar: +5**
- **Visit any webpage / blog: +1**
- **Visit careers pages: -10**
- **Decay inactivity: -1, -5, -10**

Behavioral lead scoring based on email and online activity

Active Behaviors (Buying Intent)

- **Pricing pages: +10**
- **Watch demos:**
  - +5 overview
  - +10 detailed
- **Mid-stage content +8**
- **Late-stage content +12**
- **Searches for branded keyword "Marketo" +8**

Lead Recycling

Sometimes a lead is not quite ready to buy, even after being contacted by sales. If, after contacting a lead, a rep determines that the lead is not sales-ready, the lead should be sent back to marketing—we call this "recycling" the lead.

When leads get recycled, they are either returned to your basic nurturing campaign or, even better, added to a specialized nurture track. These campaigns have been optimized according to specific information the rep collected during the sales interaction—such as the reasons why the prospect didn't move forward, or that lead's BANT score.

LEAD SCORING CHECKLIST

Which attributes or behaviors will you consider as you score your leads? Check off the boxes you think should be included in your model.

Explicit Scores to Consider:

Individual-specific demographic scoring rules

- ☐ Title
- ☐ Role
- ☐ Purchasing authority
- ☐ Number of direct reports
- ☐ Level of manager (to whom do they report?)
- ☐ Years of experience
- ☐ Specialties
- ☐ Type of email used (Gmail, corporate, Yahoo)
- ☐ Years at current position
- ☐ Designations/certifications
- ☐ Honors and awards received
- ☐ Social network participation
- ☐ Social network connections
- ☐ Social network influence
- ☐ Public recommendations
- ☐ Affiliations—groups and associations
- ☐ Career interests
- ☐ Personal interests
- ☐ Degrees received

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Individual-specific demographic scoring rules

- ☐ Rankings/stock indexes: Fortune 500/Inc 500, etc.
- ☐ Number of employees
- ☐ Company revenue
- ☐ Revenue growth (growing, declining, etc.)
- ☐ Company financial viability
- ☐ Number of divisions
- ☐ Number of products sold (SKUs)
- ☐ Location
  - ☐ City
  - ☐ State
  - ☐ Zip
  - ☐ Country
  - ☐ Phone area code
  - ☐ Headquarters or satellite
  - ☐ Location of branches
  - ☐ Size of branches
- ☐ Website traffic
- ☐ Website plug-ins
- ☐ Year founded
- ☐ Organizational structure (proprietorship, partnership, corporation)
- ☐ Geographic markets served
- ☐ Partners
- ☐ Fiscal year end
- ☐ Industry

Relationship scoring rules

- ☐ Account type (potential vs. actual)
  - ☐ Customer
  - ☐ Prospect
  - ☐ Partner
  - ☐ Investor
  - ☐ Competitor
- ☐ Previous relationship
  - ☐ Ex-customer
  - ☐ Lost opportunity
- ☐ Product(s) purchased
- ☐ Complementary technologies used (CRM, ESP, ERP, CMS, MRM, MA)
- ☐ Recycled count
- ☐ Lead source
  - ☐ Website
  - ☐ Sponsorship
  - ☐ PPC
  - ☐ Content syndication
  - ☐ Online ad
- ☐ Budget defined (monthly, quarterly, annually)
- ☐ Timeframe (project completion deadline)

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LEAD SCORING CHECKLIST

Behavior-Based Scores to Consider:

- [ ] **Livestreamed events**
  - [ ] Registered for
  - [ ] Viewed
  - [ ] Commented during
  - [ ] Asked questions during
  - [ ] Reviewed follow-up recording
  - [ ] Rated event
- [ ] **Surveys**
  - [ ] Visited
  - [ ] Completed
  - [ ] Viewed results
  - [ ] Participated in multiple surveys
- [ ] **Tradeshow**
  - [ ] Attended
  - [ ] Visited booth
  - [ ] Watched demo
  - [ ] Attended multiple tradeshows
- [ ] **Roadshow/Seminar**
  - [ ] Registered
  - [ ] Attended
  - [ ] Attended multiple events
- [ ] **Web pages**
  - [ ] Viewed landing page
  - [ ] Filled out form on landing page
  - [ ] Used instant chat functionality
  - [ ] Used "request a call back" functionality
  - [ ] Viewed–any
  - [ ] Viewed–product specific
  - [ ] Viewed–pricing
  - [ ] Viewed–customers or reviews
  - [ ] Viewed–multiple web pages
  - [ ] Viewed–multiple web pages in 1 week
  - [ ] Shared via social sharing
  - [ ] Browser used
- [ ] **Search Activity**
  - [ ] Searched for company name
  - [ ] Searched for product name
  - [ ] Searched other (scored on term)
  - [ ] Search engine used
- [ ] **Online courses**
  - [ ] Viewed information on
  - [ ] Registered for
  - [ ] Completed
  - [ ] Registered for multiple
  - [ ] Completed multiple
- [ ] **Community**
  - [ ] Submitted an idea
  - [ ] Submitted multiple ideas
  - [ ] Read about best practices
  - [ ] Read about ideas
  - [ ] Visited knowledge base
  - [ ] Read about product information
  - [ ] Asked a question
  - [ ] Asked multiple questions
  - [ ] Answered a question
  - [ ] Answered multiple questions
  - [ ] Shared a best practice
  - [ ] Shared multiple best practices
- [ ] **Podcasts**
  - [ ] Listened
  - [ ] Listened multiple times
  - [ ] Downloaded
  - [ ] Subscribed
- [ ] **Videocasts**
  - [ ] Viewed
  - [ ] Viewed multiple times
  - [ ] Downloaded

Additional Behaviors

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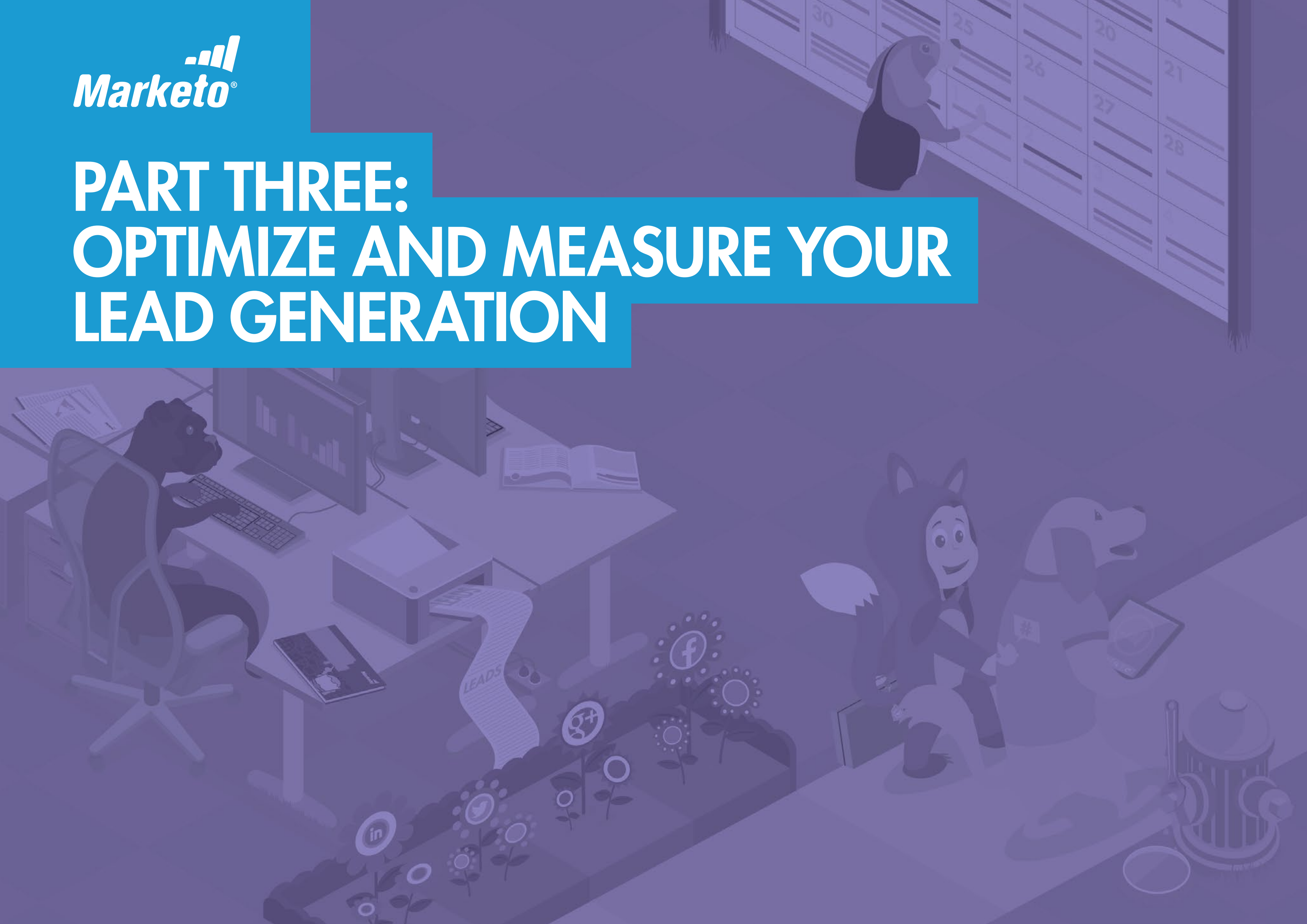
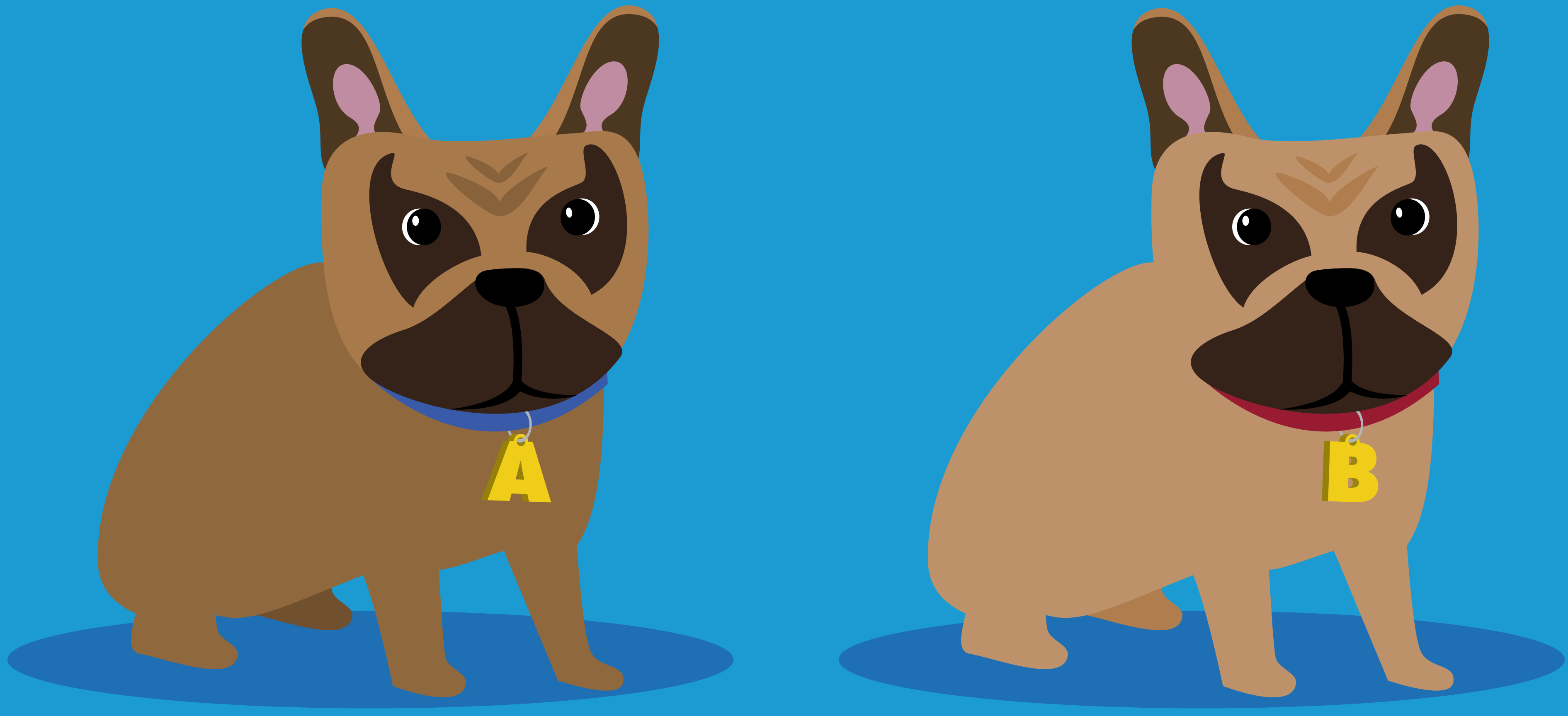
PART THREE: OPTIMIZE AND MEASURE YOUR LEAD GENERATION



CHAPTER TWELVE:

TESTING AND OPTIMIZATION



WHAT TO TEST IN YOUR LEAD GENERATION CAMPAIGNS

When it comes to lead generation, the more you test, the more you know. You can't optimize your lead generation unless you test it first. But many marketers don't know where to start with testing—you need a clear plan of attack.

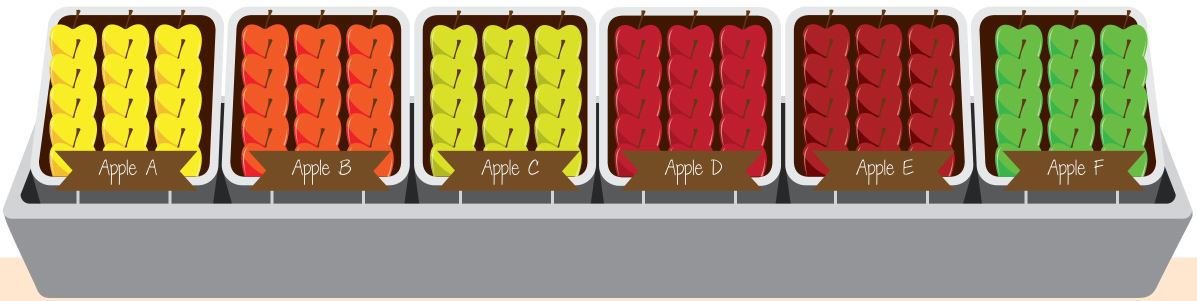
Program Testing

First, use control groups. Apply the program or treatment that you want to measure to only one subset of your target buyer group, and leave the rest of the group as-is. All other factors being equal, you'll be able to attribute any difference in buyer behavior to the program.

You can test almost anything:

- **Programs and tactics.** Did a particular webinar have an impact on conversions?
- **Messages.** Which message and/or copy resonated the most with our target audience?
- **Contact frequency.** How often should we send an email?
- **Spending levels.** What happens if we double investment in display advertising?

It's also possible to measure combinations of "touches" (actions taken by your company to engage leads) rather than individual touches. This is a great way to test lead nurturing tracks—it allows you to test and measure the effectiveness of an entire lead nurturing track, rather than the effectiveness of individual emails or offers. Should you want to test multiple campaigns at one time, you can use multivariate testing methods.



TESTING TYPES

The two most common types of tests are A/B and multivariate; you can run either (or both) on your lead generation programs. Services like Visual Website Optimizer (VWO) and Optimizely can help you take your testing to the next level. But first, you'll need to know *how* you want to test.

A/B Testing

A/B testing, or split testing, compares the conversion rates of two assets (such as landing pages, emails, or website pages) by splitting the traffic or email send between both, and then comparing results. You can also perform A/B/C tests and A/B/C/D tests.

A/B testing your lead generation assets and campaigns is inherently simple, as you're only testing a single variable at a time. This makes it easier to form actionable conclusions. A/B testing is also the ideal choice for smaller companies with less traffic or smaller databases—smaller amounts of traffic or leads can't handle a more complex test.

Multivariate Testing

Multivariate testing compares a much larger number of variables, and produces more complex information. With multivariate testing, you can compare a combination of multiple designs, CTAs, imagery, and copy choices. To run a conclusive multivariate test, you need to show statistically significant numbers of leads your different combinations. Because high traffic or large databases are needed to run a multivariate test to its full potential, they are best for large companies.

How long should you run an A/B test?

According to Neil Patel at KISSmetrics, you should run A/B tests for at least a week: "Even if you hit statistically significant conversion rates, these will vary a lot during the first few days of a test. Also, your variations should produce at least 100 conversions before you consider running them off."

Unsure of how many tests you should run? Find out how many versions you should run, or the number of days you should run each version, with our Landing Page Split Calculator.

THE 5 STEP TESTING PROCESS

According to Optimizely, a website optimization platform and leader in online testing, these are the five steps every company should take before launching a test.

Step 1: Define Success

Determine what you want to achieve through testing. What are your ultimate success metrics? What will you improve through testing and optimization? For lead generation, consider the successes that turn into clicks, conversions, and leads—think of these as macro-conversions. Next, consider micro-conversions—smaller steps you want leads to take, such as clicking a button, watching a video, or sharing a blog post.

Step 2: Identify Bottlenecks

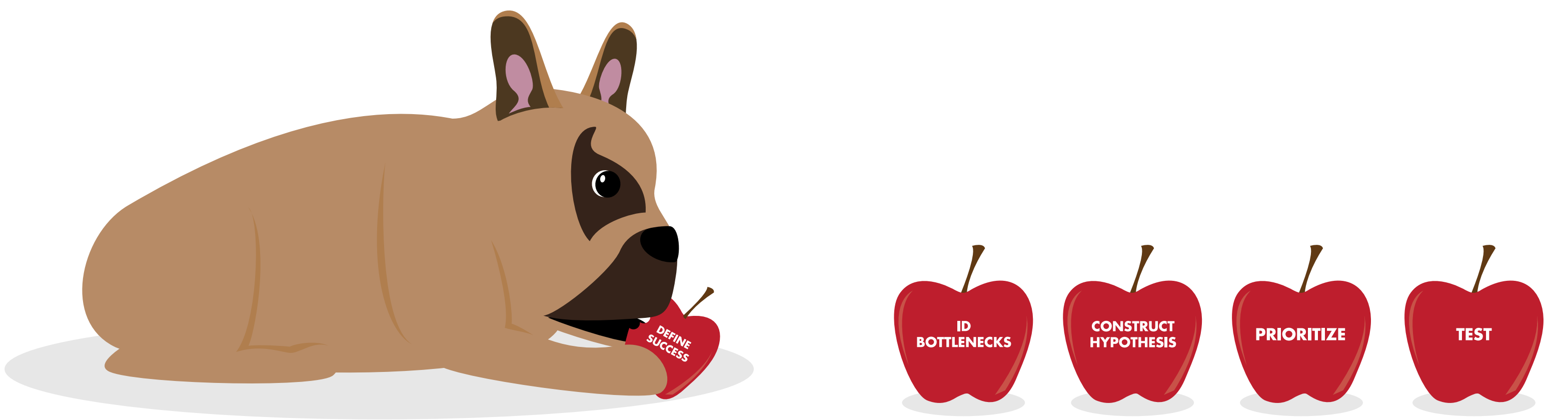
Identify what isn't working. Maybe you're getting a lot of traffic to a key website page, but people aren't actually converting or downloading your gated ebook. Ultimately, it's the bottleneck that you will want to test.

Step 3: Construct a Hypothesis

Determine a possible solution. If no one's filling out your form, maybe you need to shorten the number of fields, move the form to a different part of the page, or change the download button color. Your first hypothesis might be that your forms will work better with three fields instead of five. This is only your starting place—experiment, continually validating or invalidating your hypotheses to form new ones.

Step 4: Prioritize

Prioritize your hypotheses based on predicted impact. For instance, you might predict that moving your form will have more impact than shortening your form, so test the new form location first. Depending on your resources, you can always run multiple tests.



THE 5 STEP TESTING PROCESS

Step 5: Test

Time to test! Read on for a series of best practices for running accurate, conclusive tests.

Isolate Variables, Identify Your Control

Your control is the unchanged version of your email or landing page—the version you've already been using. For an A/B test, choose one variable of the control to isolate and change; for a multivariate test, isolate multiple variables.

Marketo recently ran a simple email marketing A/B test, in which we changed a single aspect of our "From" address. In this test, we used our usual "From" address ("Marketo Premium Content") as our control, and tried a personal "From" address with half of our emails in a particular campaign:

With approximately 1000 more opens and 500 more clicks, the personal address was much more successful. Our confidence level was 99%, meaning that our results were 99% reliable, rather than due to chance. For a test like this, a confidence level above 95% is commonly considered "statistically significant". And because we isolated only one factor, we were able to easily identify the reason for the higher number of clicks. Marketo now uses personal names in our email sends whenever we can.

Use a Large Enough Sample Size

The larger the sample size, the stronger your results will be. That being said, you obviously want to use the winning version as soon as you can. If you start too big, you'll expose half of a huge group to a less effective email, landing page, or website page. The best practice is to start out on the smaller side, keeping in mind that you can always repeat the test if your company needs extra convincing. Or you can leave the landing page test running a little longer to build the sample size.

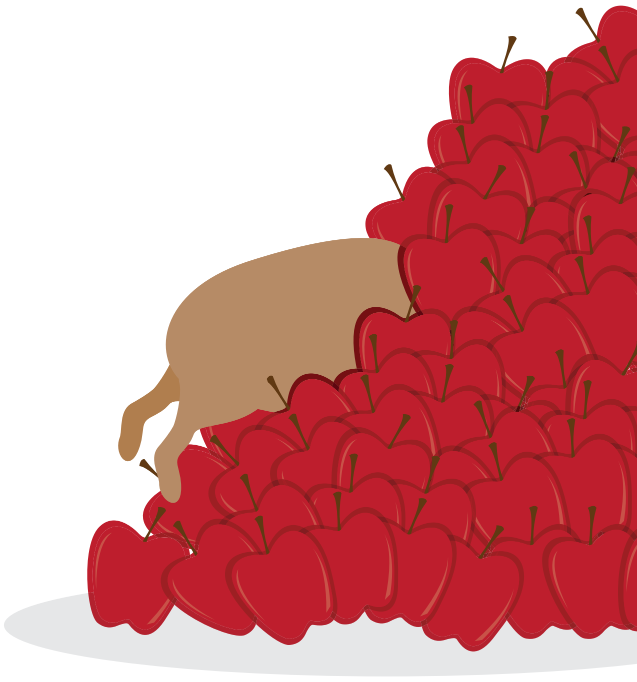
Control:

From:	**Marketo Premium Content** <ryanh@marketo.com>
To:	Miles Gotcher
Cc:	
Subject:	TEST | [New Gartner Report] The 2013 Leaders in CRM Lead Management

Test:

From:	**Ryan Hammer** <ryanh@marketo.com>
To:	Miles Gotcher
Cc:	
Subject:	TEST | [New Gartner Report] The 2013 Leaders in CRM Lead Management

Marketo's email marketing A/B control and test



Marketo®

THE 5 STEP TESTING PROCESS

Eliminate Confounding Variables

Be sure to control for any extraneous factors that could be affecting the results. To reduce these factors, you don't just need to leave your control unchanged—in an A/B email test, for example, you'd also need to send your test emails at the same time, have your two versions of your landing page running simultaneously, and make sure that the test is randomized. If you're using Marketo, you could send the two versions of your email to a random sample of 50% of your designated email list. You could also equally split the traffic to your landing page URL between the two different versions of your landing page.

Draw Appropriate Conclusions

Once you have your results, determine whether a statistically significant difference exists between your two versions. Instead of performing the significance tests yourself, you can simply search online for "A/B testing significance calculator", or "email testing significance calculator". It's never a bad idea to use two different online calculators to double-check your results.

30 THINGS TO A/B TEST FOR LEAD GENERATION

Dan Siroker
Co-Founder and CEO, Optimizely

Pete Koomen
Co-Founder and President, Optimizely

Calls-to-Action

1. Buy now? Purchase? Check out? Add to cart? Change your CTA text on your buttons to see which word or phrase converts the most visitors.
2. Vary the location of your CTA button—make some more prominent than others.
3. Test different colors, shapes, and sizes for CTA buttons on your website.

Content

4. Test gated content against non-gated content. Find out which gets more downloads and whether users are willing to fill out forms.
5. Test how your content is displayed. Do users prefer to scroll down the page, or click through to another page to learn more?

Copy

6. Test different headline texts. Try headlines that are more straightforward, goofy, or creative.
7. Test paragraphs vs. bulleted lists.
8. Test shorter vs. longer copy on your website, emails, and landing pages.

Visual Media

9. Test different types of imagery on your landing page—people vs. products vs. illustrations are a good place to start.
10. See how stock images stack up against images of your employees or customers in action.
11. Test auto-play against click-to-play.

Site Navigation

12. Test the order of your menu items in your site navigation.
13. Test the display of your navigation bar. Do visitors prefer a horizontal or vertical orientation?

Forms

14. Test the length of sign-up forms.
15. Try a special offer, discount, or promotion to increase signups.
16. Try asking for different information in your form fields.

Mobile Site

17. Try different displays and navigation options. Blinds, buttons, and blocks are a good place to start.

Ads

18. Test the headlines on your paid campaigns to see what gets more clicks.
19. Try changing the display URL on your ad.
20. Try different landing page variations—copy, image, CTA, and form.

Social

21. Change the size and placement of your social icons to see what compels users to share more often.
22. Test different images in social ads. See which ones get the best results.

Email

23. Test length and copy of your email subject lines.
24. Test personalized vs. un-personalized emails by using the recipient's name in the subject or email text.
25. Find the optimal time to reach your audience by measuring open rates on different days of the week and at different times.

Personalization

26. Test different page designs and messaging for new vs. returning visitors.
27. Test auto-filling form fields related to a visitor's site location.
28. Create seasonal or location-based offers and test them on visitors living in specific locations.

Pricing and Shipping

29. Test a free trial offer vs. a free demo offer for short-term and long-term conversions.
30. Test annual billing vs. monthly billing on your pricing page. Which generates more subscriptions?

CHAPTER THIRTEEN: METRICS

METRICS PLANNING

In the age of the self-educated buyer, marketing is in a unique position to reinvent itself as a core part of a company's revenue engine. As the function that "owns" the relationship with self-educating prospects, marketing is now responsible for a much greater portion of the revenue cycle than ever before.

If you can confidently identify how your lead generation campaigns truly deliver financial returns, you'll lift your marketing team's influence and credibility even further. And if you understand how your campaigns perform, you can also make the right strategic investments to improve results over time.

Before you can prove your lead generation ROI, you have to establish your metrics. Planning and developing concrete metrics to track your lead generation campaign and investment is no easy task—but it's an essential one. In the next few pages, we'll discuss best practices for establishing your expectations and criteria.

"The #1 mistake I see demand gen marketers make is not measuring program performance regularly. It's critical to have your immediate metrics to examine program performance (such as investment/new name or investment/MQL) but you also need to look at business metrics like opportunities and pipeline."

– Heidi Bullock, Senior Director of Marketing, Marketo

METRICS PLANNING

Establish Goals and ROI Estimates Up Front

When planning any lead generation campaign or marketing investment, your first step is to quantify your expected outcomes. All too often, marketers plan programs and commit their budgets without establishing a concrete set of expectations about a program's impact.

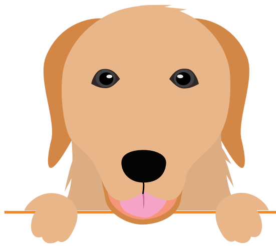
The solution is to form up-front goals, benchmarks, and Key Performance Indicators (KPIs) for each lead generation campaign. Modeling your ROI goals will help you to:

- Identify the key profit drivers that most affect the model and ultimately your profits
- Create "what if" scenarios to see how changing parameters may vary the results and impact profitability
- Establish the targets you will use to compare actual results

As part of planning any program, you need to answer these three questions:

- **What will you measure?**
- **When will you measure?**
- **How will you measure?**

In almost every case, you will need to take specific steps to make your programs measureable. This often includes setting up test and control groups, or varying your spending levels across markets to measure relative impact. You'll also need to track the appropriate attributes of your marketing programs—target audience, message, channel, offer, investment level, or other relevant attributes.



Set the Right Goals

It's important to set goals, but they have to be the right ones. According to Brian Carroll at MECLABS, marketers should ask themselves the following about every goal or KPI they set:

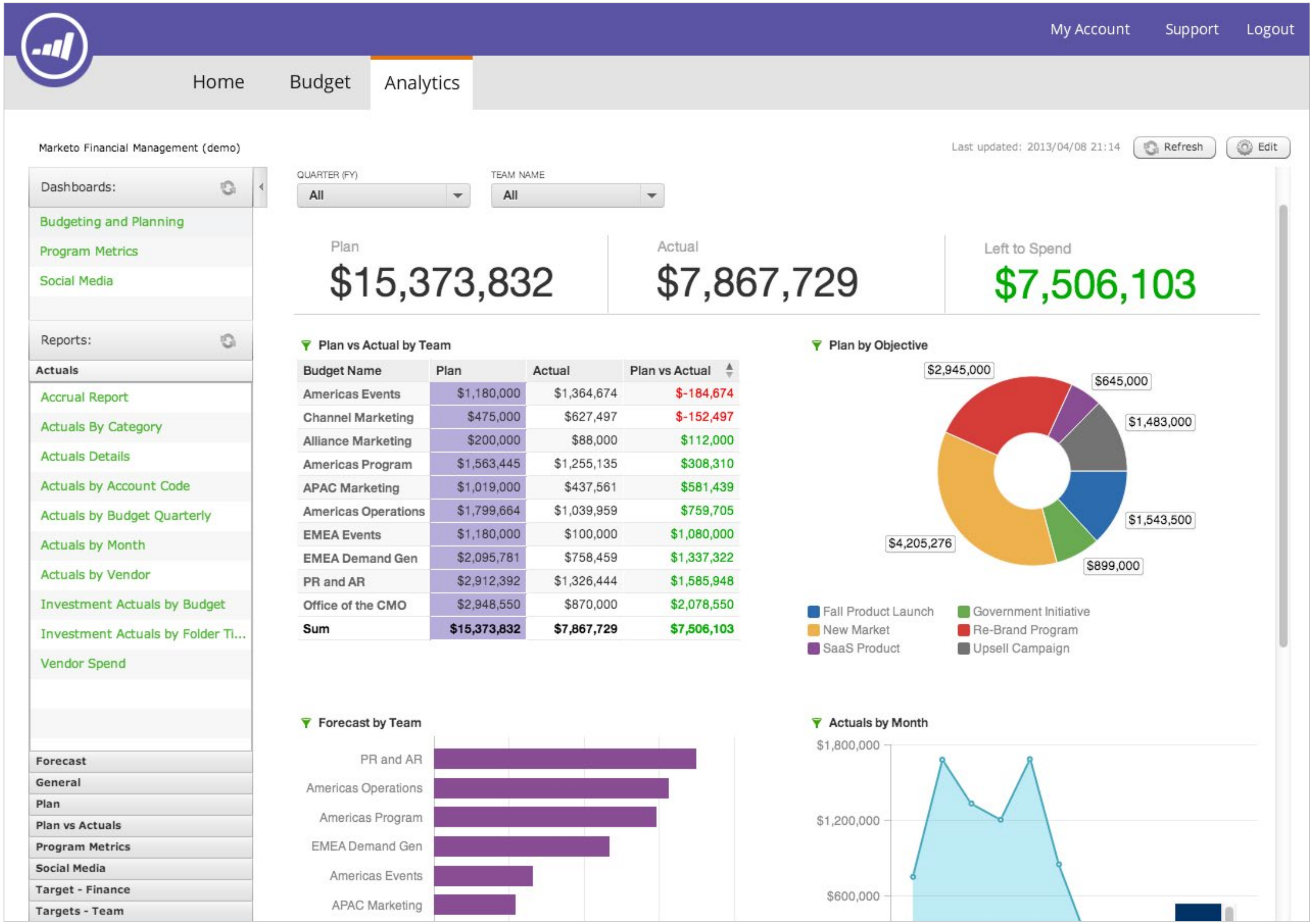
- How does this goal drive revenue or profit?
- Does this goal give the executive team something they've asked for or want?
- How does this goal align my marketing team with sales?

METRICS PLANNING

Investment in Lead Generation

Once you've established your goals and expectations, you need to know exactly how much you're spending on lead generation. 89% of organizations use spreadsheets to track spend, but this gives you limited visibility into how your investment tracks to your forecast. You also can't track spend across multiple budgets and line items.

In order to track your lead generation investments, consider a tool like Marketo Financial Management, which tracks budgets in a sophisticated and agile way across all of your marketing programs. Tools like Marketo Financial Management can compare your budget to your current and total spend, and can also allocate and reallocate budget as necessary. Marketo Financial Management also syncs to internal ERP (Enterprise Resource Planning) systems and pushes actual costs to Marketo's Revenue Cycle Analytics, giving you actual data that aligns to program costs. This data makes it possible to accurately assess your programs.



Marketo Financial Management metrics showing planned vs. actual spend

OPPORTUNITY INFLUENCE

Tracking Touches Across All Influencers

In order to track FT and MT for all deals, you need to know how your marketing influences each contact in the sales process—you may have touched influencers more than you have touched the final decision maker. You need marketing automation to connect the dots and show marketing's total contribution to a deal over time.

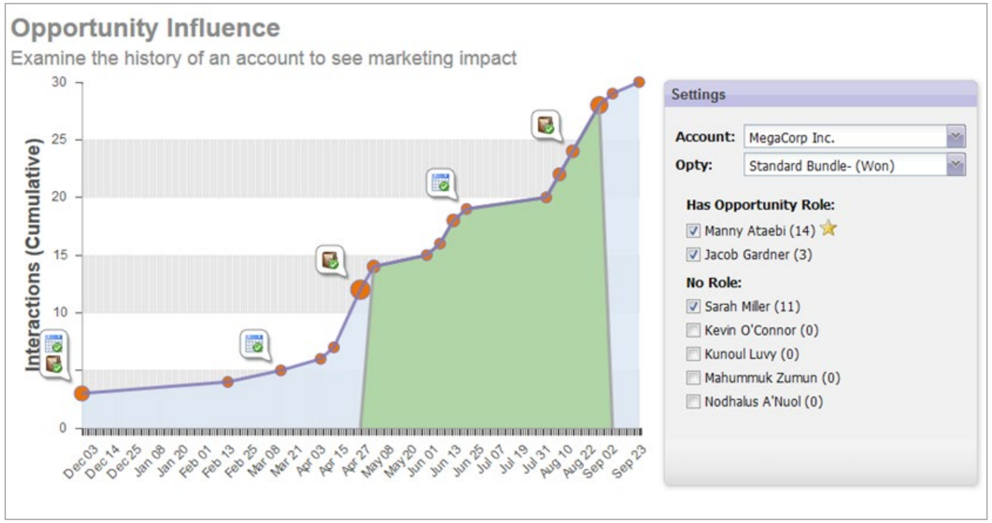
For example, the Opportunity Influence Analyzer in Marketo (at right) shows every marketing interaction with an account over time. The blue portion represents the account before the opportunity was created; the graph turns green when the account became an active opportunity. At first glance, you might get the impression that marketing had little effect on this account—they brought in some leads, but nothing more.

But look at the names that are also associated with the company. If you hover over Sarah Miller's name, you see that she is the CEO. Click on her name and you'll get an entirely new picture. Marketing influenced Sarah many times over the course of her lead lifecycle. She downloaded ebooks, visited the blog, and attended a webinar.

Clearly, she was a heavy influencer in the decision to ultimately sign up for our software. In fact, in this scenario, Sarah asked Manny (her director) to contact the company directly. Without the ability to see all of marketing's interactions with an account, you would miss this level of insight.

To track program effectiveness, you have to track marketing's influence over the entire history of an account.

Marketo's Opportunity Influencer Analyzer



Marketo's Opportunity Influence Analyzer

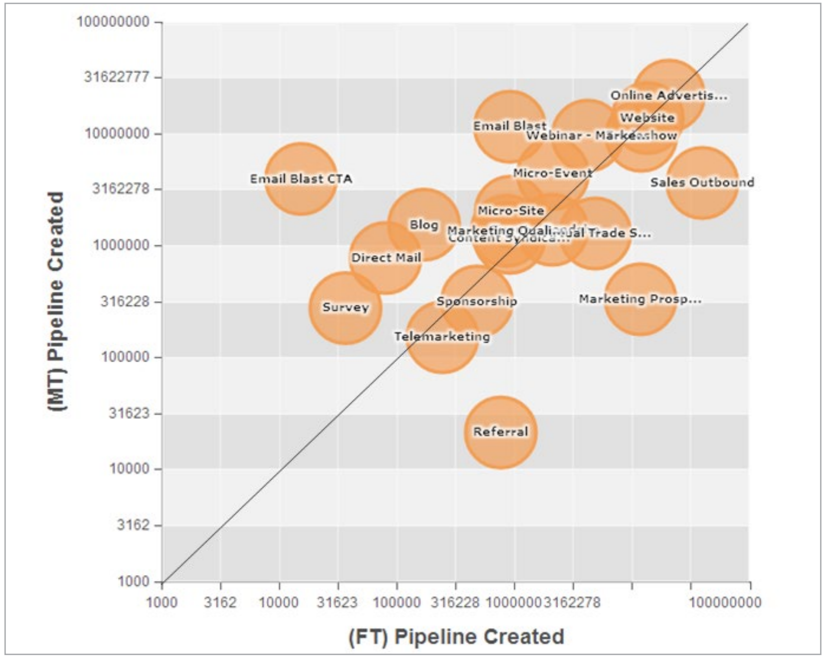
FIRST-TOUCH AND MULTI-TOUCH ATTRIBUTION

Now that you know how much you're investing, you can accurately track return on your lead generation programs. But you can't look at just the first touch or last touch to determine how your overall strategy is working—common wisdom is that it takes seven touches to convert a cold lead to a sale.

You need to examine how *all* of your programs are performing simultaneously.

First-Touch vs. Multi-Touch

A distinction that we make at Marketo is between first-touch (FT) and multi-touch (MT) pipeline. When a deal is made, first-touch credit is given to the program that originally created or acquired the lead. Essentially, your first-touch numbers tell you whether you're attracting the right type of people with Top-of-Funnel campaigns. Multi-touch, on the other hand, examines the value of every marketing interaction with an account in terms of driving opportunities, pipeline, and revenue—this shows you how all of your marketing programs work together.



Actual data from Marketo Revenue Cycle Analytics on FT and MT Program Attribution

FIRST-TOUCH AND MULTI-TOUCH ATTRIBUTION

Pipeline to Investment

To dial in deeper, track your program channel, investment, FT, and MT opportunities created from each channel. You also want to track your MT ratio (pipeline divided by investment) so you know what works and what doesn't. At Marketo, we characterize ratios higher than 10 as good programs, programs scoring above a seven as "fine", and programs scoring less than five as inadequate.

Our pipeline generation data chart shows that on average, 52% of our programs are above a seven. We can see that some of our programs aren't working as well, and we know what needs to be fixed. We know that webinars perform fantastically, with an MT ratio of nearly 54. Tradeshows are a 6.9, sponsored emails a 3.8, and content syndication is a 9.6.

Program Channel	Investment	(FT) Opportunities	(MT) Opportunities	(MT) Ratio
Website	$0	1,247	1,925	N/A
Paid Online (PPC+Email)	$3,919,554	889	1,093	8.4
Webinar	$594,110	228	510	25.8
Nurture Email	$15,750	19	472	898.3
Tradeshow	$1,276,977	426	353	8.3
Nurture Email -CTA	$26,665	13	250	280.8
Micro-Event	$689,858	87	145	6.3
Roadshow	$470,119	80	119	7.6
Sales Outbound	$0	1058	106	N/A
Blog	$0	25	103	N/A
Nurture (New)	$0	0	72	N/A
Content Syndication	$483,264	57	63	3.9
Virtual Trade Show	$329,825	128	58	5.3

Marketo pipeline generation report

Source: Marketo Revenue Cycle Analytics, June 2013
*Percentage of all programs in channel that achieve MT Ratio > 5

ASK THE EXPERTS:

5 LEAD GEN METRICS THAT MARKETERS SHOULD TRACK

David Cain
VP of Marketing, Marketo

Access to quality metrics is the key to any marketer's success. You're investing a lot of time and money into building awareness and demand for your company's products or services, so it's incredibly important to understand whether things are performing as expected. Are they paying off? Are they trending in the right direction?

Every marketer will need a different set of metrics—it all depends on the types of lead generation programs that make sense for your company. But regardless of what your primary lead gen activities are, there are some important high-level metrics that you'll probably want to monitor.

At Marketo, we like to look at these on a monthly basis:

1. **Number of MQLs (marketing qualified leads):** Remember the famous quote in Glengarry Glen Ross? ("These are the Glengarry leads! And to you, they're GOLD!") The fact is, marketers must acknowledge that not all leads are created equal. It's important to put quality measures in place (e.g. a lead score) and only count leads that pass a certain quality threshold as MQLs. By eliminating the "bad" leads from your calculations, you'll get a more accurate picture, and you'll gain the trust of the sales team that depends on you for a living.

2. **Cost per MQL:** All marketers have limited resources. If you're running lead generation, make sure you are maximizing the results you generate. To achieve the greatest results with the resources you have, you'll want to minimize the cost per MQL.

3. **Cost per Sales Accepted Opportunity:** Cost per MQL can be a great early indicator of the health of your lead generation initiatives, but sometimes you have to look further down the funnel. If you have a sales team and they run lengthy sales cycles (anything longer than one week) you'll find that the Cost per Opportunity is an important metric and might not correlate exactly with the Cost per MQL trend. Take a longer term perspective, examining all spend and the resulting opportunities over a period of time. If this metric is trending the wrong way, you'll want to dive deeper into your programs.

4. **First-Touch ROI (by program):** As a lead gen marketer, your job is to determine what programs to run. MQLs and opportunities are helpful, but at the end of the day, it's all about the financial ROI of your marketing investments. Which programs are bringing in quality leads that eventually convert to dollars for your team? How much revenue resulted from those programs? And how much did you spend to generate that revenue?

5. **Multi-Touch ROI (by program):** Many programs will look great from a first-touch ROI perspective. You probably want to invest more in those over time. Other programs will look terrible from a first-touch perspective, but don't be so quick to stop running those programs. Some programs tend to be extremely influential after a lead has been created. If you take a multi-touch ROI view of your programs, you'll find that some of your best performing programs look like losers from a first-touch perspective.

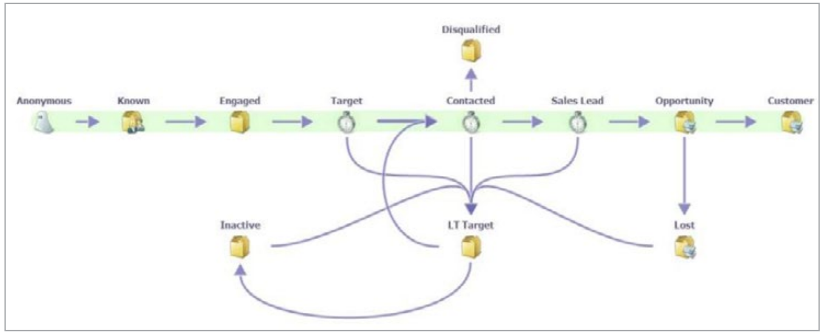
MARKETING'S CONTRIBUTION TO REVENUE

To prove marketing's contribution to revenue, you need to know how much pipeline you are directly creating, and where leads sit in the revenue cycle at any given time.

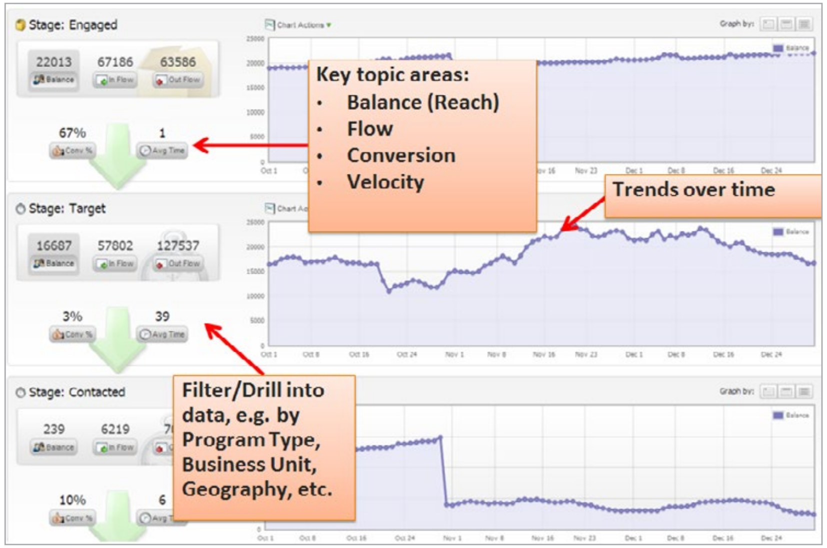
Revenue Cycle Modeler

At Marketo, we look at these important metrics in our Revenue Cycle Modeler, as shown below. The green line represents our sales funnel, where individuals start as anonymous leads, eventually becoming customers.

Digging deeper, our charts show us exactly what's happening in each stage—how many leads are in each stage, how much time leads spend there, conversion rates, and so on. We can also see how those values are trending over time.



Marketo Revenue Cycle Modeler



Marketo Revenue Cycle Analytics Deep Dive

MARKETING'S CONTRIBUTION TO REVENUE

If you are able to dig deep into your data, you can determine how many opportunities you generated during any given period, and forecast what you will generate in subsequent periods. Next, you can cross check to see how you are actually doing when compared to your opportunity quota. Here is one way to present the information.

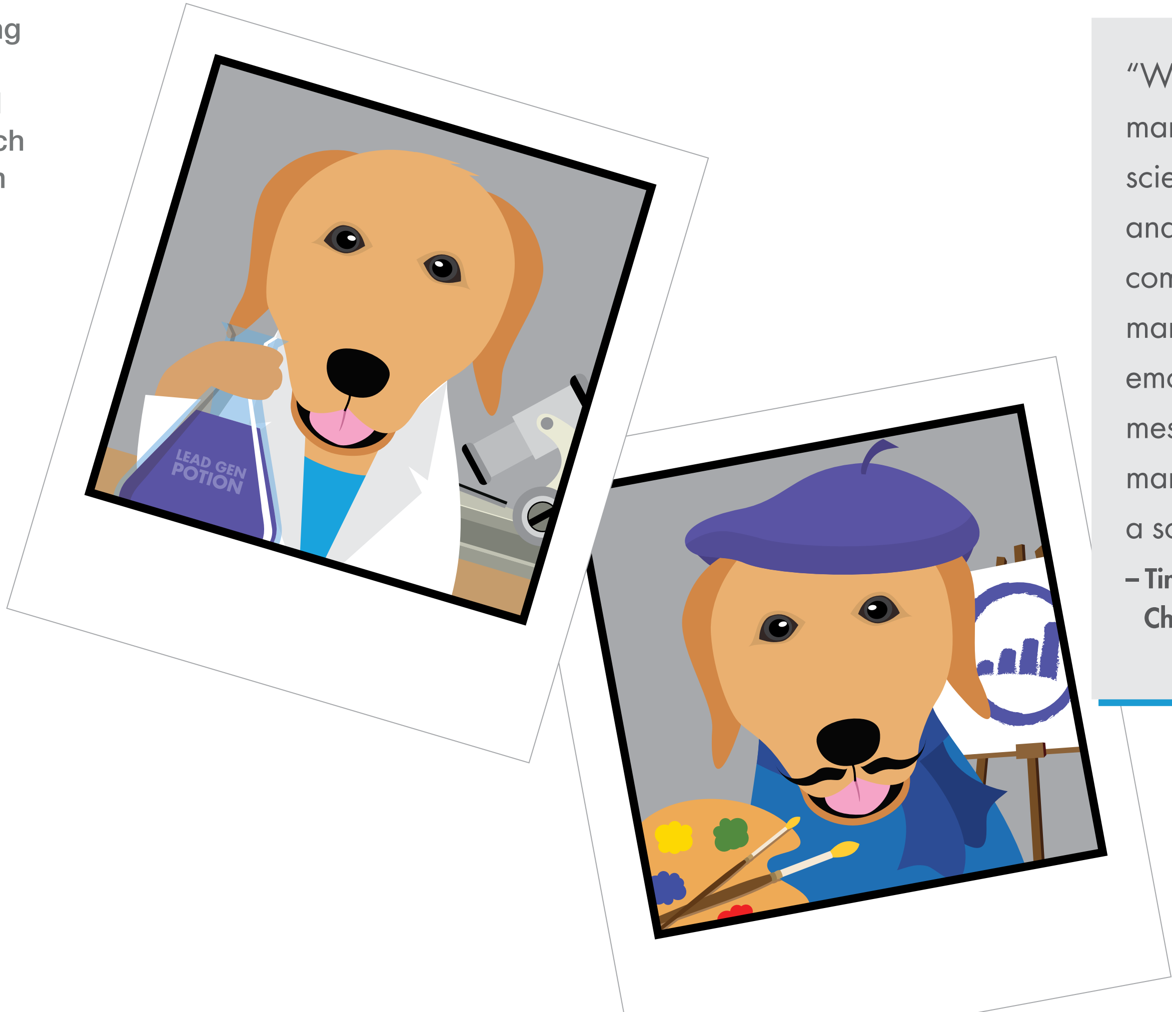
Marketing Forecast	-4	-3	-2	-1	CUR	+1	+2	+3
Commit	244	254	263	263	273	282	295	302
Target	257	266	276	286	292	302	311	321
-4	257	266	276	286	–	–	–	–
-3	–	273	276	270	276	–	–	–
-2	–	–	305	276	276	289	–	–
Previous Month	–	–	–	276	282	302	311	–
Current Month	–	–	–	–	294	305	315	331
	Commit	Target	Forcast	Actual				

Marketing forecasting

FOCUS ON METRICS THAT IMPROVE LEAD GENERATION

When it comes to metrics, you'll deliver the best ROI when you measure to *improve* marketing ROI, not just prove ROI. Each measurement should ultimately guide you toward improved company profitability.

By using sophisticated marketing automation platforms, you can evolve your mix of tactics based on concrete measurements. Each measurement is meant to inform your program improvements and align you closely with strategic objectives.

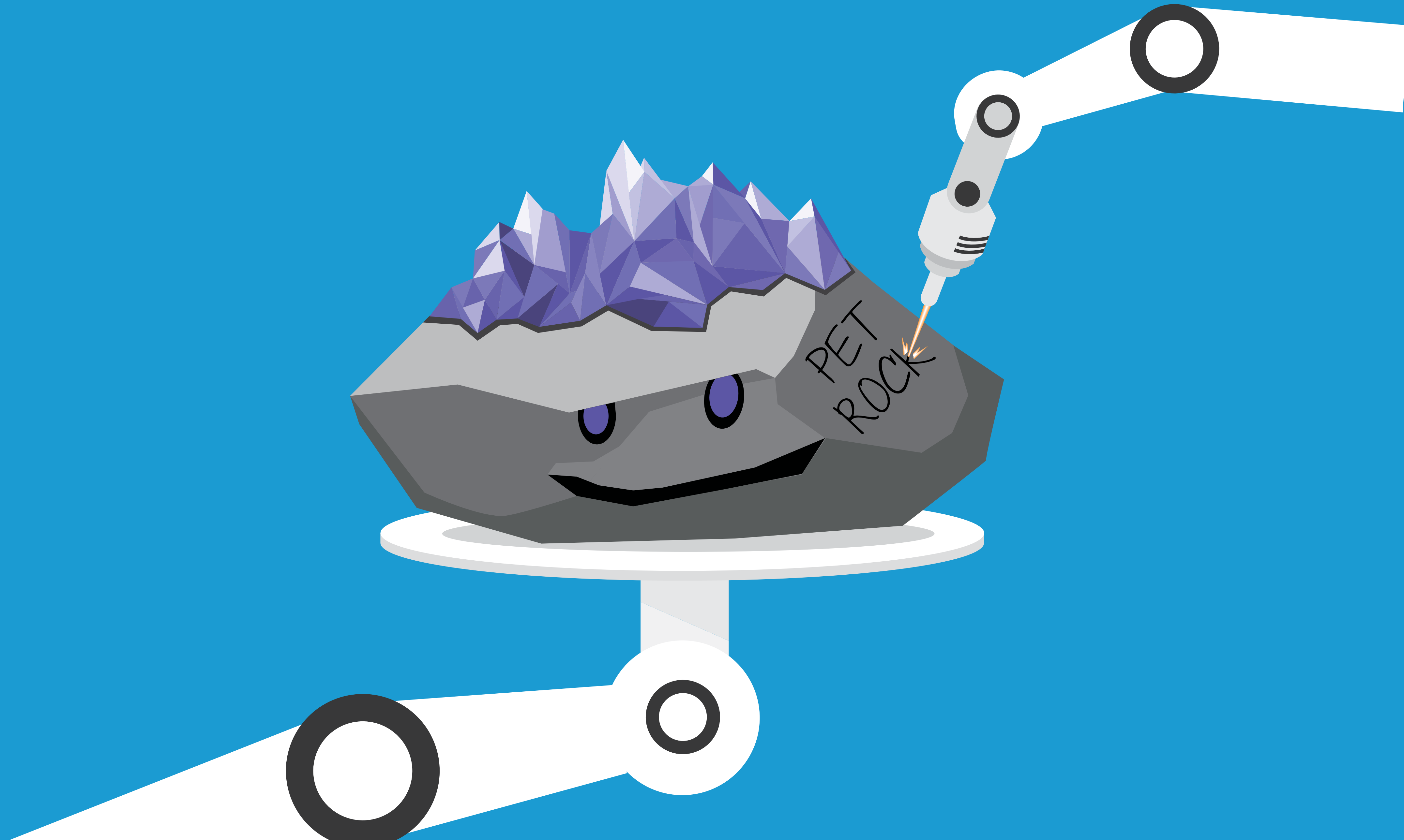


"We're entering an age in marketing where data-science, machine learning, and social data mining are coming to the forefront. Yes, marketers will still need the emotional hook in their message and creativity, but marketing is rapidly becoming a science as much as an art."

– **Tim Barker**
Chief Product Officer, DataSift

CHAPTER FOURTEEN:

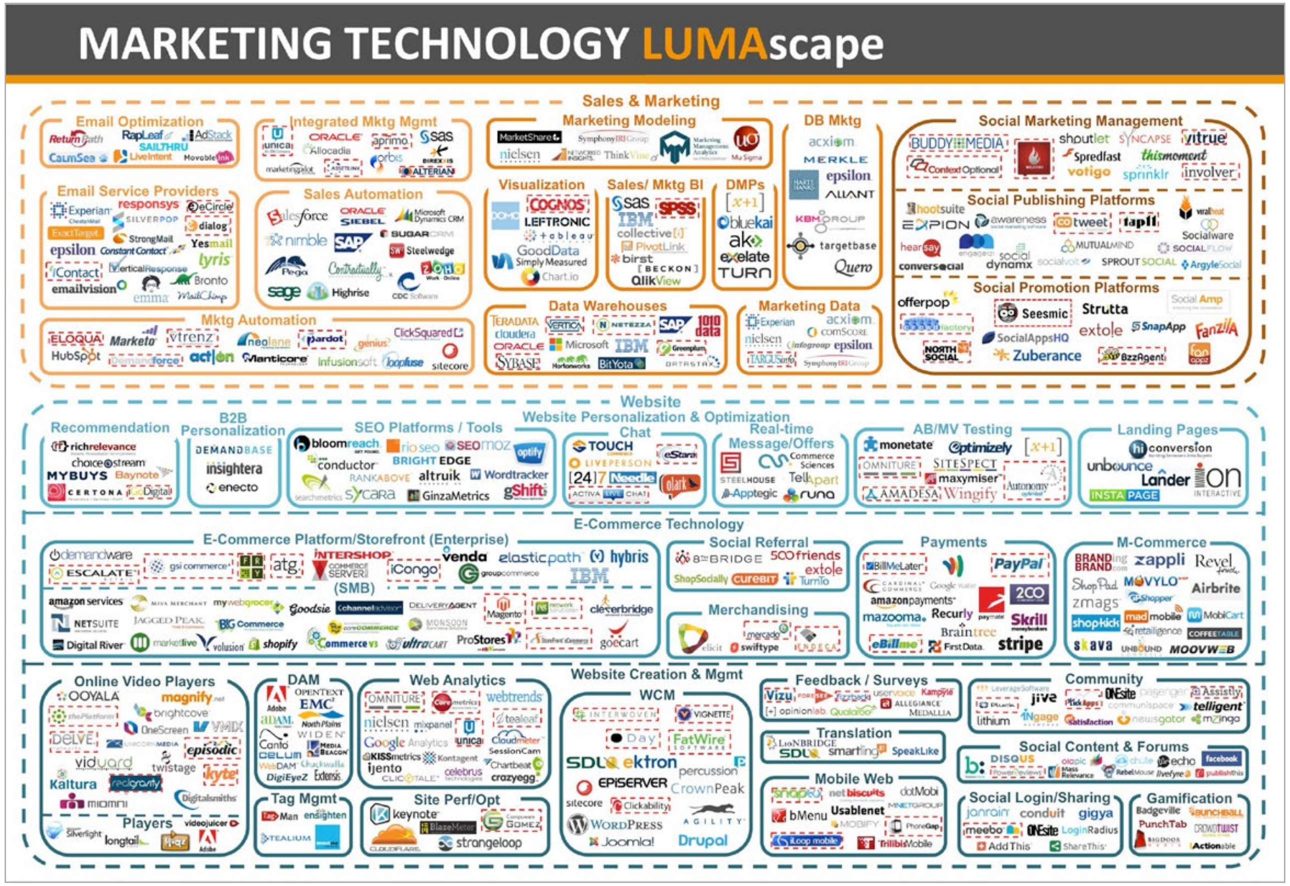
LEAD GENERATION TECHNOLOGY



CHOOSING YOUR LEAD GENERATION TECHNOLOGY

The right lead generation technologies will save you money, help you do more with less, measure and optimize your programs, and ultimately allow you to grow your lead generation programs faster. And that means you can help your company grow faster, and more efficiently.

To give you an idea of the breadth of available technology, take a peek at this Marketing Technology LUMAscape, which attempts to organize today's marketing technology ecosystem. Although you probably won't choose technologies in all of these categories (nor will we go into detail about every single one), you should certainly consider investing in a few.



CHOOSING YOUR LEAD GENERATION TECHNOLOGY

Customer Relationship Management (CRM)

A CRM tool is where your sales teams track leads, opportunities, closed/won deals, and customers. Although CRMs are used primarily by salespeople (and sometimes by your customer service team), you need to know how yours functions and integrates with your other technology solutions. CRM tools integrate directly with marketing automation platforms for closed-loop lead tracking and reporting. Popular CRM systems include Salesforce.com, Microsoft Dynamics CRM, Oracle, SAP, and SugarCRM.

Marketing Automation

Marketing automation allows companies to streamline, automate, and measure marketing tasks. It also allows marketers to create workflows, increasing operational efficiency and growing revenue faster. Marketing automation features include: email marketing, landing pages, campaign management, lead generation, lead scoring, lead nurturing, social marketing, marketing resource management, marketing analytics, and more. Basically, marketing automation enables marketers to excel at the business of marketing (and lead generation)! Popular marketing automation platforms include Marketo and Eloqua (Oracle).

Social Media Management

If you are planning to have a presence on social channels for lead generation, you may consider adopting a social media management tool. This type of technology enables your social teams to easily post, schedule, and engage on all of your social channels. Social media management tools allow you to view multiple social channels at the same time on one dashboard, effectively streamlining your efforts. Popular social media management tools include Hootsuite, Crowdbooster, and Argyle Social.

Social Media Tracking

Social media tracking tools provide metrics, which makes them particularly important for lead generation. Through these platforms, you can track and measure your social interactions, and respond to customer and lead exchanges on all of your social channels. Note that some marketing automation tools, like Marketo, also provide similar social functionality. Popular social media tracking tools include Radian6, Sysmos, and Lithium.

CHOOSING YOUR LEAD GENERATION TECHNOLOGY

Website Analytics

Your lead generation programs will drive traffic to your website, which is why you need a complete picture of how those campaigns are affecting website traffic. You also need to track the effects of your website optimization tactics. Website tracking tools allow you to determine traffic increases and decreases, conversions, content engagement, call-to-action performance, and more. Popular website tracking tools include Google Analytics, Omniture, and Crazy Egg.

Event Technologies

Whether you're hosting physical events or virtual events, a sophisticated event solution can make the big day (or days) go smoothly. Event tools can help you register participants, gather and organize lead data, send notifications to attendees, and follow-up with registrants. They can also help you optimize by collecting attendee feedback, setting up your next event for even more success. For physical events, try Certain or TapCrowd; for virtual events, ReadyTalk and GoToWebinar are popular options.

A/B Testing

You need solid metrics to optimize your email sends, landing pages, URLs, and website for lead generation, and A/B testing tools can give you that data. A/B testing tools can track engagement, clicks, conversion, sign-ups, and more. Marketers can experiment with the placement, wording, and visual elements of their materials, finding the combinations which yield the highest ROI. Popular A/B testing solutions include Optimizely and Visual Website Optimizer (VWO).

> "Marketing is an exciting place to be right now, but it can also feel very overwhelming. Marketers feel pressure to be very metrics-driven, content producing geniuses, social stars, and spreadsheet wizards. I am pro any tool that simplifies some of this for marketers."
>
> **– Heidi Bullock**
> **Senior Director of Marketing, Marketo**

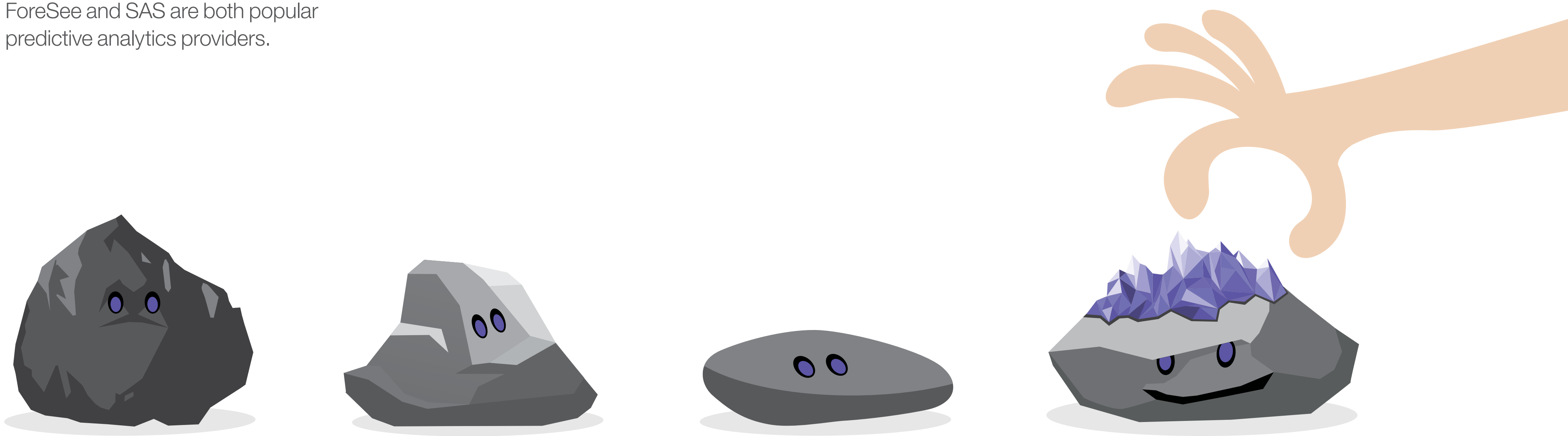
CHOOSING YOUR LEAD GENERATION TECHNOLOGY

Predictive Analytics

Predictive analytics tools leverage historical data about your prospects and customers to predict what they'll do next. Based on information in your marketing automation tool and CRM, combined with data on transactional behavior and social media engagement, these tools build predictive models and assign scores to leads in your database. Marketers can then use these scores to increase engagement and decrease churn. ForeSee and SAS are both popular predictive analytics providers.

SEO Technology

As we've discussed, optimizing your website pages for high search engine rankings is an ongoing—and crucial—task. An SEO tool can help you decide which terms you want to rank for, analyze your competitors, optimize your website, and then track and measure the results. Popular SEO technology providers include MOZ and BrightEdge.



CONCLUSION

LEAD THE WAY!

We know that marketing is a tough job—after all, we're marketers ourselves. We also know that there's no perfect, one-size-fits-all approach to lead generation—just use the channels and tactics that help you reach and engage your target audience. Keep their challenges, goals, and concerns top of mind; deliver information and content that solves their pain points; nurture those relationships and engage them over time—you'll soon be filling your funnel with high-quality leads.

APPENDIX

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About Marketo:
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Marketo (NASDAQ: MKTO) provides the leading cloud-based marketing software platform for companies of all sizes to build and sustain engaging customer relationships. Spanning today's digital, social, mobile and offline channels, the Marketo® solution includes a complete suite of applications that help organizations acquire new customers more efficiently, maximize customer loyalty and lifetime value, improve sales effectiveness, and provide analytical insight into marketing's contribution to revenue growth. Marketo's applications are known for their breakthrough ease-of-use, and are complemented by the Marketing Nation™, a thriving network of more than 190 LaunchPoint™ ecosystem partners and over 40,000 marketers who share and learn from each other to grow their collective marketing expertise. The result for modern marketers is unprecedented agility and superior results.

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