

Lead Nurture



What do you do with a Lead that is relevant to your business, but not ready to buy? Pop it into a Lead nurture cycle of course! You want to ensure that your product/service stays top of mind, and you can pick up on their buying signals to contact them at the right time.

This series sends an email every 10 days to all Leads with a Lead status of 'Keep Warm'. Whenever a Lead clicks on the link in the email, they receive a score of 10 Connect Touch Points. When a Lead reaches a high enough score, the Lead owner receives an alert. This is a prompt to see if the Lead is ready to buy! If they are, the Lead owner will change the Lead status – which will automatically remove the Lead from the nurture cycle. If they aren't ready to buy, they stay in the cycle. The Lead owner will get another alert at 80 points i.e. after even more of email interaction.

How to set up Lead Nurture:

Requirements: Marketing Automation, Lead Management, Campaigns, Gold-Vision Connect, Touch Points, Alerting

Step 1

Design your Automated Email Templates. You'll need to design an **automated email template** in Gold-Vision Connect for each Campaign Stage, with a link that leads to something useful. This could be a link to a blog, case study, whitepaper, ebook, testimonial, video, offer, etc. As soon as you **start** the automated email template in Connect, it is ready to send.

Step 2

Set up your Connect Touch Points. In the administration console navigate to Data > Touch Points > Configure Touch Point Rules.

Add a **new Gold-Vision Connect Rule**, ticking 'clicked a link' and choose the **Mail Shot Type** you will use in your Campaign Stages. Set the score to 10. Simple!

If you'd like to be more specific, you can type the specific URL of each link into the URL box – meaning only this link will receive scores (as you may have other links in your emails that you don't want to score).

Touch Point Rule - Leads - Keep Warm score (Gold-Vision Connect)

Details
Enter a name to identify this rule and select an optional category.

Name: Leads - Keep Warm score
Category: Connect
Active: Yes No
Import and scoring will only occur when the configuration is active.

Action Types
Import the following actions. If no options are selected then no data will be imported.

Actions: Clicked a link Forwarded an e-mail Replied to an e-mail Opened an e-mail

Filters
Using the fields below, select how you would like to filter the incoming data. All filter conditions must be met to pass. For multiple lines of filters, click the plus icon to add multiple items. Select no items to not filter on this field.

Mail Shot Type: Press Release, Telemarketing, Product Promotions and Information, Leads, **Keep Warm**

URL (Clicks Only):
Enter one per line. Use * as a wildcard.

Scoring
You can apply a score to any data imported using this definition plus an ageing setting that will cause the score to degrade over time.

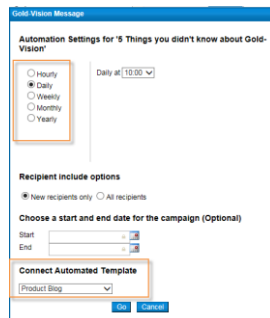
Initial Score: 10
Degrade Score: every 30 days
Zero Score: (Automatically - As defined above)

Step 3

Set up your Automated Campaign. In Lead Management, create your Campaign Source by filtering to Leads with a **Lead status** of **Keep Warm**, which are **not promoted or discarded**. Once set up, your sales team can set their Leads to 'Keep Warm' and they will automatically be added to the Source, and therefore the nurture cycle.

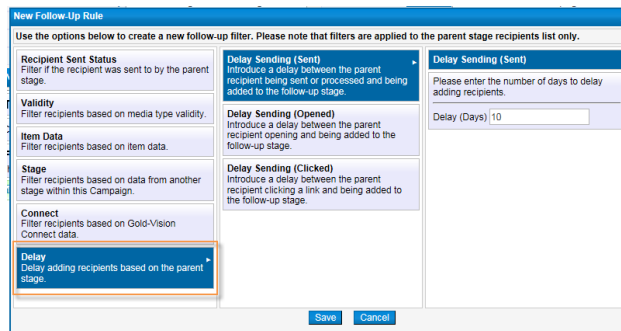
Create a new Campaign and add your first Stage. Choose Email - Connect as your media, and choose the same Type as you selected when setting up the Connect Touch Point Rule, then drag your Keep Warm Campaign Source into the included column.

Run the Stage '**Repeatedly or On A Schedule**'. Set up how regularly you would like your first Stage to run, ensure you've selected '**New Recipients Only**' (or you will repeatedly send the same email to your Leads!) and choose the Automated Template for your first nurture email.



It's really easy to set up the rest of the Stages, and there can be as many as you like!

Create a Follow Up Stage, choosing Email - Connect as your media and setting the same Type as the previous Stage then **add a rule**. Set a **Delay**, we've chosen 10 days. This means that every Lead who has received email 1 of your nurture series, will receive email 2 ten days later. Run the Stage '**Repeatedly or On A Schedule**' and set this one **Daily** – so it can run as soon as the delay has finished. Repeat the above for as many Stages as you would like.



Step 4

Set up your Touch Point Alert:

















In the administration console navigate to Alerting > Configure Alerting.

Set the score to **Raise Over 39**, and select the **Connect Touch Point** you created earlier. Add the action: **Alert Object (Lead) Owner**. Save your alert and press the **Activate** button.

Set up another alert, this time for a score of over 79. If need be, you can keep adding alerts for higher scores.

Now you can leave your nurture series alone, knowing your sales team can place Leads into them, and then draw them out when they are ready to buy. If the Lead is promoted or discarded it will be removed from the Campaign Source and therefore will no longer receive any more emails in this Lead Nurture series.

If the Lead is not promoted, it will stay in the Campaign and if further interest is shown and the Touch Point score reaches 80, the next alert will fire, prompting the Lead owner to call and follow up again.

 <p>5 things you didn't know Gold-Vision... Lead Management Email - Connect - Keep in Touch</p> <p>2 runs</p>	<p>Runs Daily at 12:30 From 30/12/2015 to 29/12/2016 To New Recipients Only Using template: Product Blog</p>	<p>0 Activities 0 Appointments 0 Opportunities 0 Bookings</p>	<p>2 Sent 1 Delivered 0 Opened 0 Clicked</p>		
 <p>Make Marketing work on a budget Lead Management Email - Connect - Keep in Touch</p> <p>2 runs</p>	<p>Runs Daily at 13:00 From 30/12/2015 to 29/12/2016 To New Recipients Only Using template: Whitepaper 1</p>	<p>0 Activities 0 Appointments 0 Opportunities 0 Bookings</p>	<p>2 Sent 1 Delivered 0 Opened 0 Clicked</p>		
 <p>Interview with John Smith from ACB... Lead Management Email - Connect - Keep in Touch</p> <p>2 runs</p>	<p>Runs Daily at 12:30 From 30/12/2015 to 29/12/2016 To New Recipients Only Using template: Case Study</p>	<p>0 Activities 0 Appointments 0 Opportunities 0 Bookings</p>	<p>2 Sent 1 Delivered 0 Opened 0 Clicked</p>		
 <p>Increase your ROI by 20% Lead Management Email - Connect - Keep in Touch</p> <p>2 runs</p>	<p>Runs Daily at 11:30 From 30/12/2015 to 29/12/2016 To New Recipients Only Using template: Brand Value Whitepaper</p>	<p>0 Activities 0 Appointments 0 Opportunities 0 Bookings</p>	<p>2 Sent 1 Delivered 0 Opened 0 Clicked</p>		
 <p>Hear how Jane Doe solved her busin... Lead Management Email - Connect - Keep in Touch</p> <p>2 runs</p>	<p>Runs Daily at 13:30 From 30/12/2015 to 29/12/2016 To New Recipients Only Using template: Testimonial</p>	<p>0 Activities 0 Appointments 0 Opportunities 0 Bookings</p>	<p>2 Sent 1 Delivered 0 Opened 0 Clicked</p>		
 <p>One-time-only Discount Lead Management Email - Connect - Keep in Touch</p> <p>2 runs</p>	<p>Runs Daily at 11:00 From 30/12/2015 to 29/12/2016 To New Recipients Only Using template: Offer</p>	<p>0 Activities 0 Appointments 0 Opportunities 0 Bookings</p>	<p>2 Sent 1 Delivered 0 Opened 0 Clicked</p>		
 <p>Now you can do more with Gold-Vision Lead Management Email - Connect - Keep in Touch</p> <p>1 runs</p>	<p>Runs Daily at 10:30 From 30/12/2015 to 29/12/2016 To New Recipients Only Using template: Product Blog 2</p>	<p>0 Activities 0 Appointments 0 Opportunities 0 Bookings</p>	<p>1 Sent 0 Delivered 0 Opened 0 Clicked</p>	