



market

# Nurture Playbook

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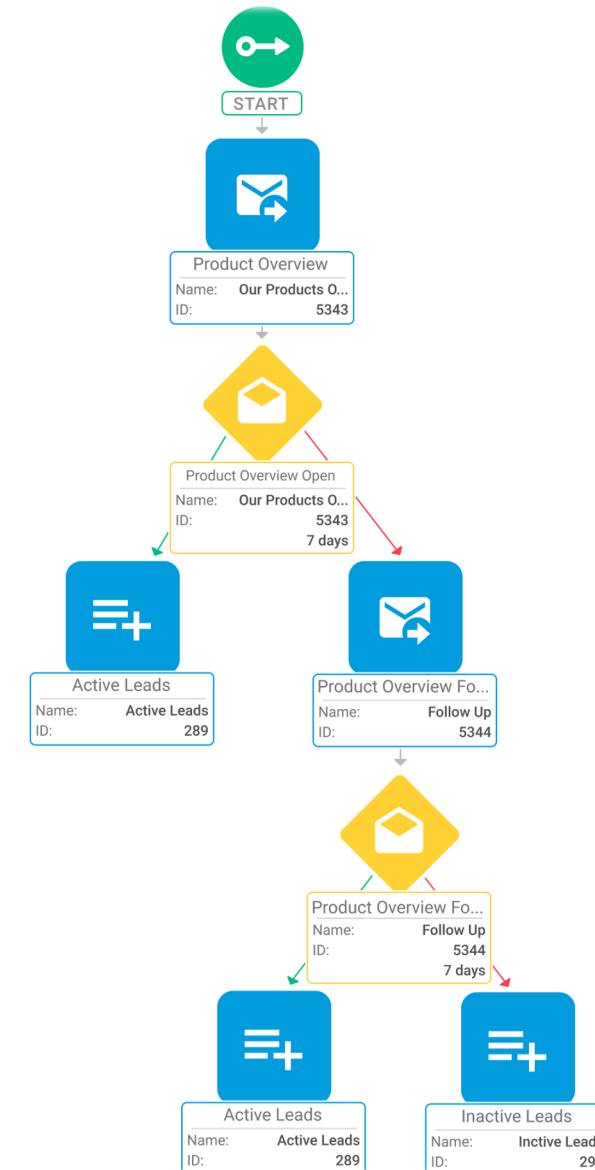


# Introduction to the Nurture Playbook

Understanding and utilizing nurtures is key for any marketer looking to grow their leads through Sugar Market. Nurtures can reference nearly every piece of data within the platform, giving you the option to use that information to target and automate key interaction points between you and your leads or contacts. While nurture capabilities are vast, their designs are generally quite simple. This playbook is designed to give you some insight into how nurtures work in the Sugar Market platform, highlighting the simplicity of the latest version of our Nurture Builder.

# Distribution List Sorting Nurture

Use Case	You want to send an email to a new batch of promising leads and to sort these leads so they are placed into a distribution list according to their level of engagement.
Goal	To sort new leads into distribution lists according to their engagement with your messaging. By sorting these leads into their respective engagement lists, you are able to target specific communications to these lists at a future time.
Who	New leads.
How	Add nurture participants via form submissions, scoring, or when specific values match your criteria in a distribution list.
What	The nurture starts with an initial email with a strong call to action. It then determines if the record engaged with the email within 7 days. If they open the email within the 7 days, they are added to the "Active Leads" distribution list. If they do not, they are sent a second email, attempting one more time to have them engage. If they do, they are added to the "Active Leads" distribution list. If they do not engage with either email, they are placed into the "Inactive Leads" distribution list, marking them as a lead that isn't currently interested.
Suggestions	You can use the nurture to further categorize your leads into different distribution lists based on region or area of interest.



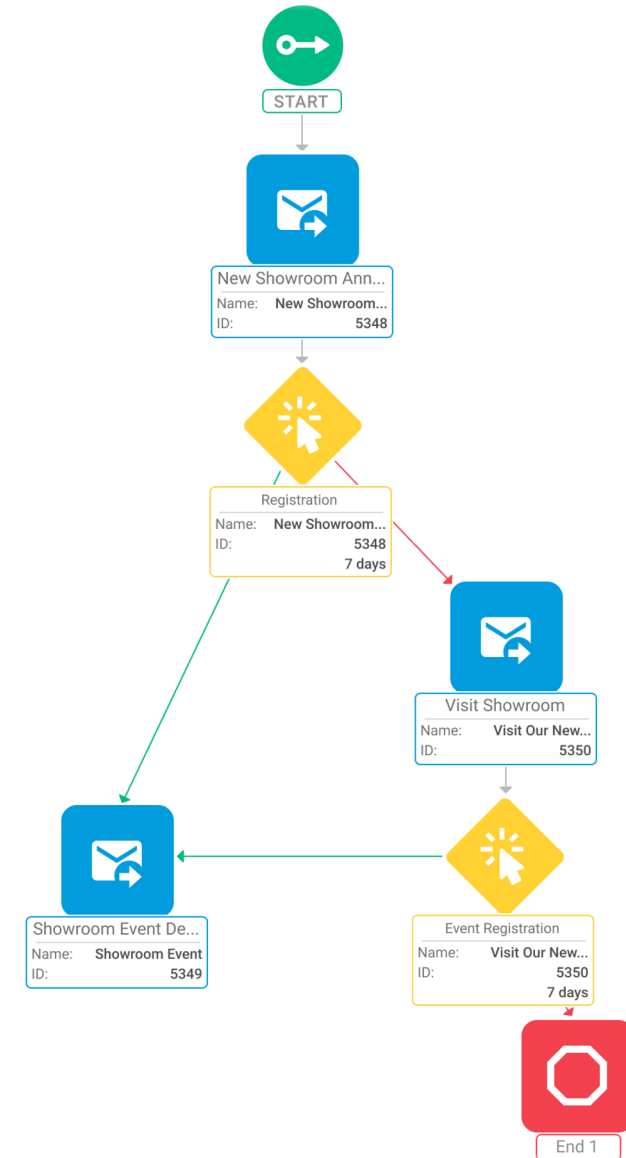
# New Prospect Nurture

Use Case	New prospects entering your system need to be sent informative emails to keep your brand top of mind.
Goal	To project your brand as a helpful resource to prospective clients and to differentiate yourself from your competitors.
Who	New prospects entering your system that need to be nurtured before direct contact.
How	Prospects can be placed into this nurture upon form submission, automatically through a listener as they enter your CRM, or through a list that you manage.
What	We recommend sending helpful, informative emails once or twice a month. The example nurture here shows a simple nurture with a series of informative emails spaced two weeks apart.
Suggestions	New prospect nurtures should be full of open-ended, relevant, helpful information for promising prospects. They should see your emails as a source of information relevant to their position or industry. Note that these nurtures can also be useful for reaching out to existing contacts who may need help.



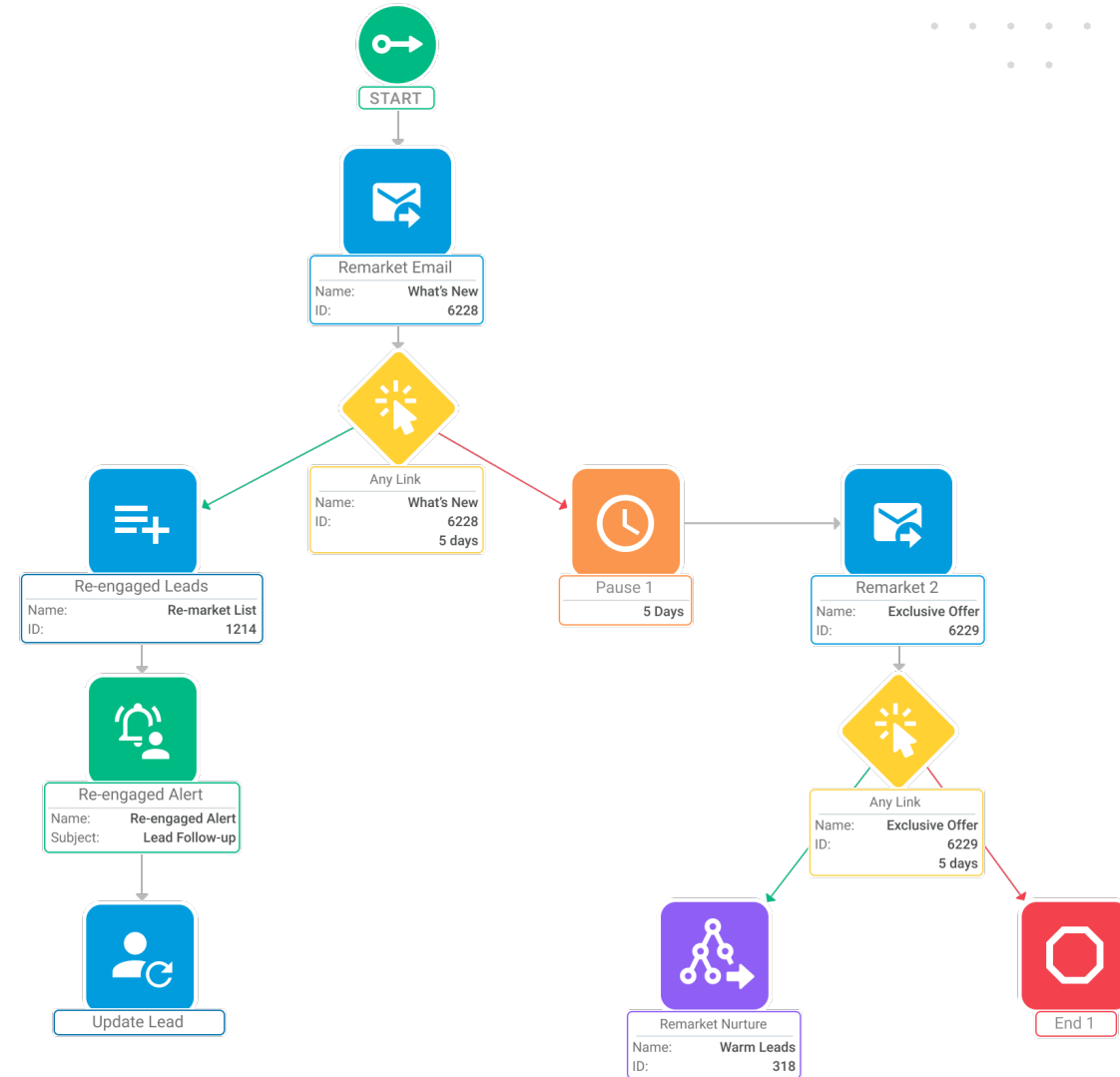
# Promotional Subject Swap Nurture

Use Case	You want to promote a showroom opening event.
Goal	To send a lead multiple emails notifying them about the event, and either follow up with further information about the showroom, or implement a stronger call to action if they do not engage.
Who	Leads and contacts that are located near the showroom.
How	Create a dynamic list for all leads and contacts that are located near the showroom.
What	The initial email send notifies people of a new showroom opening. If the contact doesn't open the email within 7 days, they are sent the same email, but with a new subject line to prompt them to open the message. If the contact opens the email, they are sent a follow-up email with the showroom opening details. If they do not click on the link in the first email, but click in the second, they are still sent a follow-up.
Suggestions	This nurture utilizes the ability to send follow-up emails based on whether the lead engaged with the initial message, which prevents you from sending redundant emails to contacts that are already engaged. Sending redundant emails to unengaged leads could begin to hurt your sending reputation.



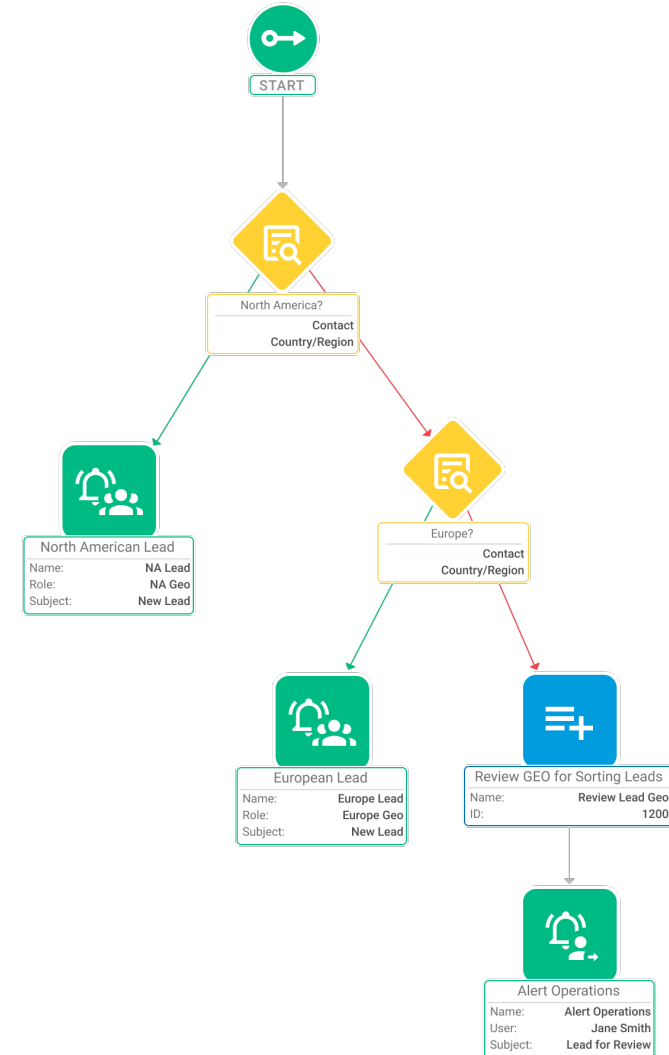
# Remarketing Nurture

Use Case	You want to win back the interest of your colder leads.
Goal	By remarketing to colder leads, sales can reach higher into the funnel for that earlier human touch and marketing can build a stronger digital relationship with leads, whether they have been passed to a salesperson or not.
Who	Remarketed leads are either not sales-ready so they are passed back to marketing from sales, or they originated from outbound sales efforts and did not become opportunities and are therefore passed back to marketing for continued nurture.
How	Create a list of leads that have been flagged for remarketing.
What	When a lead is included in this list, they will be placed into this nurture. If the cold lead engages immediately, the lead will be added to a re-engaged list, an alert will be sent to the sales rep, and the lead status will be updated. If there is no immediate engagement, the lead will continue to receive emails to gauge lead interest.
Suggestions	There are a number of decisions when setting up remarket campaigns. Based on how the lead ended up in the remarketing status, you may want the emails to be sent from a particular sales rep versus a generic email address like marketing@company.com. This provides the benefit of continuing the familiarity of the sales rep and allows the lead to quickly reply back. Consider the frequency and timing of communications. You may want to add a pause as the first step or increase the time between emails to give the lead some time to become available or interested again.



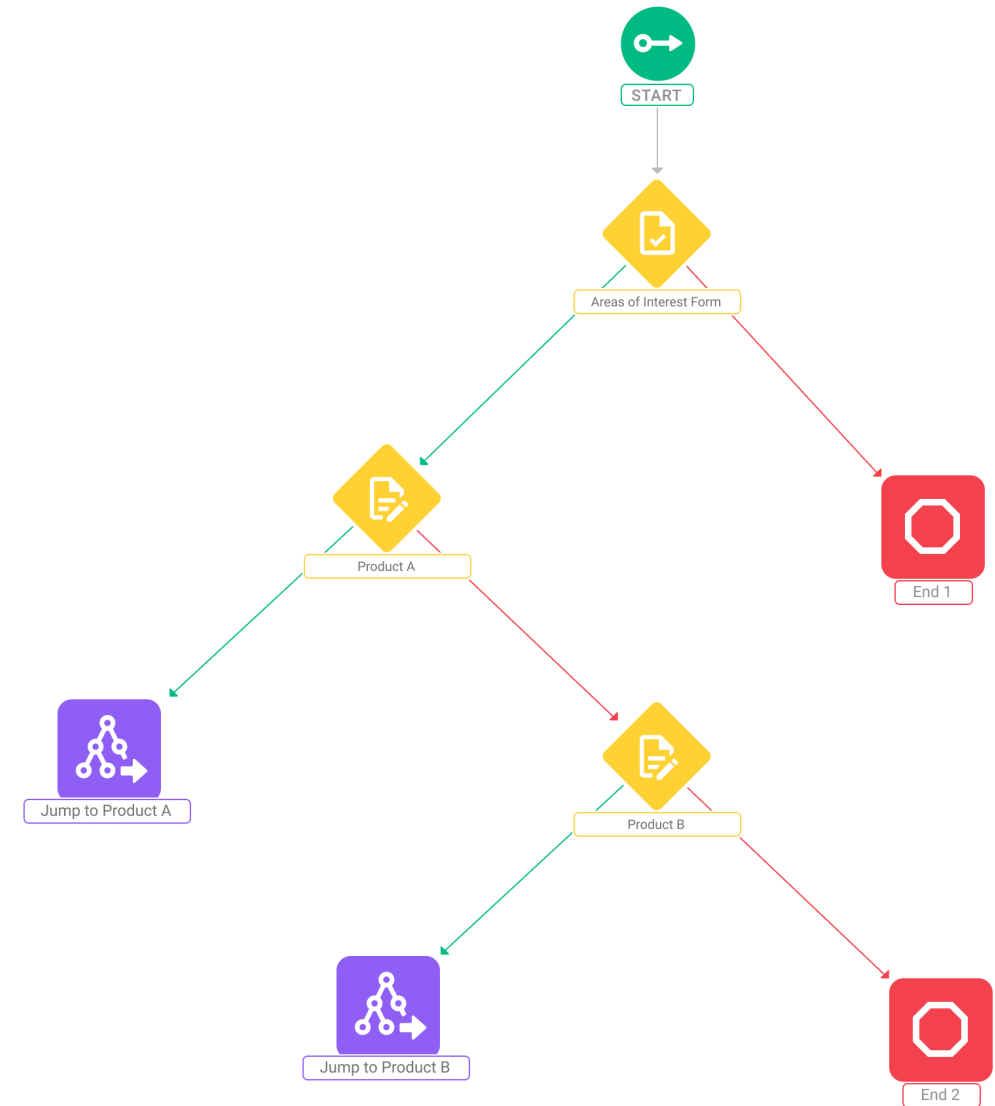
# Sorting Alert Nurture

Use Case	You want to send an alert to certain roles/groups depending on where the lead is located geographically.
Goal	Automate the sorting process of alerts while using one universal entry method.
Who	Leads
How	Leads can be placed into this nurture from a lead scoring profile, or from a form completion.
What	When a lead hits a high enough lead score or fills out a form, they will be placed into this nurture which will check the region the lead is from and sends an alert to the appropriate territory role/group. This nurture allows you to automate the sorting process of alerts while using one universal entry method.
Suggestions	Nurtures are not strictly for messaging. Because of a nurture's ability to retrieve data and perform actions based on that information, nurtures are great for sorting data and performing internal actions, such as sending alerts based on data about the contact, changing contact information, updating a task or opportunity. Various types of changes and internal messaging can be done based on the information you have on a record. <b>Note:</b> If the lead is added through a scoring action or form completion you have the option to select if those leads can go through this nurture workflow more than once. This option is available on the nurture settings page.



# Sorting to Multiple Nurtures

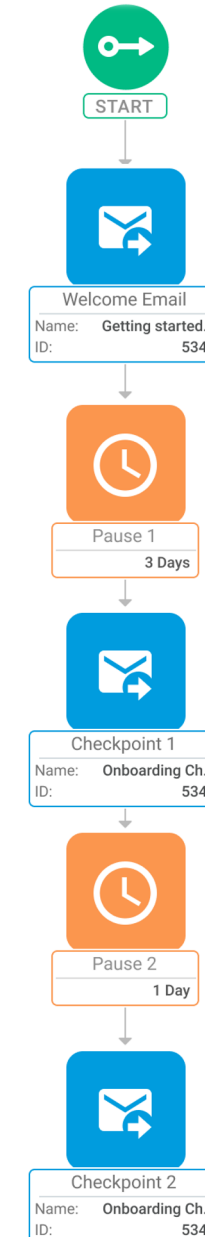
Use Case	You launched a landing page a few months ago and now you have a series of marketing emails you want to send to registrants of that landing page, but the emails need to target two different groups depending on how they responded to the form questions.
Goal	Sort registrants into nurtures that speak directly to their area of interest depending on their form answers.
Who	Previous registrants.
How	Create a distribution list of previous registrants, and then include that list in the nurture.
What	Jump steps move a contact to a different step within the nurture, or to an entirely different nurture. In this example, we jump these contacts to different nurtures depending on their response to the "Area of Interest" question on the landing page.
Suggestions	This nurture can be changed to sort people into nurtures depending on any contact or opportunity data you choose.





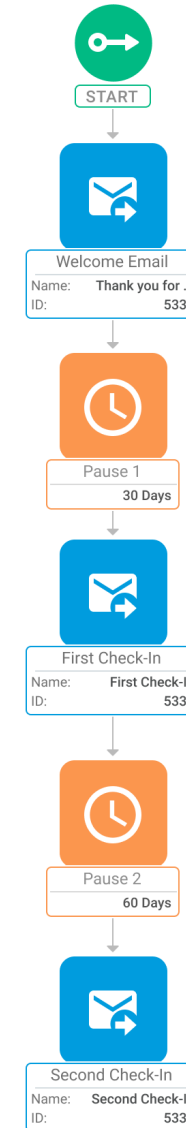
# Onboarding Nurture

Use Case	A new deal has closed and the customer will need to be onboarded onto the platform quickly. This nurture ensures that the customer is immediately engaged in the onboarding process and that they receive important information about the process automatically.
Goal	Increase adoption and customer engagement through welcome emails and reminders for new clients about the onboarding process.
Who	Contacts that have recently become new customers.
How	Use a report of relevant closed/won opportunities as an include list and enable the auto-refresh option. Since the type of onboarding package needed may depend on the type of deal, set up multiple reports for different deal types so contacts are placed into the proper nurture upon close.
What	The first email begins the onboarding process by providing important information the customer needs to get started. Subsequent sends continue guiding the customer through the onboarding process by sending appropriate information or checking in with them at key checkpoints along the way.
Suggestions	New contacts in existing accounts that need to be put back through onboarding can also be manually placed into this nurture.



# Closed Won Nurture

Use Case	An opportunity has closed and you want to schedule check-in emails to follow up with them throughout the life of the contract to ensure that they are satisfied with the product.
Goal	Automate initial contact and key follow ups for new clients after the start of their contract.
Who	Contacts that are closed/won.
How	Include a distribution list of recently won prospects.
What	This nurture automates key engagements for new customers. The nurture sends an initial email to the client when the opportunity is won, thanking them for their business. They are then placed into a workflow that automatically sends follow-up emails checking in on the client. Here we have a check-in email one month after closing, and another after 3 months.
Suggestions	This email should be set up to send from the sales associate who owns the opportunity or contact. Ensure that the reply-to email is the associate's email address. You may want to increase the rate of emails as the contract renewal date approaches.





The possibilities with nurtures are endless; these examples are only the beginning. As a marketer, we understand that you have a myriad of needs for automated communication. Sugar Market's nurture program can segment out the individuals you are trying to reach and set all communication on autopilot while you focus on other important marketing strategies.

To learn more about nurtures or other Sugar Market programs, please reach out to [clientsuccess@sugarcrm.com](mailto:clientsuccess@sugarcrm.com).