

# Nurture 101 with the Nurture Queen

# Agenda

The Basics of Nurture Strategy

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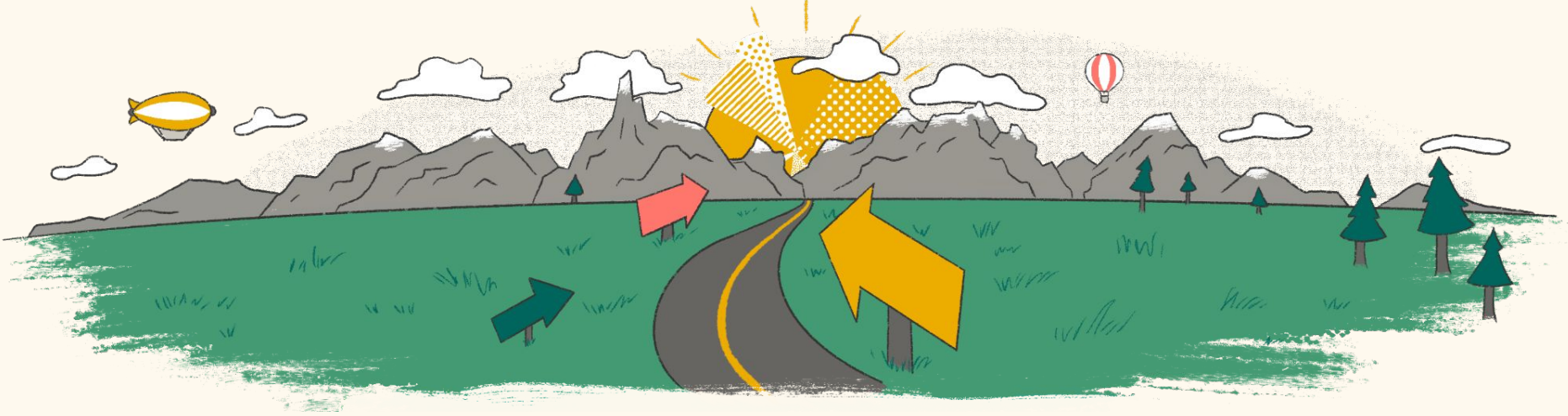
Use Cases & Audience Targeting

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Building Blocks & Considerations

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Q&A



**So you want to build a Nurture...**



# 01 The Basics

Maturity Curve, Getting Started, Goal Setting

# What is a Nurture Program?

Nurture Programs (or Campaigns) provide regularly cadenced email messaging and marketing program execution to a target audience for a **defined purpose**.

They can help **build relationships** and **drive audience engagement** through a consistent flow of information and calls to action.

Nurture programs can use a variety of channels to provide the ultimate prospect & customer experience. **This presentation focuses on the email channel only.**

# Nurture Maturity Curve

Start Here!

## Crawl

25%-50% marketable audience being nurtured

1 marketing channel

Large, Generic Target Audiences

Single Path/Success End Point;  
Limited Exit Criteria

01

## Walk

50-75% marketable audience being nurtured

A few marketing channels used

Targeted Audience Criteria

Multiple Streams w/ Defined  
Movement / Exit Criteria

02

## Run

75-100% marketable audience being nurtured

Omni Channel

Advanced Audience Criteria w/ Possible  
Program/Campaign Overlap

Multiple Levels of Personalization

Advanced Stream / Cadence Changes

03

# Getting Started - Core Decisions

## Purpose

- What are we trying to accomplish?
- What does success look like? How can we identify this (proxies)?

## Target Audience

- Who should **receive** the emails?
- Who should **not receive** emails?
- When should people **exit** the nurture?
- Are there ongoing processes that will qualify records for this nurture?

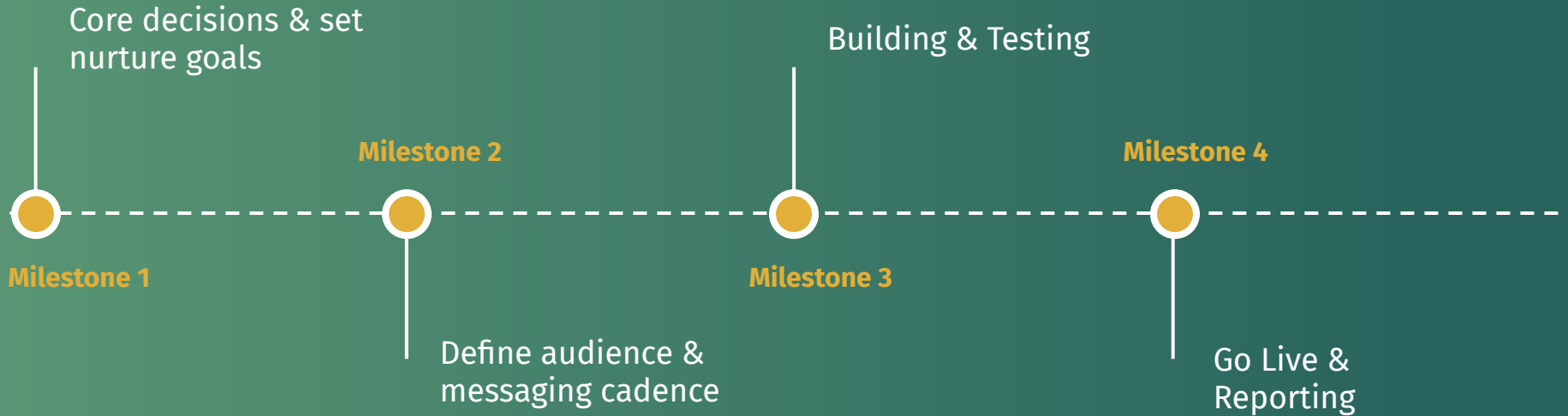
## Content

- Who is responsible for creating the content? What is the timeline for completion?
- Is the content offered elsewhere? Should we exclude previous engagement?

## Timing

- How frequently should people receive emails?
- When does this nurture end/turn off?
- What stages of the buyer's journey should be considered?

# Steps for Building a Nurture

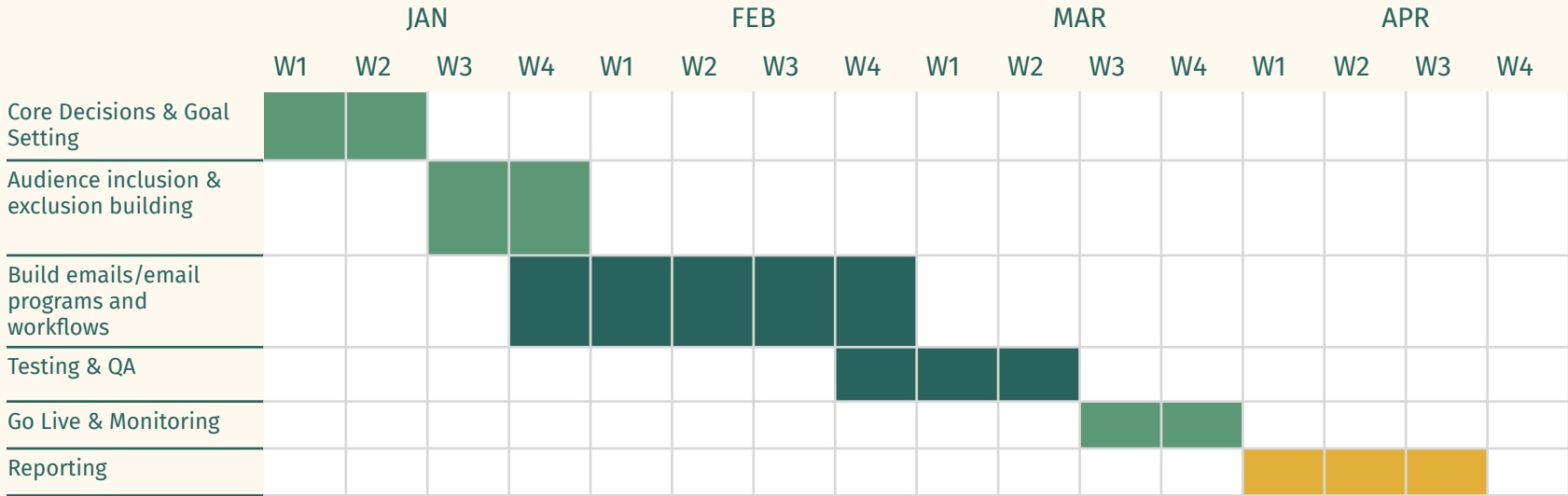




# Process Steps

- 1) Set Nurture Goal(s) & Make Core Decisions
- 2) Define Audience Inclusion / Exclusion Criteria
- 3) Define Messaging Cadence
- 4) Build Email Programs/Workflows
- 5) Testing / QA
- 6) Program/Workflow Walkthrough & Documentation
- 7) Go Live!
- 8) Reporting

# Example Gantt Chart



# Defining the Goal of the Use Case



## Example Goal:

- Re-engage SRLs by offering email content to convert to MQLs
- Timeline is 8 weeks
- Expected result is 100 MQLs & \$10k in pipeline revenue

# Nurture Goal Categories



Funnel Movement  
MAL > MEL > MQL



Upsell Service Levels



Cross Sell Additional Products



Product Sign Up (PQL)



Product Adoption and New  
Features



Target Account Warmup



# 02 Use Cases & Audience Targeting

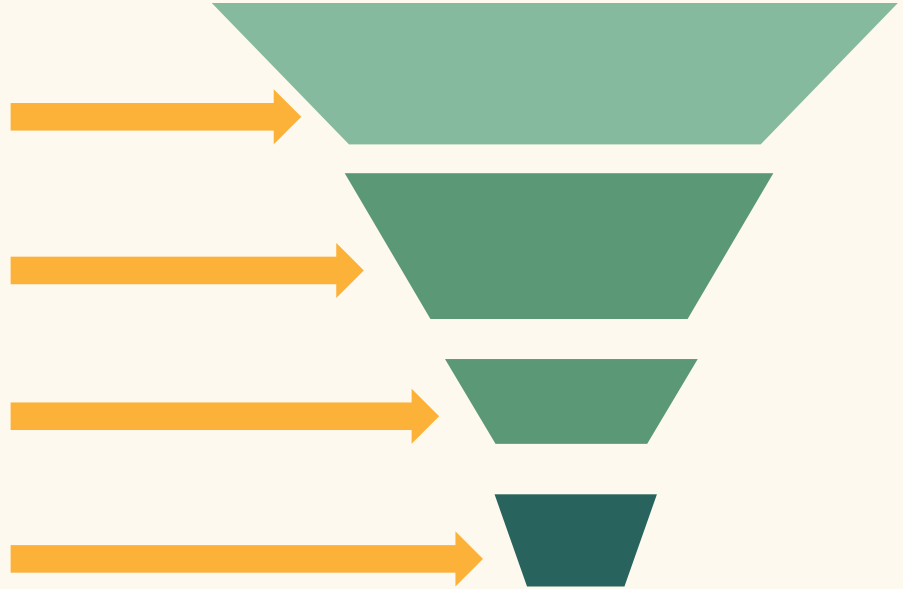
# Defining the Nurture Use Case - Net New

**SPEED DATING** Get more information from MALS to personalize your nurture content

**THRESHOLD** Nurture MELs to get them to MQL

**SALES DEVELOPMENT ASSIST** Nurture MQLs & SALs based on MQL source to get them to an open opportunity

**OPPORTUNITY ASSIST** Nurture SQLs to get to Customer/ Closed- Won Opportunity



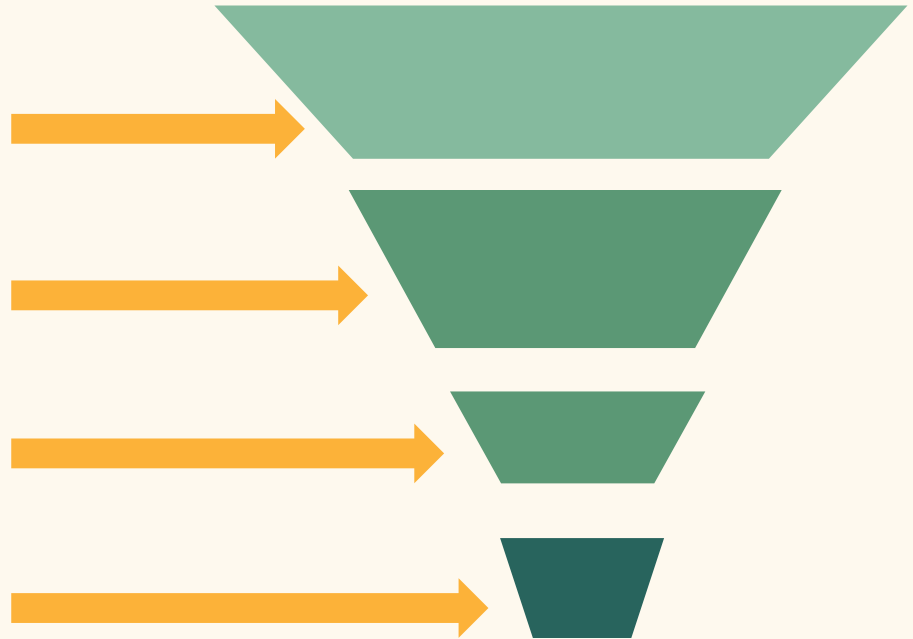
# Defining the Nurture Use Case - Customers

**ONBOARDING** Nurture new customers to take initial actions within the product/through the service

**ADOPTION** Nurture customers to increase usage of product/service (adding more users/using new features within the product)

**LOYALTY** Nurture customers to participate in customer loyalty programs & become champions of the product/service

**UP-SELL/CROSS-SELL** Nurture customers to purchase more products/services



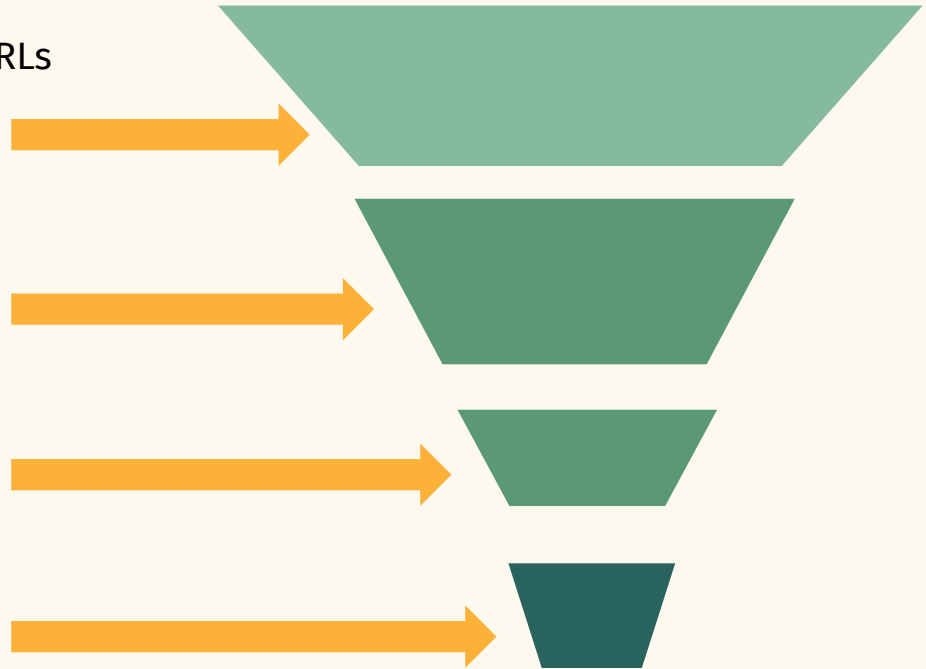
# Defining the Nurture Use Case - Re-Engaged

**RESTART** Get more information from those MRLs that have insufficient data. (MQL > Recycle)

**SECOND CHANCE** Nurture SRLs based on recycle reason (Early Stage Opportunity > Recycle)

**FINAL SHOT** Nurture SRLs based on recycle reason/ Closed Lost Reason (Late Stage Opportunity > Recycle)

**WIN BACK** Nurture your Former Customers (Closed Won > Closed Lost)





# Layers of Personalization



**Product**



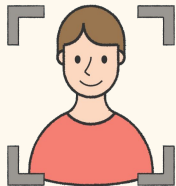
**Funnel Stage**



**Use Cases**



**Send in Timezone**



**Persona**



**Recent Content Consumption**



**Previous Behavior with Email**



**Preferred Language**



# 03 Building Blocks & Considerations

# Nurture Terms



**Audience Lists** - A static or active list where contacts are added to qualify them for your nurture

**Workflow** - A flow of actions, aka nurture campaign/program

**Enroll in Workflow** - A flow action that can transition records to another nurture workflow/campaign

**Properties** - Fields on contacts/company objects

**Branches** - Direct your contacts to a separate set of actions



**Nurture Segmentation** - Evaluates entire database into mutually exclusive target segments based on choice logic

**Engagement Program** - A program type that is used for nurture; contains campaigns/workflows to add/remove audience & contains nurture cast programs

**Nurture Cast Program** - Holds the actual email & send campaign/workflow

**Stream Transition Rules** - Logic that determines which engagement program stream a records should move to aka branches/stages



marketing cloud  
account engagement

**Audience Lists** - Easiest to use lists that contain a set of prospects for entry

**Engagement Studio** - Nurture campaign/tool to build nurture flow

**Stages** - How prospects move through the nurture

**Actions** - Something you can 'do' to your prospects

**Triggers** - Based on prospect behaviours you're interested in monitoring

**Rules** - Rules are used to define paths for your prospects based on certain criteria/conditions.

# Nurture Elements: Nurture Management

<p><b>Action</b></p>			
<p><b>Nurture Architecture</b></p>	<p>Workflows &amp; Branches</p>	<p>Engagement Program &amp; Streams</p>	<p>Engagement Studio</p>
<p><b>Nurture Prioritization /Traffic Director</b></p>	<p>A series of workflows that manage "Qualified Lists" - and then a workflow to set a property based on list membership; Nurture workflows use the property value for enrollment, exit, or re-enrollment</p>	<p>A series of campaigns in program that manage the "Qualified Lists"; Smart campaigns in Engagement Programs that use those qualified lists to add/pause/resume/exit</p>	<p>Use engagement studios to manage "Qualified Lists" - and then set up nurture engagement studios to enroll/trigger records based on list membership</p>

# Nurture Elements: Audience Entry & Exit

<b>Action</b>			
<b>Audience Activation</b>	Workflow enrollment criteria: Trigger step in workflow, manually add contacts, enroll from another workflow	Campaign within the program to add people into engagement program & a "program status change"	Enroll workflow action - use Dynamic list or Static list
<b>Audience Exit</b>	Workflow Goals criteria is met or through Unenrollment & suppression under Workflow "Settings and Notifications"	Smart campaign that adds records to an "exhausted nurture" list/"permanently paused" list	Action flow step to add to list/send an alert/assign a record; no more send email actions

# Nurture Elements: Audience Transitions

Action			 marketing cloud account engagement
<b>Pause &amp; Resume</b>	Pause could use Workflow Goals or Unenrollment & suppression & Resume would use "Re-enrollment criteria set in Enrollment triggers" or another enrollment criteria setting like the use of another list Wait Options (Action or Rule steps)	Smart campaigns that trigger off of nurture segmentation changing to something related to a different nurture (pause) or changing from a different nurture segmentation to a segmentation related to the local nurture/nurture they were in before (resume) Wait Steps (Campaign flow step)	Unenrollment & suppression & Resume would use "Re-enrollment criteria set in Enrollment triggers" or another enrollment criteria setting like the use of another list Wait Options (Action or Rule steps)
<b>Stream/Path Transitions</b>	Branches to send emails or branches to enroll in other workflows	Smart campaigns with criteria to change stream within the engagement program Transition Rules within stream settings	Use actions, triggers, or rules to move records to different path Trigger: prospect opens email Rule: if prospect title contains "x" Action: added to list, sent notification, add to sfdc campaign

# Key Takeaways



Every Nurture has a SMART goal



Personalize the nurture content



Start small & build big



Work towards multi-channel



Keep a realistic timeline with stakeholders



Report & Optimize Regularly

# Additional Resources

## MCAE

- Engagement Studio Overview: [https://help.salesforce.com/s/articleView?language=en\\_US&id=sf.pardot\\_engagement\\_studio\\_overview.htm&type=5](https://help.salesforce.com/s/articleView?language=en_US&id=sf.pardot_engagement_studio_overview.htm&type=5)
- Mastering Engagement Studio: [https://pardot.marcloudconsulting.com/l/914051/2022-10-25/phx7m/914051/1666699574gHdufHR4/Master\\_Pardot\\_Engagement\\_Studio\\_ebook.pdf](https://pardot.marcloudconsulting.com/l/914051/2022-10-25/phx7m/914051/1666699574gHdufHR4/Master_Pardot_Engagement_Studio_ebook.pdf)

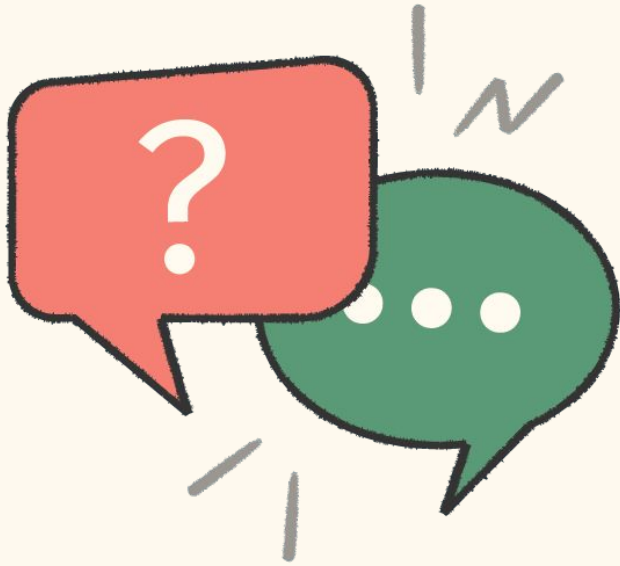
## Hubspot

- Free Lead Nurturing Lesson: <https://academy.hubspot.com/lessons/understanding-lead-nurturing>
- Building Workflows: <https://knowledge.hubspot.com/workflows/create-workflows>
- Workflow Actions: <https://knowledge.hubspot.com/workflows/choose-your-workflow-actions>

## Marketo

- Basics of Lead Nurture: <https://business.adobe.com/blog/basics/lead-nurturing>
- Nurture Tracking & Reporting for Stakeholders: <https://etumos.com/marketing-technology-resources/nurture-engagement-reporting-to-guide-a-results-based-marketing-strategy/>
- Implementing Traffic Director: [https://www.youtube.com/watch?v=XI8wyzE5SNo&list=PLfBPk9lu\\_qCwt6QAEQPxBDWjwKGfI7D0S](https://www.youtube.com/watch?v=XI8wyzE5SNo&list=PLfBPk9lu_qCwt6QAEQPxBDWjwKGfI7D0S)
- Moving towards an advanced nurture build: <https://nation.marketo.com/t5/product-blogs/on-demand-webinar-behavioral-based-advanced-nurtures/ba-p/314482>





**Questions?**