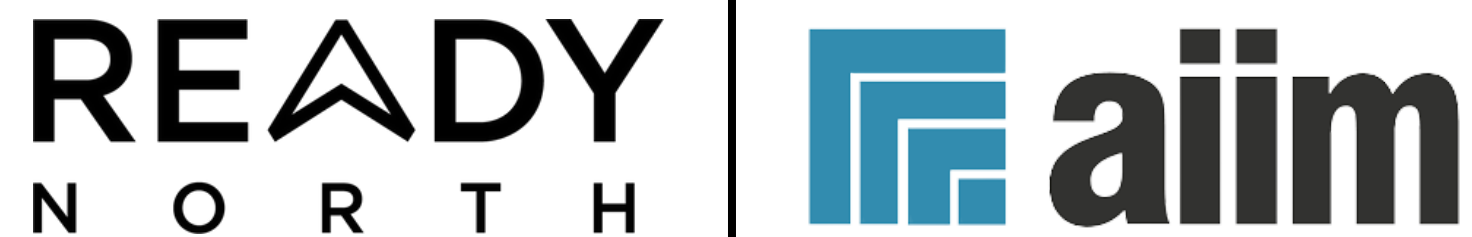


# WORK SMARTER, NOT HARDER

---

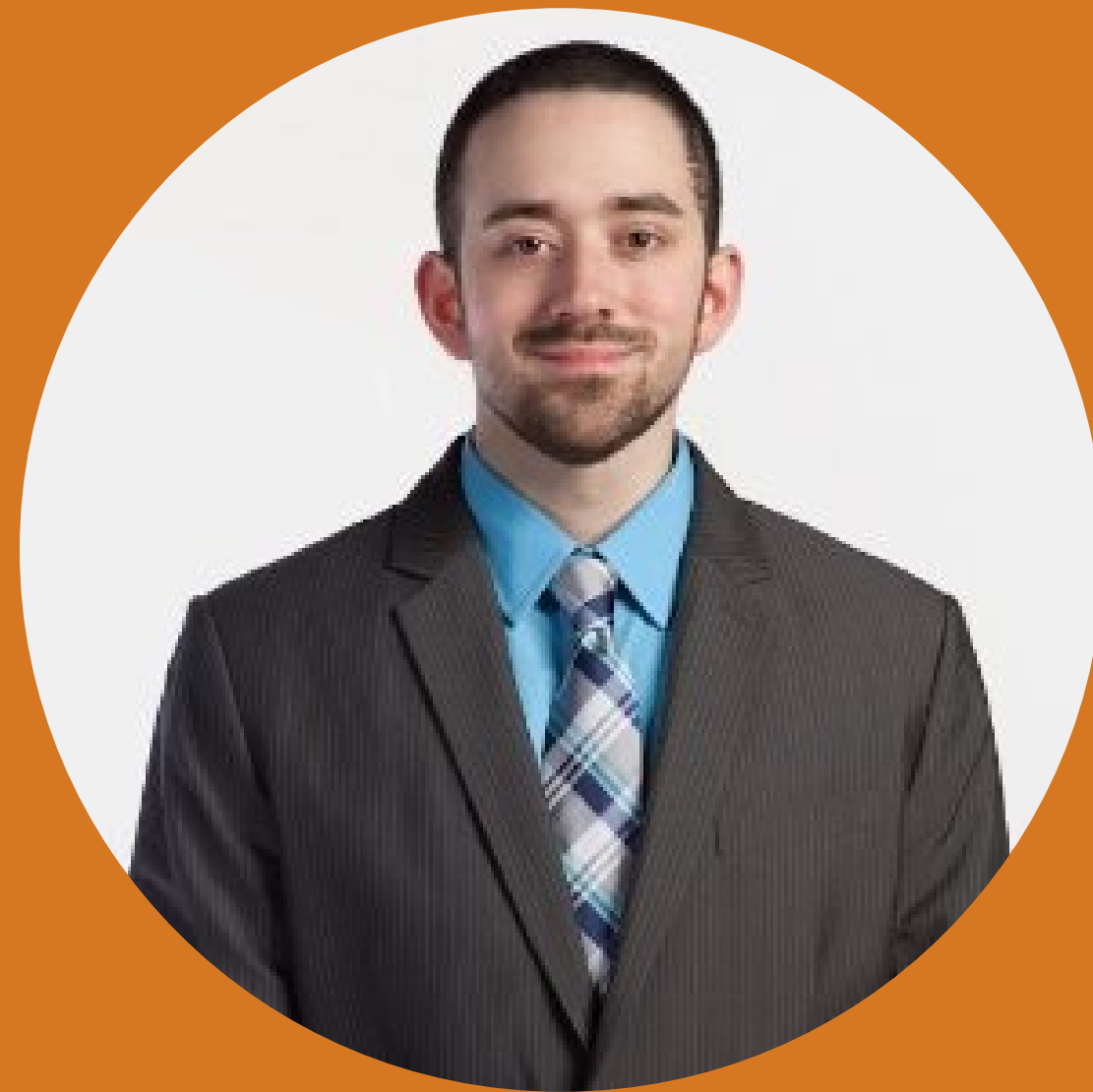
HOW TO SCALE YOUR ASSOCIATION'S MARKETING AND SALES EFFORTS WITH LESS



# Meet Your Presenters



**Madison Filipiak**  
Senior Consultant  
Ready North



**Tony Paille**  
Former Chief Marketing Officer  
AIIM



# Table of Contents

**01**

Top Challenges for  
Associations

**02**

How a CRM Can Save  
You Time & Resources

**03**

How AIM Used  
HubSpot Successfully

**04**

Questions



What are some of the **biggest challenges** your marketing, growth, and member retention departments face today?

---





MARKETING & MEMBER GROWTH'S

# Top Challenges



Limited resources



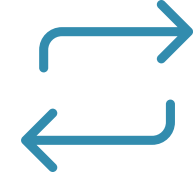


**MARKETING & MEMBER GROWTH'S**

# **Top Challenges**



Limited resources



Changing member needs





**MARKETING & MEMBER GROWTH'S**

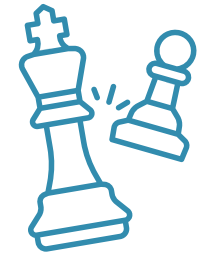
# **Top Challenges**



Limited resources



Changing member needs



Competition for attention



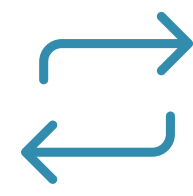


**MARKETING & MEMBER GROWTH'S**

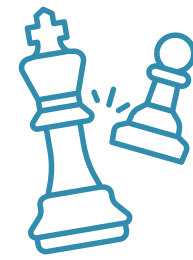
# **Top Challenges**



Limited resources



Changing member needs



Competition for attention



Lack of personalization





# How you can use a comprehensive CRM to save time and resources

---



# HubSpot

**WHAT IS**

## **HubSpot?**

Founded in 2006, HubSpot is a developer and marketer of software products for inbound marketing, sales, and customer service.

The HubSpot CRM consists of five platforms:

- Marketing Hub
- Sales Hub
- Service Hub
- CMS Hub
- Operations Hub





**DEFINE YOUR**

# Target Personas

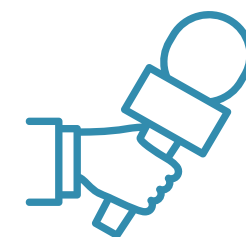
Semi-fictional representations of your ideal user based on real data and educated speculation. They help you understand your users' pain points, goals, preferred communication channels, and messages that resonate with them.



Look at your data



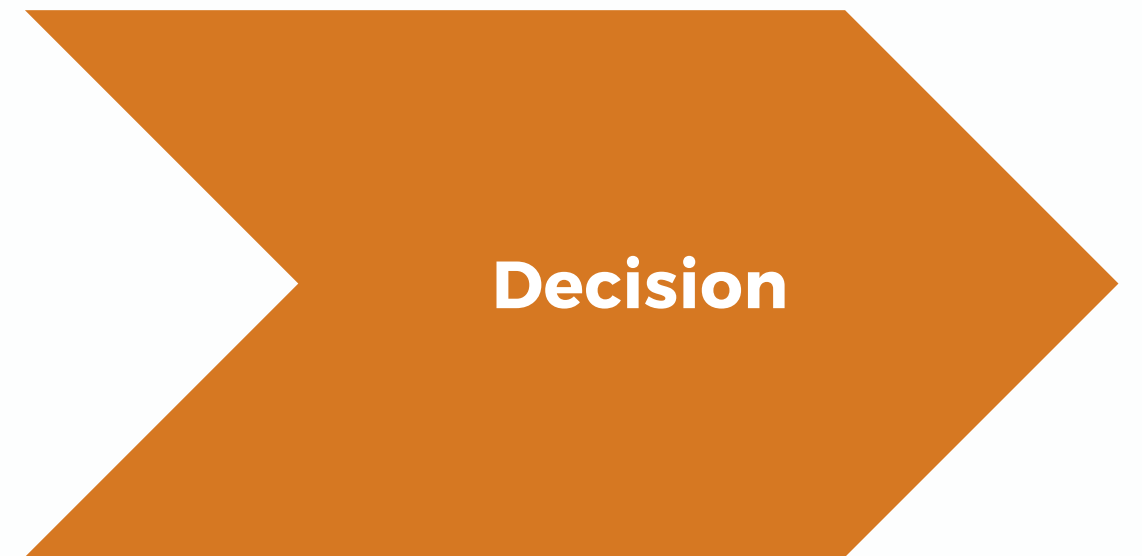
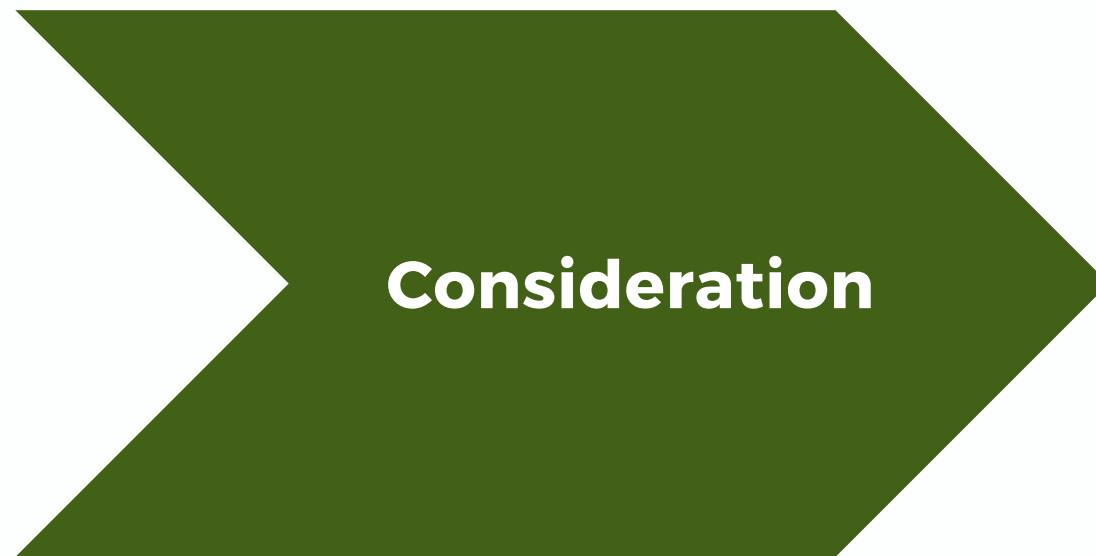
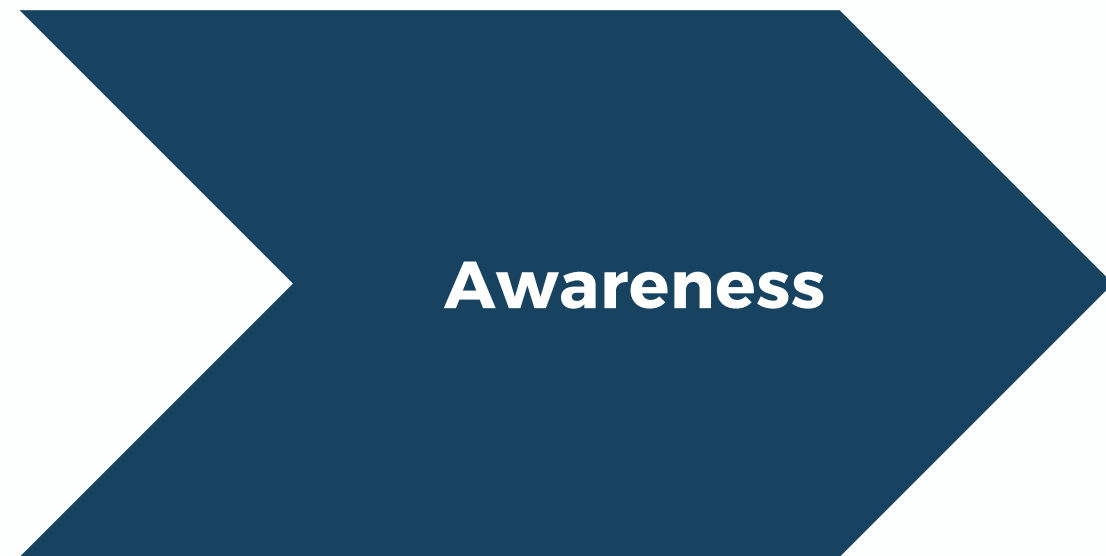
Talk to your sales and customer service teams



Interview your existing users

# Understand

YOUR USER'S JOURNEY



# Understand

## YOUR USER'S JOURNEY



Your user has realized that they have a problem or need. They're just starting to look for a solution.



# Understand

## YOUR USER'S JOURNEY



**Awareness**

Your user has realized that they have a problem or need. They're just starting to look for a solution.



**Consideration**

Your user has clearly defined their problem and has committed to finding a solution.



**Decision**



# Understand

## YOUR USER'S JOURNEY



**Awareness**

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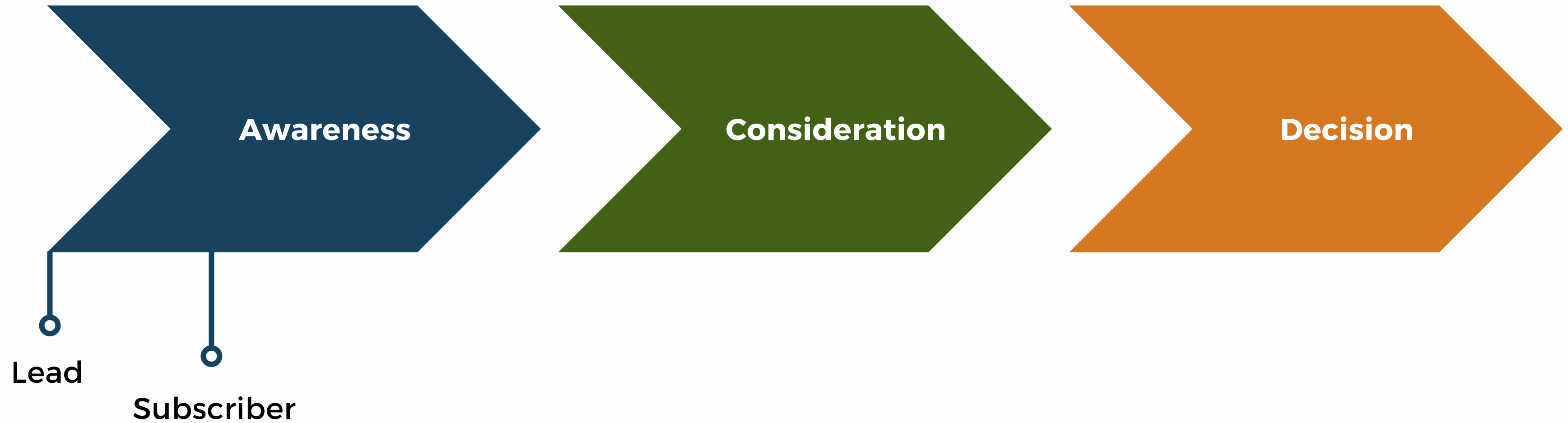
**Decision**

Your user has compiled a list of solutions and is ready to make a final decision.



# Track Users

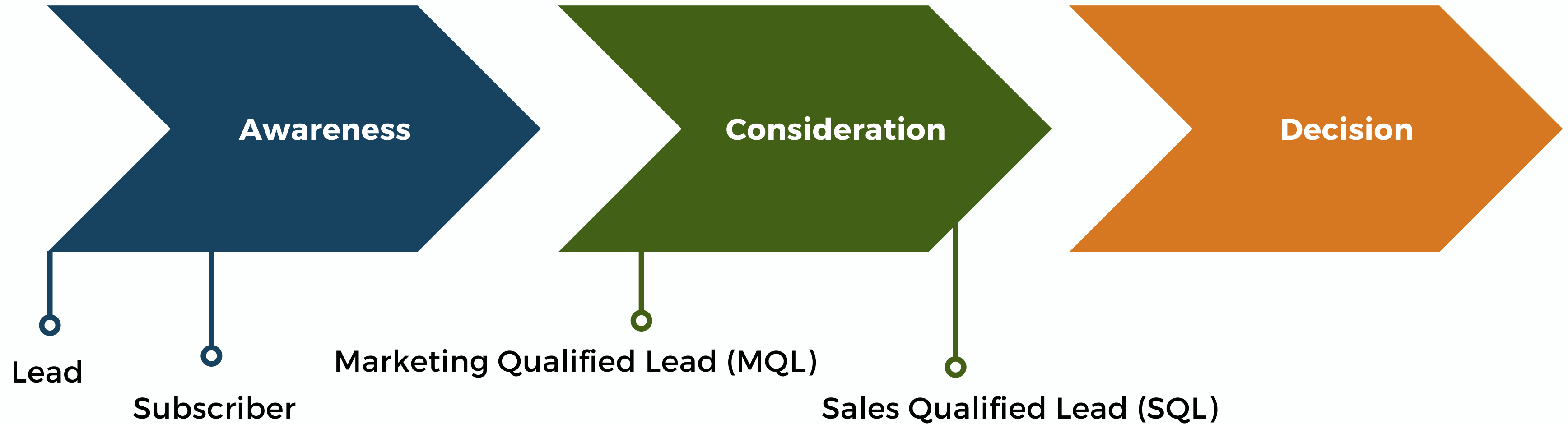
WITH LIFECYCLE STAGES





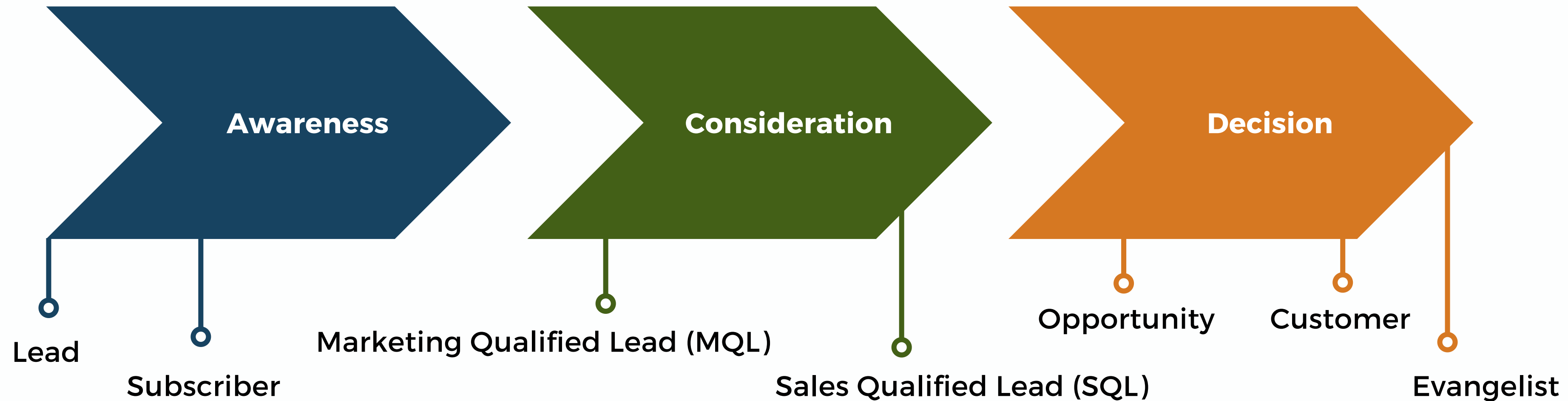
# Track Users

WITH LIFECYCLE STAGES



# Track Users

WITH LIFECYCLE STAGES



## Contacts

Setup

Associations

**Lifecycle Stage**

Record Customization

Track contacts as they move through your marketing and sales processes. [Learn more about lifecycle stages](#)

### Automation

**Sync lifecycle stages**

Update a contact's lifecycle stage whenever their primary company's stage changes. Note: This setting doesn't apply when a company moves backwards in your process.



**Set lifecycle stage when a contact or company is created**

Set a stage for new contacts or companies created in HubSpot

Set lifecycle stage to

Lead



**Set lifecycle stage when a deal is created**

Set a stage for associated contacts and companies when a deal is created

Set lifecycle stage to

Opportunity



**Set lifecycle stage when a deal is won**

Set a stage for associated contacts and companies when a deal is won

Set lifecycle stage to

Customer

## HOW TO AUTOMATE

# Lifecycle Changes

- Adjust default lifecycle stage settings in Settings.



## Contacts

Setup

Associations

Lifecycle Stage

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Customer

## HOW TO AUTOMATE

# Lifecycle Changes

- Adjust default lifecycle stage settings in Settings.
- Set and sync lifecycle stages between objects.



## HOW TO AUTOMATE Lifecycle Changes

### Customize lifecycle stage based on submissions

Choose a lifecycle stage for any records created or updated by submissions to this form. [Learn](#)

#### Set lifecycle stage to

Subscriber

Note: This setting will override the default Lifecycle stage in [Lifecycle stage settings](#), but it will not change the previous lifecycle stage.

- Adjust default lifecycle stage settings in Settings.
- Set and sync lifecycle stages between objects.
- Automatically set lifecycle stage through form settings.



Lifecycle Stage > MQL ✎

Actions Settings Goals Changes

Contact enrollment trigger

Page View

has at least one **Page View** of a URL equal to **https://readynorth.com/blog** at least **3** times

+

1. Set property value **Actions** ▾

Set contact property **Lifecycle stage** to **Marketing Qualified Lead**

## HOW TO AUTOMATE Lifecycle Changes

- Adjust default lifecycle stage settings in Settings.
- Set and sync lifecycle stages between objects.
- Automatically set lifecycle stage through form settings.
- Bulk edit lifecycle stage using a workflow.



A woman with dark curly hair and glasses is sitting at a desk, looking at a laptop. She is wearing a dark green top. The desk has a white keyboard, a small potted plant, and some papers. The background is a blurred office environment with large windows.

**71% of consumers expect companies to deliver personalized interactions. And 76% get frustrated when this doesn't happen.**



# Create Optimized Content

## FOR EACH STAGE OF THE JOURNEY

Combine what you know about your target personas with keyword research to create the right content for each step of their journey.

**Awareness  
(Lead / Subscriber)**

**15  
JUN**

The Power of Personalization: Tips and Tricks for Driving Member Participation and Retention

- Blog posts
- Social media shares
- White papers
- Ebooks
- Videos





# Create Optimized Content

## FOR EACH STAGE OF THE JOURNEY

Combine what you know about your target personas with keyword research to create the right content for each step of their journey.

**Consideration  
(MQLs / SQLs)**

- Comparison guides
- Success stories
- Member testimonials
- Webinars
- Pros and cons articles

**15  
JUN**

The Power of Personalization: Tips and Tricks for Driving Member Participation and Retention



# Create Optimized Content

## FOR EACH STAGE OF THE JOURNEY

Combine what you know about your target personas with keyword research to create the right content for each step of their journey.

**Decision**  
**(Opp, Customer, Evang)**

- Membership renewal
- Member communities
- Forums
- Free trials
- Referral programs

**15  
JUN**

The Power of Personalization: Tips and Tricks for Driving Member Participation and Retention



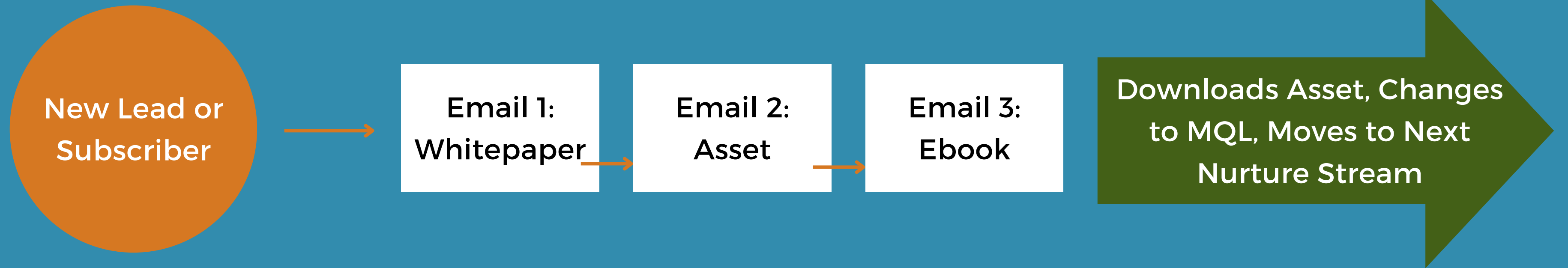
A laptop is shown in the background, displaying a CRM interface with a table of data. Overlaid on the laptop screen is a blue notification bubble with a white envelope icon and a red exclamation mark. A semi-transparent blue banner is positioned in the foreground, containing white text.

If you have a sales pipeline, a longer sales cycle, or you're looking to add value to your prospects, a **good sales nurture series** will significantly increase your conversion rates.



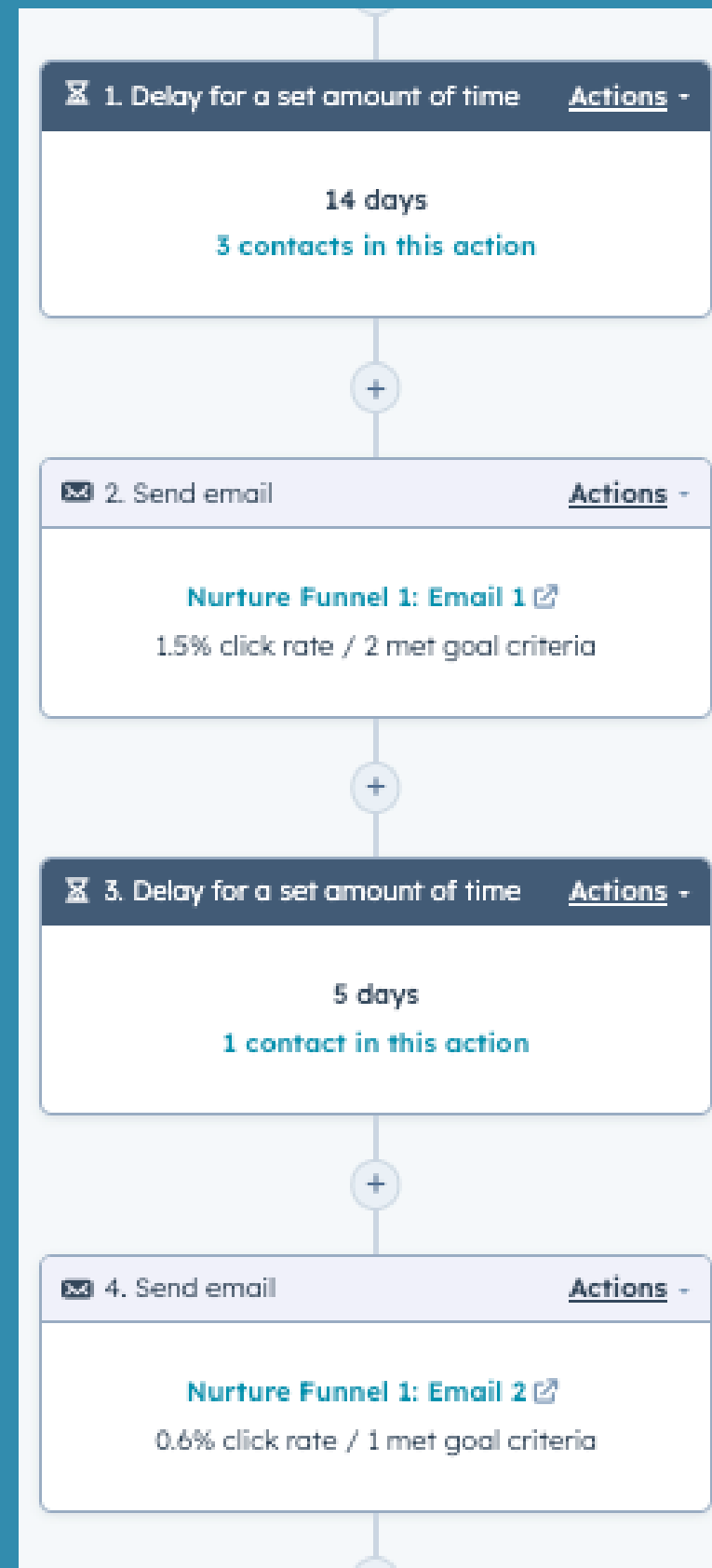
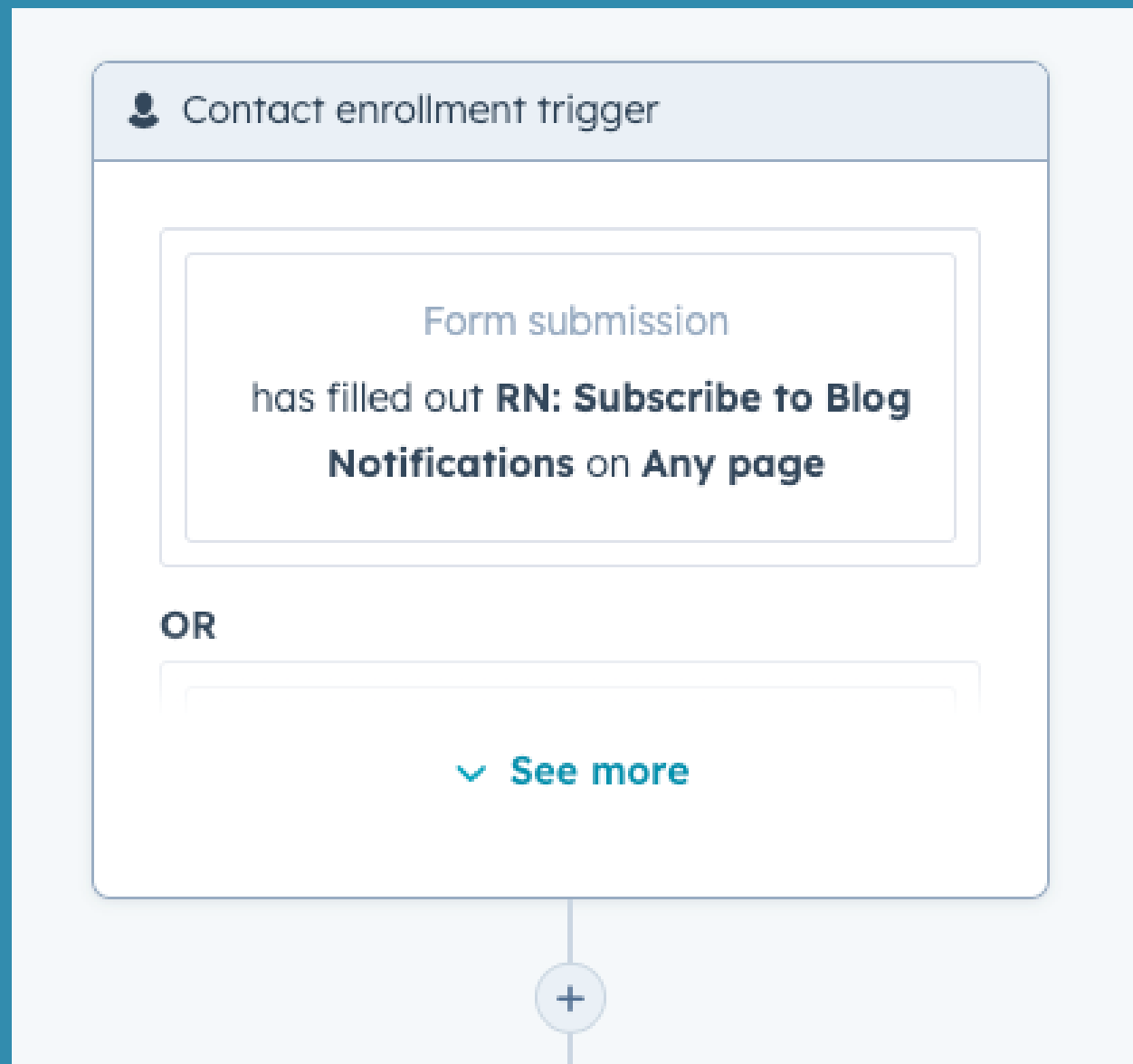
# Nurture Leads

USING WORKFLOWS



# Nurture Leads

## USING WORKFLOWS



### Workflow goal

Measure contact conversions. Contacts will be automatically unenrolled from this workflow when they meet your goal. You can view your goal conversion rate on the [performance](#) page. [Learn more about goals.](#)

Clone Delete

Lifecycle stage is any of Marketing Qualified Lead

AND

OR

### GOAL CONVERSION RATE

13 contacts [View or edit goal](#)

# 1.43%





## PASS QUALIFIED LEADS WITH

# Lead Scoring & Lifecycle Stages

### LEAD SCORING / HUBSPOT SCORE

- A method used to determine the worthiness of a lead.
- Includes implicit factors like webinar attendance or page views.
- Includes explicit factors like job title and company name.





## PASS QUALIFIED LEADS WITH

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- Includes explicit factors like job title and company name.

### COMBINING LIFECYCLE STAGE + LEAD SCORE

- Create lists, filtering contacts by lifecycle stage.
- Sort your list by lead score to prioritize outreach.
- Saves time and money



# IMPROVE 1:1 OUTREACH WITH TEMPLATES

### Edit Template ✕

**Name:** First outreach **Owned by:** Julia Mongeau

**Subject:** How are you? 📁 Select a Folder ▾

Hi Contact: First name ,

I see you're using our free CRM to manage your contact data. Are you interested in learning more about what HubSpot can do to help you grow better?

[Schedule a meeting](#)

Thanks,

Sender: Full Name

**1** **2** **3** **4** **5** **6**

**B** **I** **U** **T** **x** **More ▾** **🔗** **📧** **Personalize ▾** **Insert ▾**

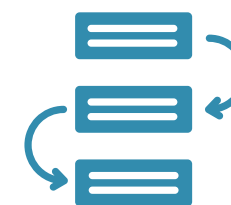
Update existing template Save as new Template Cancel ✔ This email looks fantastic!



Sales email templates



Snippets



Sequences





### New snippet ✕

Snippets allow you to create reusable blocks of text that you can access quickly through keyboard shortcuts. Get started by entering a phrase or line of text that you find yourself typing often, like a greeting or meeting agenda. [Learn more.](#)

**Internal name \***

**Snippet text \***

Would you be interested in setting up time to talk about pricing?

Sans Serif Size A [bold] [italic] [underline] [link] [list] [table] [table]

**B** *I* U [T](#) **Move** **Personalize**

**Shortcut \***

To use a snippet, type the # symbol followed by the snippet shortcut you enter above. The snippet will then appear in the text editor.

**Save snippet** **Cancel**

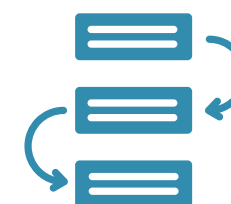
# IMPROVE 1:1 OUTREACH WITH TEMPLATES



Sales email templates



Snippets



Sequences



Back New Sequence ✎ Choose step ✕

Steps Settings Automation

**Sequence summary**

TOTAL STEPS	DAYS TO COMPLETE	AUTOMATION
2	7	100%

1. Automated Email - Day 1  
Following up  
Hey **Contact: First name**, I called you and wrote to you two days ago about some

Delay: 6 business days

2. Automated Email - Day 7  
Re: Following up  
Hey **Contact: First name**, A few days ago, you requested more information about

Automated email  
Automatically send an email for me

Manual email task  
Get a task reminder to send an email

Call task  
Get a task reminder to make a call

General task  
Set a general task reminder

LinkedIn Sales Navigator Connect

InMail task  
Get a task reminder to send an InMail

Connection request task  
Get a task reminder to send a request

Cancel

Sequences > Connect Attempt Sequence

Connect Attempt Sequence Owner: Nicole Wertz Actions Edit Enroll contacts

Enrolled by: All + Enrollment date: MM/DD/YYYY to MM/DD/YYYY

TOTAL ENROLLED	OPEN RATE %	CLICK RATE %	REPLY RATE %	MEETING RATE %	UNSUBSCRIBE RATE	BOUNCE RATE %
1	0%	0%	100%	0%	0%	0%

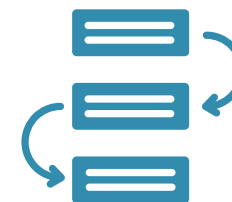
# IMPROVE 1:1 OUTREACH WITH TEMPLATES



Sales email templates



Snippets

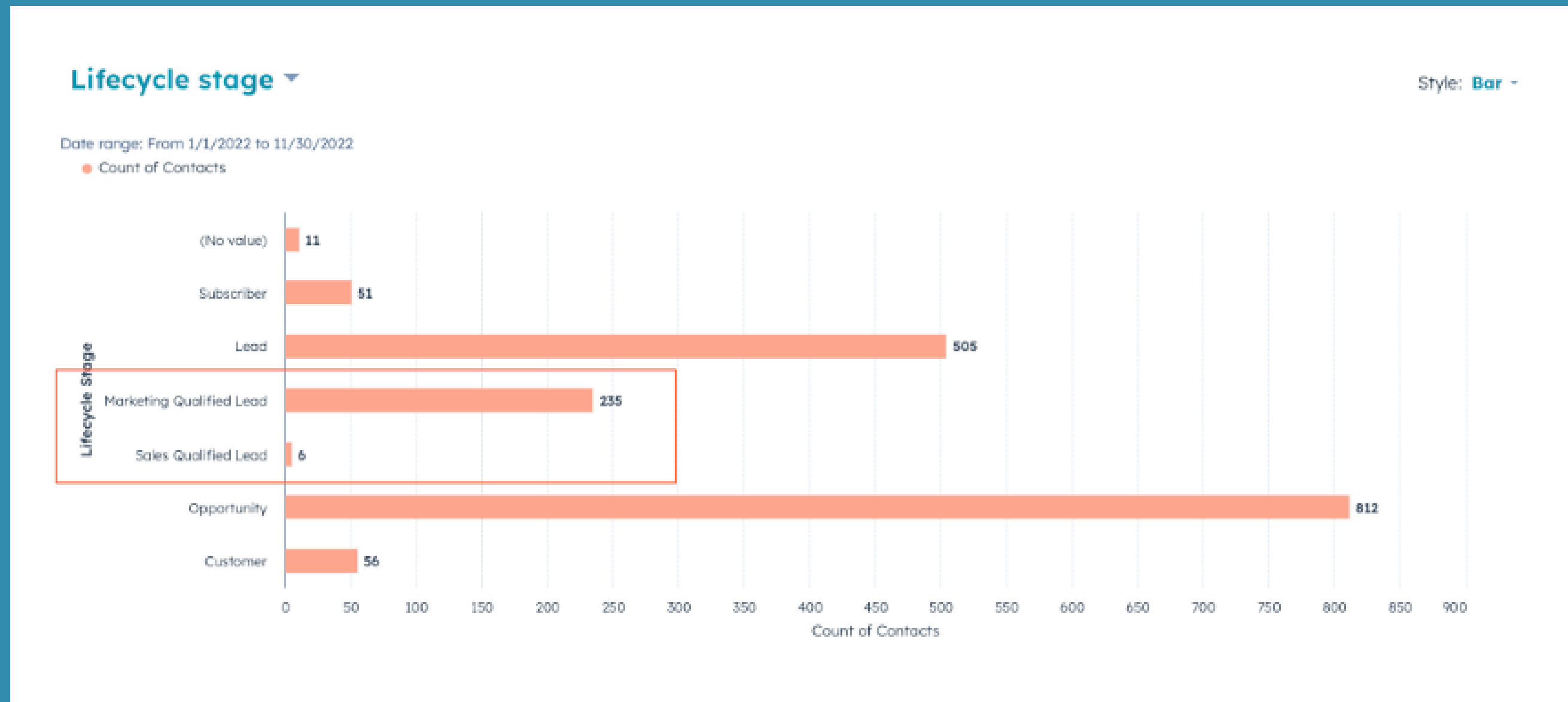


Sequences



# Use Reports

TO IDENTIFY GAPS OR BOTTLENECKS



# Use Reports

TO IDENTIFY GAPS OR BOTTLENECKS

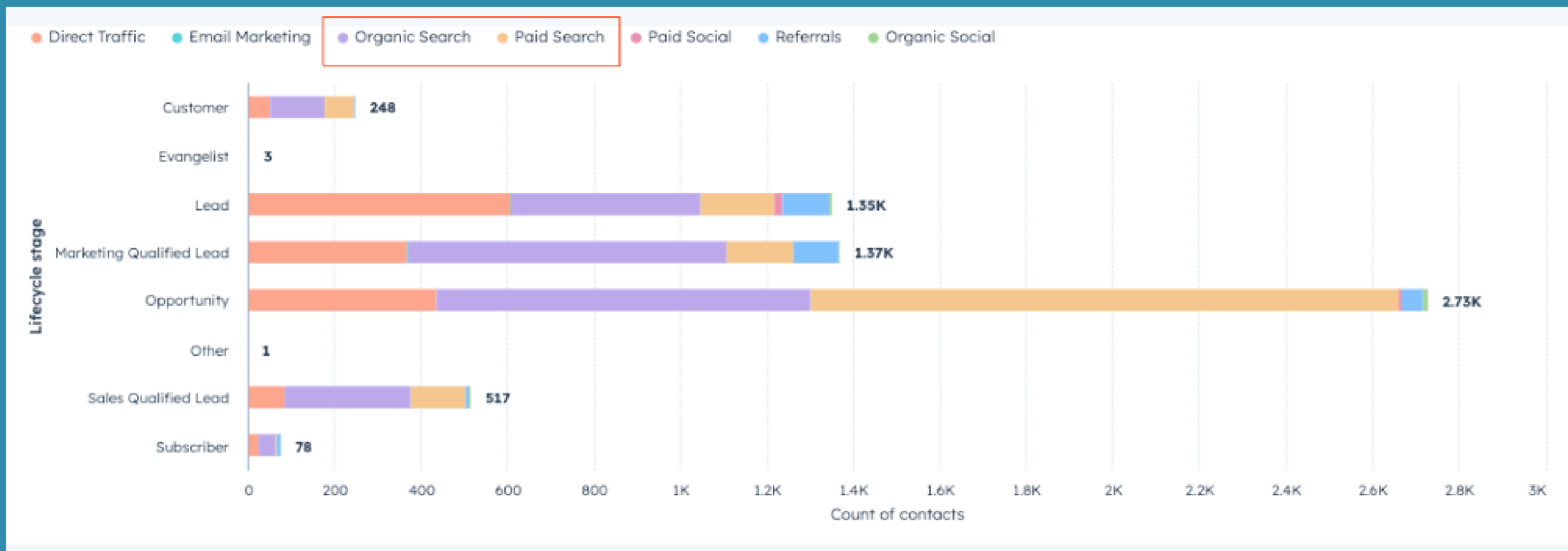


- Do you have an MQL nurture stream set up?
- Are there ample opportunities for someone to contact your team or become a member/sponsor?
- What does your marketing to sales handoff look like?
- How busy is your sales/membership team?



# Use Reports

## TO PLAN MARKETING INITIATIVES





How the Association for Intelligent Information  
Management Used HubSpot to Save Time & Resources



# Create Content Across the Entire Buyer's Journey



1. Call-to-Action
2. Landing Page
3. Thank You Page



1. Call-to-Action
2. Landing Page
3. Thank You Page

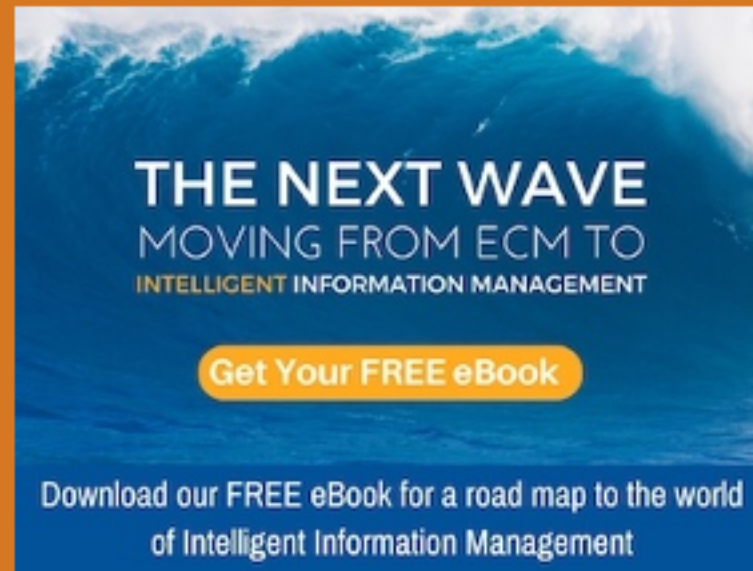


1. Call-to-Action
2. Landing Page
3. Thank You Page



# The Conversion Process

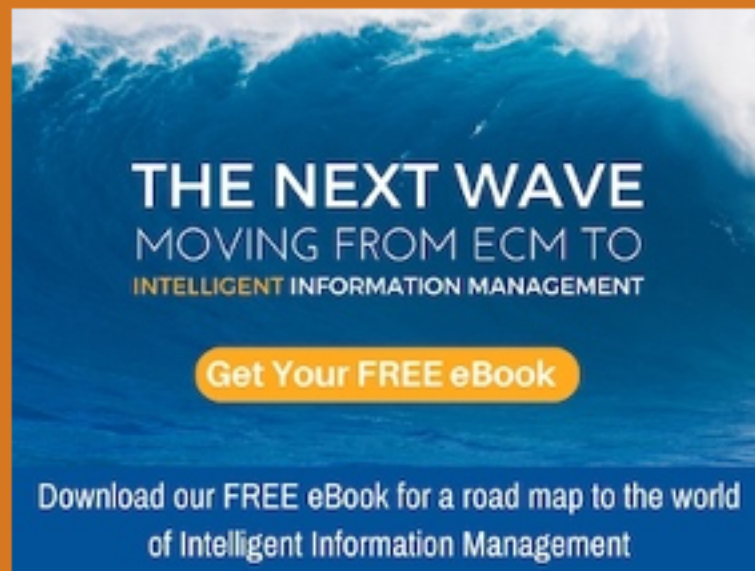
## Call-to-Action





# The Conversion Process

Call-to-Action



Landing Page

**aiim**

## Is ECM Really Dead? We Think It's a Bit More Complicated

A Free eBook from AIIM

**aiim eBook**  
Intelligent Information Management

### THE NEXT WAVE:

Moving from ECM to Intelligent Information Management

by John Mancini  
Chief Evangelist, AIIM

The past 12 months have certainly been crazy ones for content management. In December, Gartner put this fitting caption on the year:

Gartner: "ECM is now dead (yes, it's an ex-market name), at least in how Gartner defines the market. It's been replaced by the term Content Services."

So is "Content Services" really all there is? Is "ECM" really dead? The term might be straining a bit, but the idea isn't. We think the conversation is a bit more complicated (and to be fair, so does Gartner).

So what comes next? Find out more in our new eBook, **THE NEXT WAVE: Moving from ECM to Intelligent Information Management**.

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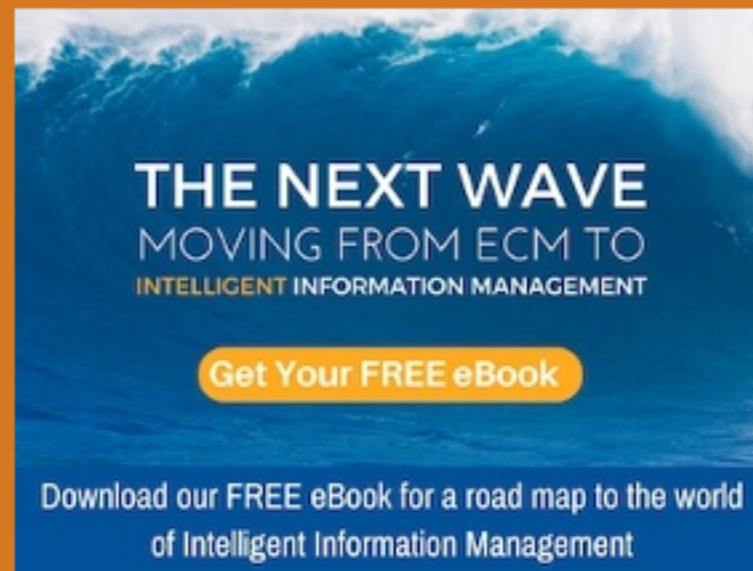
State/Region

MS



# The Conversion Process

Call-to-Action



Landing Page

A screenshot of a landing page for an eBook. The header features the AIIM logo and the title "Is ECM Really Dead? We Think It's a Bit More Complicated" with the subtitle "A Free eBook from AIIM". On the left is a thumbnail of the eBook cover. To the right of the thumbnail is a text block discussing the state of ECM. Below the text is a registration form with fields for First Name, Last Name, Title, Email, Company Name, AIIM, State/Region, and ZIP. A "Download Now" button is at the bottom of the form. The footer contains the copyright notice "© 2016 AIIM".

Thank You Page

A screenshot of a thank you page. The header includes the AIIM logo, navigation links (Topics, Education, Events, Resources, Blog, Community, About, Join AIIM), and buttons for "Become a Member" and "Login". The main content area says "Hi there, happy reading!" followed by a "Download Your eBook" button. Below this is a section titled "Want to put these findings into practice? Take an AIIM Training Course!" which describes an Enterprise Content Management training course and lists bullet points: "Identify ways to better capture, analyze, engage, automate, and govern enterprise content", "Learn how to develop necessary content taxonomies, metadata, and security models", and "Define your business and system requirements for enterprise content management". A yellow button says "Yes, show me more about AIIM's ECM course". The footer includes the text "Learn what you want, when you want." and the copyright notice "© 2016 AIIM".





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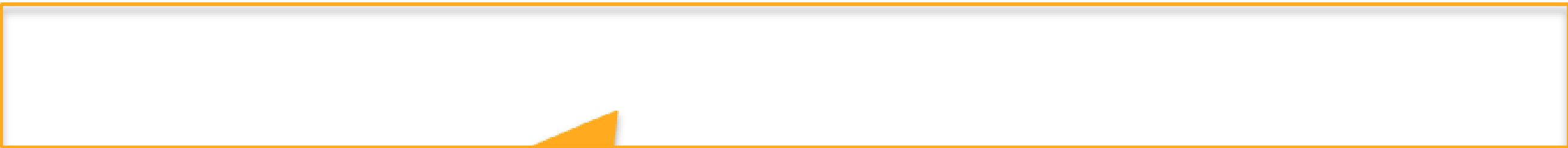
Last Name\*

Email\*

Company Name\*

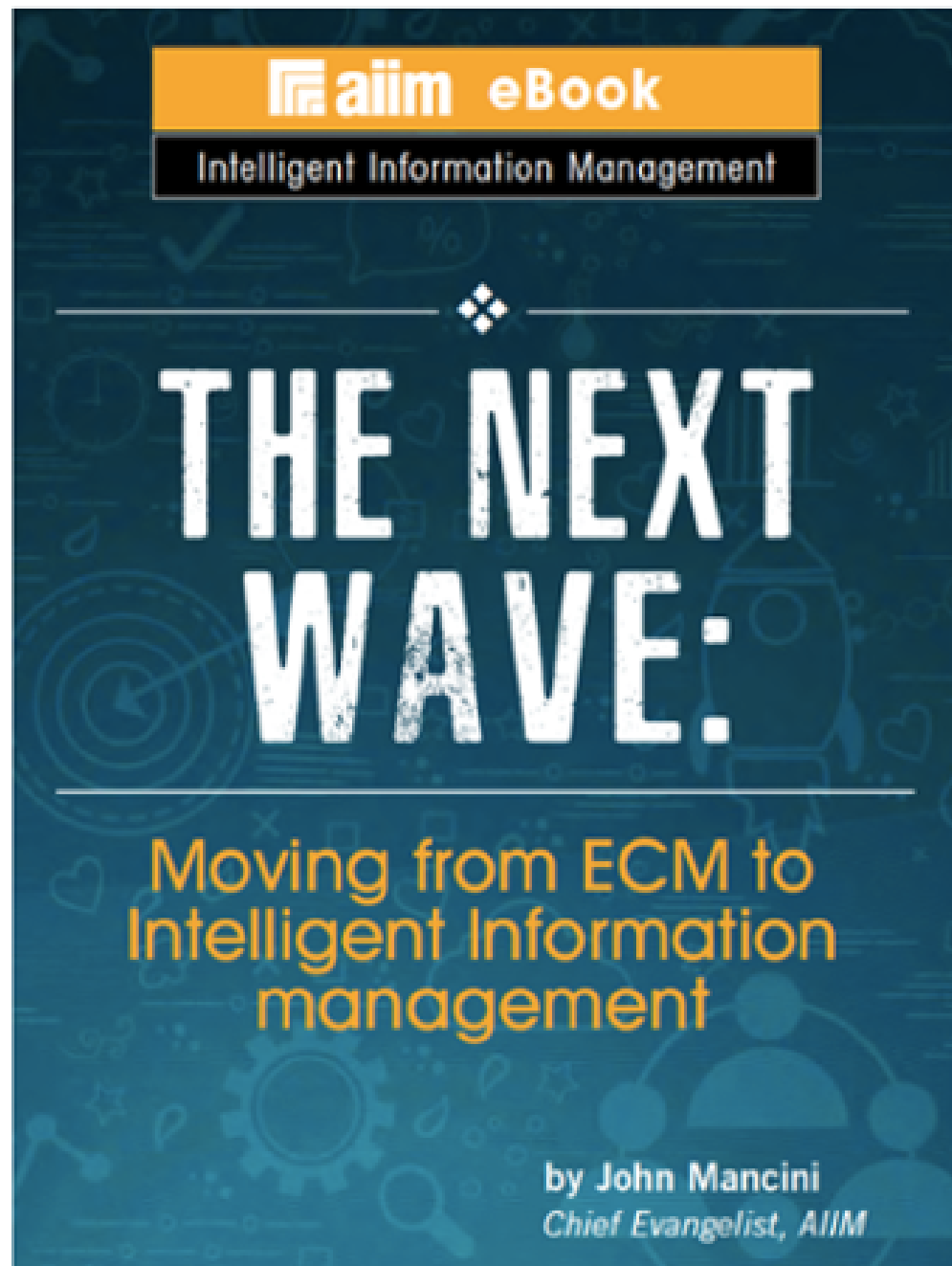
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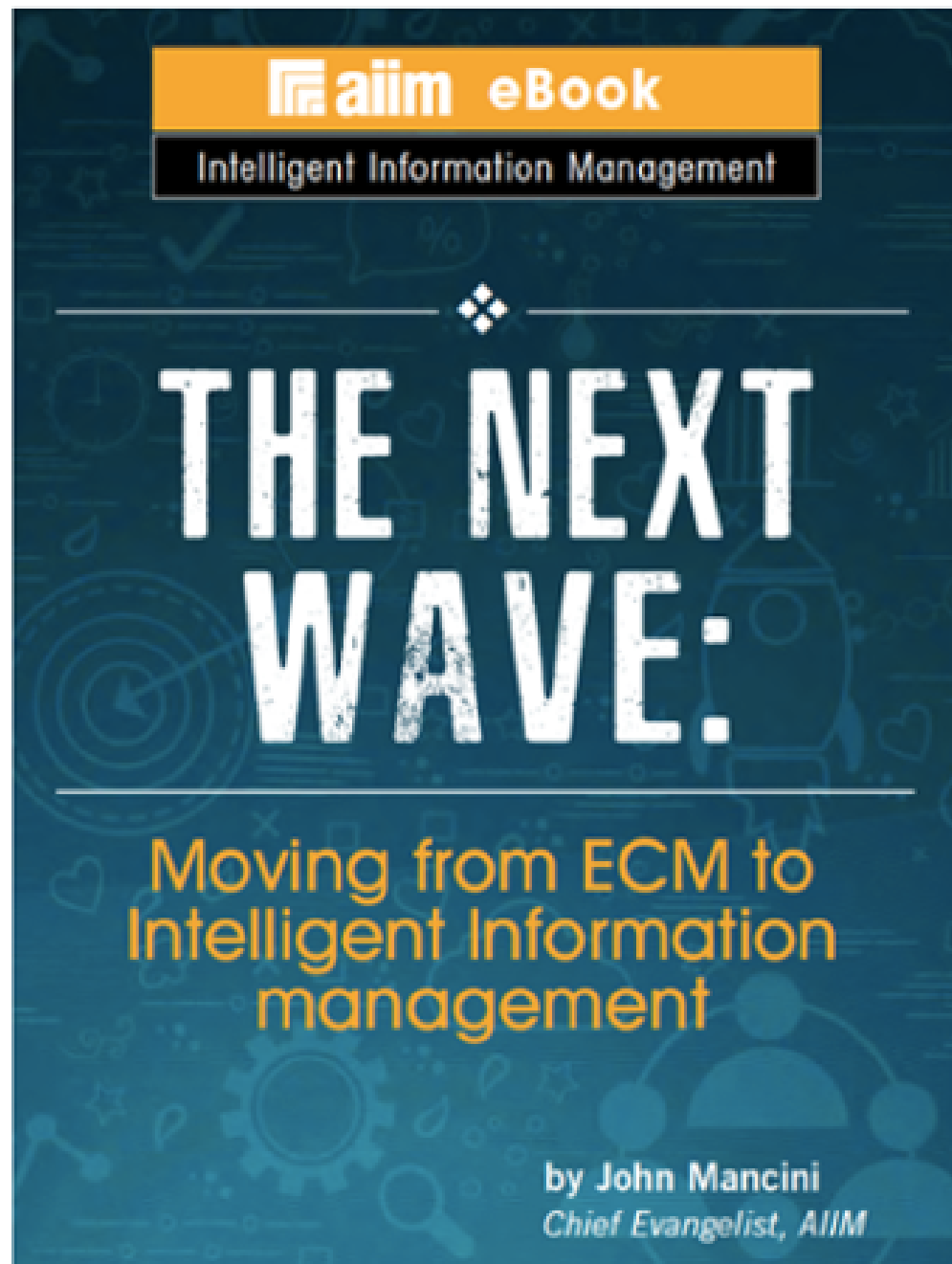
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Our Enterprise Content Management training course provides essential skills when you're short on time and short on budget.

Enroll today for just \$595. You'll get six months of unlimited access to all of the ECM practitioner/specialist online course modules to learn at your own pace:

- Identify ways to better capture, analyze, engage, automate, and govern enterprise content
- Learn how to develop necessary content taxonomies, metadata, and security models
- Define your business and system requirements for enterprise content management

[Yes, show me more about AIIM's ECM course](#)

*Learn what you want, when you want.*





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- Define your business and system requirements for enterprise content management

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### **Want to put these findings into practice? Take an AIIM Training Course!**

Our Enterprise Content Management training course provides essential skills when you're short on time and short on budget.

Enroll today for just \$595. You'll get six months of unlimited access to all of the ECM practitioner/specialist online course modules to learn at your own pace:

- Identify ways to better capture, analyze, engage, automate, and govern enterprise content
- Learn how to develop necessary content taxonomies, metadata, and security models
- Define your business and system requirements for enterprise content management

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 **aiim eBook**

Intelligent Information Management

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# THE NEXT WAVE:

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Moving from ECM to  
Intelligent Information  
Management

by **John Mancini**  
*Chief Evangelist, AIIM*

**4,511** downloads

**868** new contacts

**29** new customers



Idea generation  
Research  
Organizing data



Designing or writing the asset



Designing or writing the asset



# We Start With an eBook

eBook





# We Start With an eBook

eBook

Landing Page



The image is a screenshot of a landing page for the eBook. It features the AIIM logo at the top left. The main heading is "Free Report: The Impact of SharePoint - 2016" with the subtitle "A Summary of AIIM's Industry Watch". Below this, there is a paragraph of introductory text: "The SharePoint platform has evolved to become a digital workspace and universal interface." To the right of this text is a registration form with fields for "First Name\*", "Last Name\*", "Title", "Email\*", "Company Name\*", "AIIM", and "Postal Code". A "Download Now" button is located at the bottom of the form. Below the introductory text, there is a small thumbnail of the eBook cover and a paragraph of text: "SharePoint is being used in support of collaborative efforts of all...". Further down, there is a list of key findings and a closing statement: "Most importantly, you'll get the information you need to help your organization plan a long-term SharePoint strategy."



# We Start With an eBook

eBook

Landing Page

Thank You Page

The landing page features the AIIM logo and the title 'Free Report: The Impact of SharePoint - 2016'. It includes a summary of the report's findings and a registration form with fields for First Name, Last Name, Title, Email, Company Name, and Postal Code, along with a 'Download Now' button.

**Free Report: The Impact of SharePoint - 2016**  
A Summary of AIIM's Industry Watch

The SharePoint platform has evolved to become a digital workspace and universal interface.

SharePoint is being used in support of collaborative efforts of all The Impact of SharePoint 2016 its including co-authoring of documents, information sharing, and an integration point with all enterprise information sources.

In this study, we find that there is a slight increase over the last year of SharePoint use in an Enterprise Content Management (ECM) and Document Management (DM) role with 28% of respondents citing it is their only (10%) or main (18%) ECM/DM system.

However, can SharePoint ultimately be a platform upon which ECM, DM, RM, and collaboration can be built, implemented and expanded?

In this executive summary, we've compiled our key findings, including:

- SharePoint adoption opportunities and challenges
- How others in our community are utilizing SharePoint
- Information to help you plan for your organization's future

Most importantly, you'll get the information you need to help your organization plan a long-term SharePoint strategy.

The thank you page features the AIIM logo and a navigation menu. It includes a personalized greeting, a 'Download Your eBook' button, and a section for training courses with a 'Yes, show me more about AIIM's ECM course' button.

Hi there, happy reading!

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**Want to put these findings into practice? Take an AIIM Training Course!**

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[Yes, show me more about AIIM's ECM course](#)

Learn what you want, when you want.

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# We Start With an eBook

eBook

Landing Page

Thank You Page



The screenshot shows the landing page for the eBook. At the top left is the AIIM logo. The main heading is "Free Report: The Impact of SharePoint - 2016" with a subtitle "A Summary of AIIM's Industry Watch". Below this is a paragraph: "The SharePoint platform has evolved to become a digital workspace and universal interface." To the right is a registration form with fields for "First Name\*", "Last Name\*", "Email\*", "Company Name\*", "AIIM", and "Postal Code", followed by a "Download Now" button. On the left side of the page, there is a small thumbnail of the eBook cover and a list of key findings, including "SharePoint adoption opportunities and challenges" and "How others in our community are utilizing SharePoint".

The screenshot shows the thank you page. At the top right, there are links for "Become a Member" and "Login", along with a search bar. The main navigation menu includes "Topics", "Education", "Events", "Resources", "Blog", "Community", "About", and "Join AIIM". A central message says "Hi there, happy reading!" with a "Download Your eBook" button. Below this is a highlighted section with a yellow border. It starts with the heading "Want to put these findings into practice? Take an AIIM Training Course!". The text describes an "Enterprise Content Management training course" and lists three bullet points: "Identify ways to better capture, analyze, engage, automate, and govern enterprise content", "Learn how to develop necessary content taxonomies, metadata, and security models", and "Define your business and system requirements for enterprise content management". At the bottom of this section is a button that says "Yes, show me more about AIIM's ECM course".

Next Step



# Next, We Wrote a Blog Post

Article

Call-to-Action

The screenshot shows the top of an AIIM blog post. The header includes the AIIM logo, navigation links (Topics, Education, Events, Resources, Blog, Community, About, Join AIIM), and buttons for 'Become a Member' and 'Login'. The article title is 'The Problem with SharePoint - Technology or People?' dated Oct 21, 2016. Below the title is a social sharing bar. The main image shows a man in a suit looking stressed at a computer. To the right is an 'About AIIM' section with a description of the organization's mission. Below that is a 'Subscribe to Email Updates' form with an email input field containing 'apal@aiim.org' and a 'Subscribe' button. At the bottom, there is a 'Recent Posts' section with a link to 'It's like Deja Vu all over again -- a Records'.

This screenshot shows a specific section of the blog post titled 'What can you do?'. It contains three paragraphs of text. The first paragraph discusses the importance of understanding an organization's current state relative to others. The second paragraph advises consulting with senior management on SharePoint's role in organizational strategy. The third paragraph emphasizes the need for technology training and generic training in content and records management. At the bottom of this section is a blue button labeled 'Download the Report'.



# Then, We Designed an Infographic

## Infographic



## Landing Page

The landing page features the AIIM logo and the title "The Impact of SharePoint - 2016: An AIIM Infographic". It includes a summary of the research findings, a "Download Now" button, and a contact form with fields for First Name, Last Name, Title, Email, Company Name, AIIM, and Postal Code.

## Thank You Page

The thank you page features the AIIM logo, navigation links, and a personalized message: "Hi Anthony, we hope you find this infographic useful." It includes a "Download Your Infographic" button, a "Free Report: The Impact of SharePoint 2016" section with a summary of findings, and a contact form with fields for First Name, Last Name, Title, Email, Company Name, AIIM, State/Region, and MD.

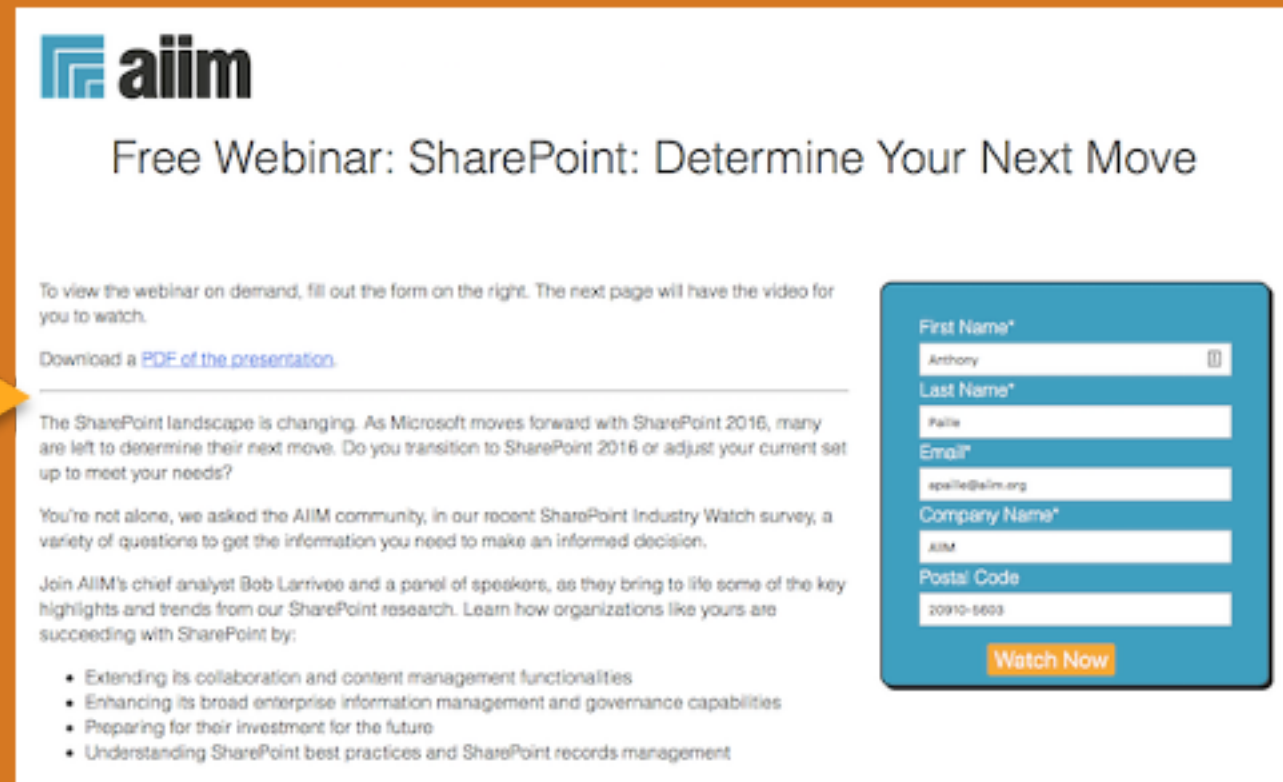


# How About a Webinar?

Webinar



Landing Page



**aiim**

## Free Webinar: SharePoint: Determine Your Next Move

To view the webinar on demand, fill out the form on the right. The next page will have the video for you to watch.

Download a [PDF of the presentation](#).

The SharePoint landscape is changing. As Microsoft moves forward with SharePoint 2016, many are left to determine their next move. Do you transition to SharePoint 2016 or adjust your current set up to meet your needs?

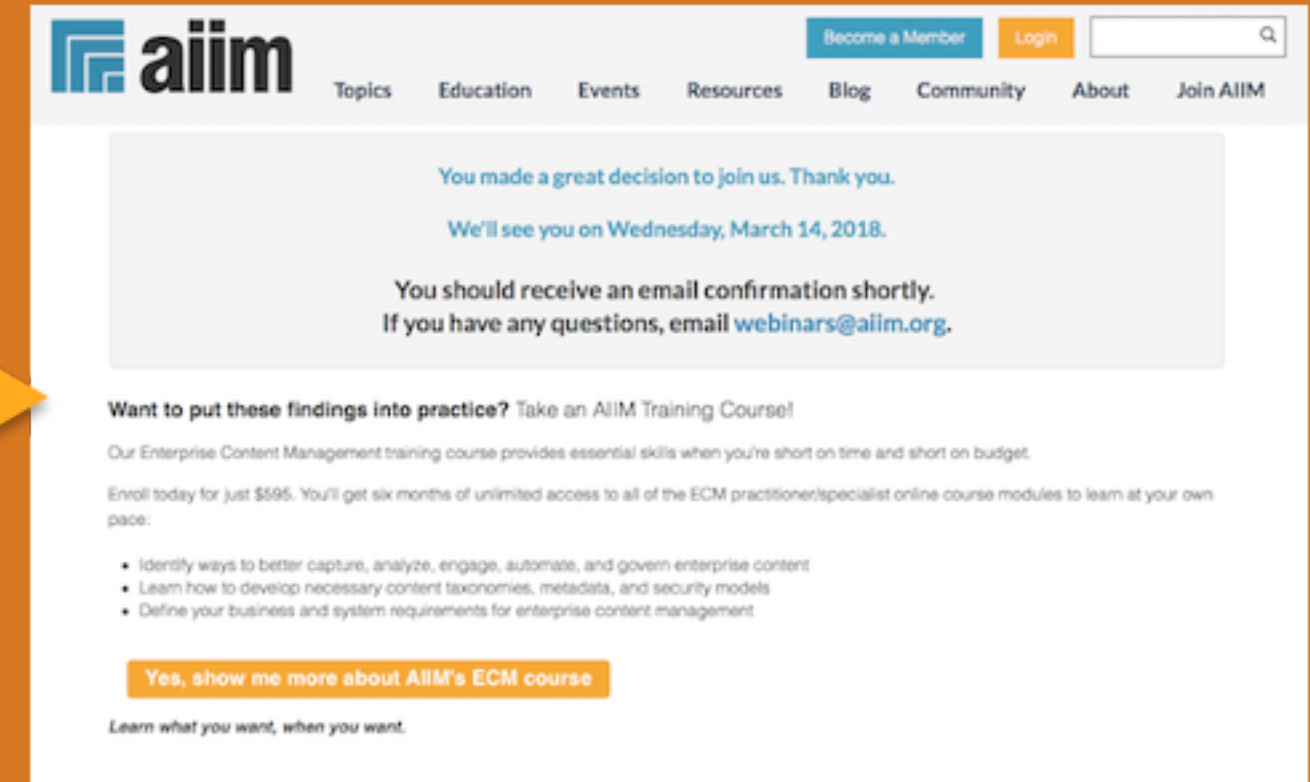
You're not alone, we asked the AIIM community, in our recent SharePoint Industry Watch survey, a variety of questions to get the information you need to make an informed decision.

Join AIIM's chief analyst Bob Larrivee and a panel of speakers, as they bring to life some of the key highlights and trends from our SharePoint research. Learn how organizations like yours are succeeding with SharePoint by:

- Extending its collaboration and content management functionalities
- Enhancing its broad enterprise information management and governance capabilities
- Preparing for their investment for the future
- Understanding SharePoint best practices and SharePoint records management

Registration form fields: First Name\* (Anthony), Last Name\*, Title, Email\* (apelle@aiim.org), Company Name\* (AIIM), Postal Code (20910-1603). [Watch Now](#)

Thank You Page



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You made a great decision to join us. Thank you.  
We'll see you on Wednesday, March 14, 2018.

You should receive an email confirmation shortly.  
If you have any questions, email [webinars@aiim.org](mailto:webinars@aiim.org).

**Want to put these findings into practice? Take an AIIM Training Course!**

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Learn what you want, when you want.



# Finally, a YouTube Video



The video player shows a woman with long dark hair, wearing a grey tank top, sitting at a table and looking intently at a chessboard. She has her hand to her forehead, suggesting deep thought. The chessboard is filled with various pieces, including pawns, knights, and kings. The video player interface includes a play button, a progress bar showing 0:01 / 58:56, and a date of August 17, 2016. The video title is "[Webinar Replay] SharePoint 2016: Determine Your Next Move" and it has 80 views. The player also shows 1 like, 0 comments, and a share button.

**SharePoint:**  
Determine Your Next Move

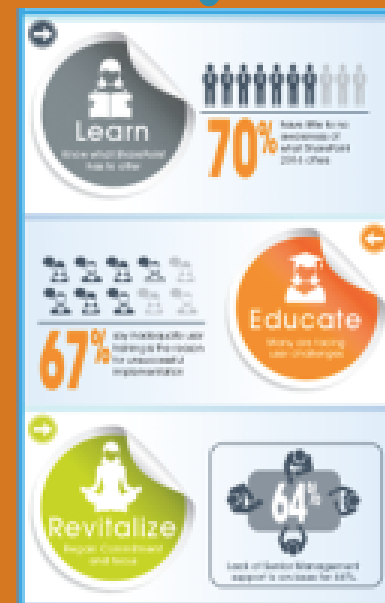
0:01 / 58:56 August 17, 2016

[Webinar Replay] SharePoint 2016: Determine Your Next Move

80 views

1 0 SHARE







# The Results

## Blog Post

782 Views

## YouTube Video

116 views

## eBook

1,062 downloads

239 new contacts

6 customers

## Webinar

591 attendees

167 new contacts

8 customers

## Infographic

371 downloads

66 new contacts

4 customers

## Totals

2,024 engagements

472 new contacts

18 customers

# What Does That Mean in Dollars?

\$2,706.03 Average Customer Lifetime Value + 18 Customers = \$48,708.54



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