



The Definitive Guide to Social Engagement in HubSpot

How to Enrich your Lead Scoring, Nurturing, Attribution, and Segmentation with Oktopost

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CHAPTER
01

Introduction

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01

Scope of Series

The B2B buyer journey has changed. Customers have adopted a level of self-sufficiency and proactiveness that no longer aligns with the conventional sales model.

Today, more than ever before, social media plays a significant role in shaping your prospect and customer experience, with more than half (53%) of B2B buyers^[1] turning to networks like Facebook, Twitter, and LinkedIn to make key purchasing decisions.

In a world where every lead is active on social, what are you doing to track this activity and – ultimately – leverage it for better engagement? This definitive guide seeks to answer this question. Designed for both novice and seasonal HubSpot users, this guide lays the foundation for identifying the current blind spots in your existing HubSpot campaigns and integrating social engagement data to better manage, target, and convert leads.

Chapter 1: Introduction

Chapter 2: Lead Nurturing with Social Engagement

Chapter 3: Lead Scoring with Social Engagement

Chapter 4: Lead Attribution with Social Engagement

Chapter 5: Lead Segmentation with Social Engagement

Before reading on, the following section provides a broad introduction to marketing automation platforms and their core capabilities. Moreover, it helps you visualize the dataset that currently exists within HubSpot while presenting social engagement as a missing entity. It then goes on to surface the gap between the “buyer journey that HubSpot sees” and “what really happens”.

[1] Demand Gen Report: The 2016 B2B Buyer's Survey Report

Overview of Marketing Automation

What is Marketing Automation?

Marketing automation allows companies to streamline, automate, and measure marketing tasks and workflows to increase operational efficiency and grow revenue faster. It essentially acts as a central marketing database, engagement marketing engine, and an analytics platform. Nowadays, Marketing Automation technology is essential to scale your activities, especially with the increasing number of channels marketers are required to manage.

67% of marketing leaders currently use a Marketing Automation Platform.

Over the next two years, an additional **21%** of Marketing Leaders plan to use a Marketing Automation Platform.^[2]

Why Use Marketing Automation?

There are several reasons to consider using a marketing automation software. **The average decision-maker (or buyer) receives 3,000 messages per day** – that's a lot of companies vying for one person's attention.

Buyers form opinions and draw conclusions long before they interact with your company. According to a recent CEB research, **the average B2B buyer is 60% of the way through a purchase process prior to reaching a salesperson.**^[3] By the time customers speak to your company, they have already established their needs, prioritized their solutions, and set benchmarked pricing.

To remain competitive in this new buying cycle, you need to have a strong online presence that engages buyers at every stage of the sales funnel. Marketing automation helps you cut through the noise while building relationships with buyers over time.

[2] Salesforce: State of Marketing Report

[3] CEB Research: Two Numbers You Should Care About

What Are the Key Marketing Automation Capabilities?

Looking at a B2B marketing technology stack, marketing automation is the main component that allows you to perform three powerful programs: lead nurturing, lead scoring, and lead attribution.

Lead Nurturing

It's one thing to attract potential buyers, but quite another to keep them engaged and interested in your company throughout the buyer journey. In fact, 50% of leads are qualified but not yet ready to buy, making it pertinent to have a disciplined process for building relationships with leads over time.^[4]

This is where lead nurturing comes in. Once you have qualified leads in your database, the next step is to educate and engage them with highly relevant content across multiple channels, in turn, driving them further down the sales funnel.



Companies that excel at lead nurturing generate:

50% more sales ready leads
at a 33% lower cost ^[4]

Some basic examples of lead nurturing includes:



Email: Create email cadences that keep your product or service top-of-mind, including thought leadership pieces, case studies, webinars, etc.



Retargeting: Implement personalized retargeting through ads that focus on a buyer's persona, organization, and vertical.



Website: Customize a buyer's web experience in real-time by presenting the most relevant content based on their intent, behavior, and profile.

[4] Gleanster: Lead Nurturing Report



Lead Scoring

Beyond lead nurturing, marketing automation includes lead scoring capabilities, which help marketers make sure they only pass sales leads that have a strong chance of becoming customers. In HubSpot, lead scoring is generally based on three basic factors:

- ✓ **Demographics and Firmographics:** Do leads seem like a good customer-fit based on their location, company size, and industry? The closer a prospect is to your ideal customer profile, the more likely they are to close, and the higher the score they're assigned.
- ✓ **CRM Data:** You can use interactions logged in your HubSpot CRM such as tracked email clicks, meetings booked, and calls made to determine the likelihood of prospects closing as customers within 90 days.
- ✓ **Marketing Data:** If you have the HubSpot Marketing Hub account, you can also use relevant web analytics, email interactions, and form submission events to determine the close probability of your contacts.

Lead Attribution

A lead attribution model assigns sales or conversion credit to a specific touch point in the buyer journey. The more insight you have into the effect of marketing campaigns on sales outcome, the better you can use that information in future campaigns. Marketers usually adopt one of three main models to measure campaign success:

- 1. First-Touch Attribution:** The first interaction taken by the lead receives 100% of the credit.
- 2. Last-Touch Attribution:** The last interaction taken by the lead receives 100% of the credit.
- 3. Multi-Touch Attribution:** All interactions in the conversion path share equal credit leading up to the conversion.

Allocating revenue spend over multiple activities allows you to determine which marketing activities are effective

for the top-of-the-funnel versus the bottom-of-the-funnel. For example, you can determine that trade shows are great for garnering leads, whereas webinars are more effective for pushing leads through the funnel. Without multi-touch attribution, it's difficult to understand this information and your campaigns may not be as successful.



HubSpot Data Before & After Oktopost

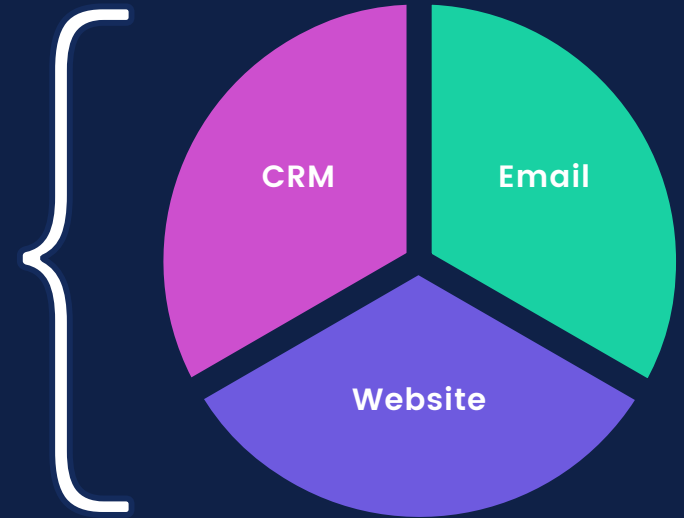
Many of your leads are leaving “digital footprints”. They research their problem online, land on your website, and eventually consume your content. The trail of activity they leave behind is tracked and collected by HubSpot.

More to the point, HubSpot collects lead activity from 3 key data sources: website, email, and CRM. Using this data, marketers can understand audience behavior such as website visits, email clicks, content downloads, and other engagements with your brand – and use it to score, nurture, attribute, and segment leads inside HubSpot.

While this data may seem sufficient to understand the buyer journey; unfortunately, it doesn't give you the whole picture. By the time a lead reaches your site, they've already completed 60% of the research online^[5] – namely, on social media. Failing to track this lead behavior has a twofold impact:

1. You have major blind spots in your scoring, nurturing, and attribution models
2. Your sales team is wasting time communicating with a bunch of unqualified leads

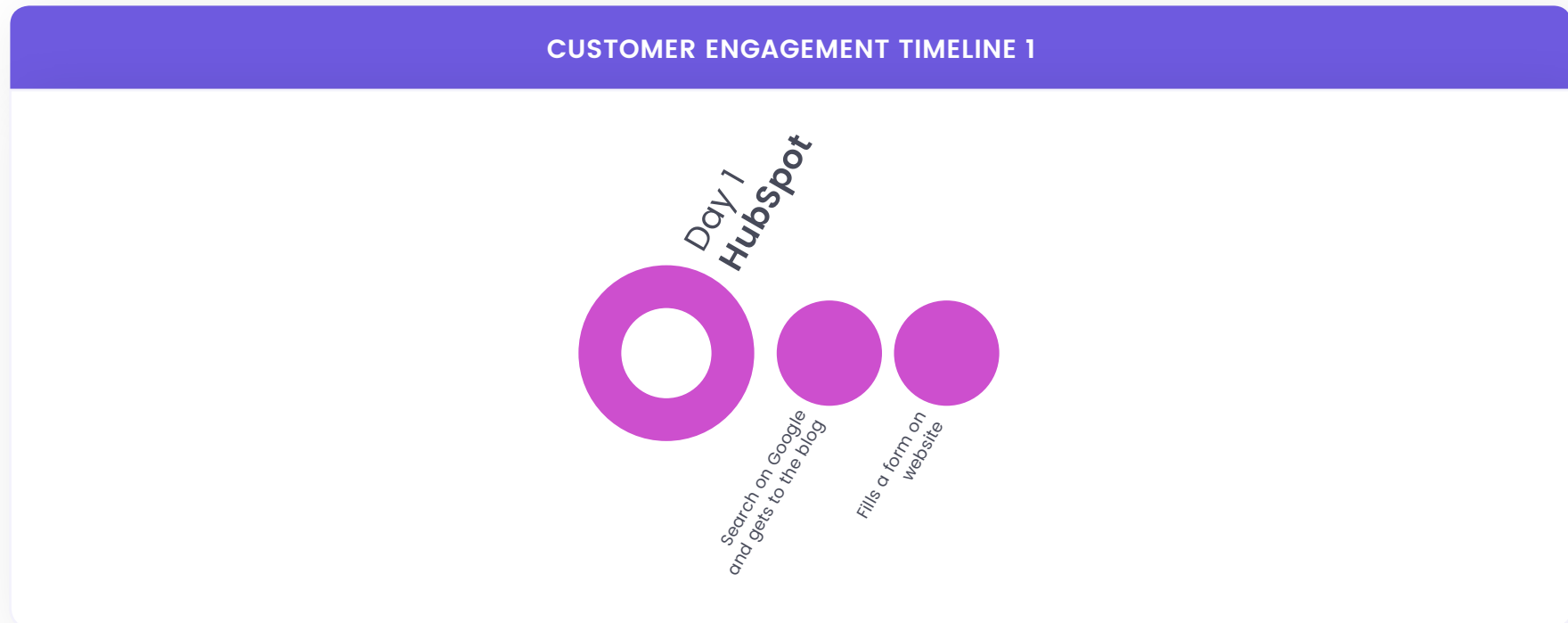
- ✓ **Lead Nurturing**
- ✓ **Lead Scoring**
- ✓ **Lead Attribution**



[5] CEB Research: Two Numbers You Should Care About

Luckily, social engagement data can help fill this gap.

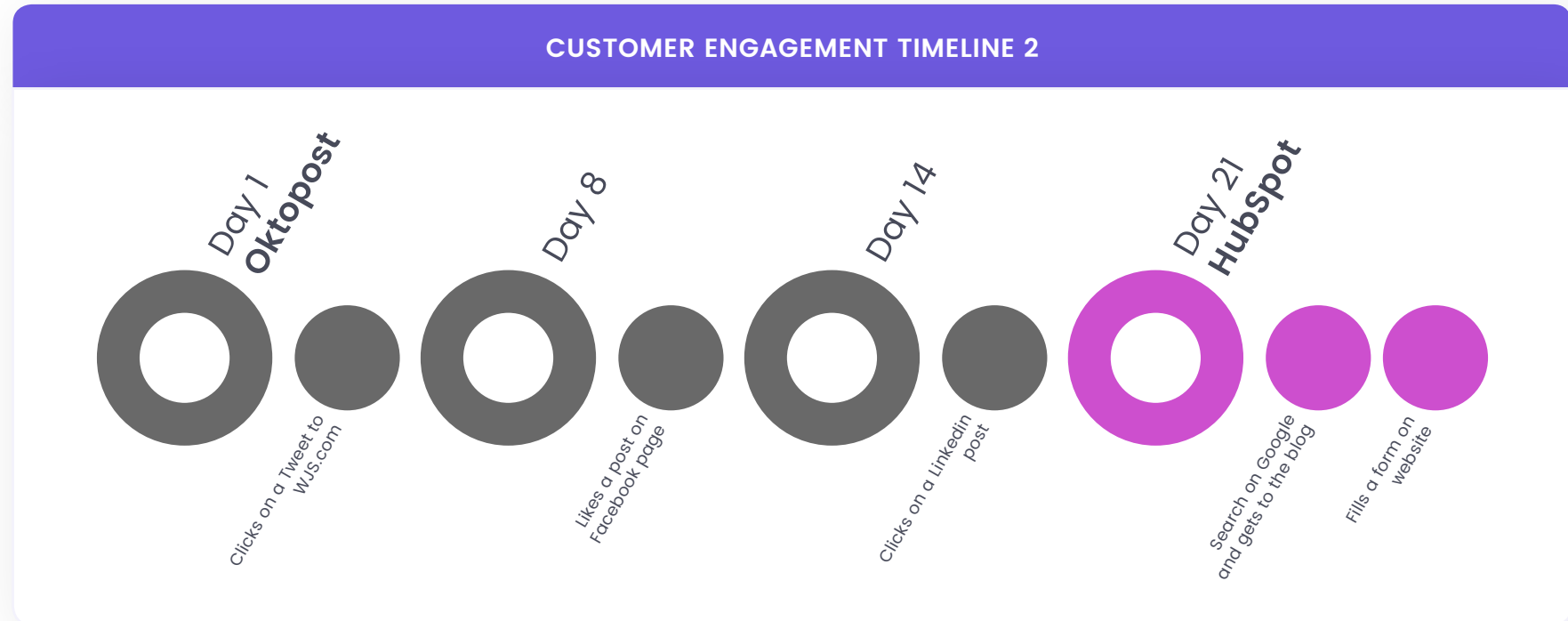
To illustrate this point, take a look at timeline #1:



This is what HubSpot views as a typical user interaction with a company's assets.

On day 1, a lead does a quick Google search, discovers Company A's blog, and eventually fills out a web form, which triggers the HubSpot programs.

Now take a look at the timeline #2.



This is what really happens. On day 1, a lead clicks on a Tweet to Wall Street Journal.com. 7 days later, he likes a post on the company's Facebook page. On day 14, he clicks on a LinkedIn post. Eventually, on day 22, he does a quick Google search, which leads him to the company's blog, whereby he fills out a web form that creates a lead in HubSpot.

As it turns out, HubSpot is missing a significant chunk of the buyer journey – social media activity. This chunk plays a critical role in the buyer’s awareness, evaluation, and decision making process.

This additional layer of social engagement data fills a major blind spot in HubSpot, which is illustrated in the table below:

| HUBSPOT RECORD SET | WITHOUT OKTOPOST | WITH OKTOPOST | WHAT'S IMPROVED? |
|------------------------|------------------|--------------------------------------|--|
| Time to known lead | 1 day | 22 days | Better measurement of anonymous-to-known leads |
| Lead Source | Organic Search | Social -> Twitter -> Curated Content | Accurate lead attribution for social media leads |
| Lead Interest / Intent | Unknown | Based on content engaged on social | Improved lead nurturing / segmentation based on social engagement activity |

In this respect, siloed social engagement refers to two things:

1. Any interaction with your social media content, including clicks, frequency of engagement, top engaging content topics, top converting posts etc.
2. Lead or prospect activity that is flowing from your social media channels to third party websites (e.g. a social post that links to a curated article or to any blog outside your website).


If tracked properly, social engagement can tell you a great deal about your lead's pain points, their top-of-mind interests, who they are connected to, and how to best target them. This data is extremely valuable not only because it's user-generated, but because it's typically fresh and accurate.

Now comes the good news!

By integrating HubSpot with Oktopost, you can introduce a whole new dimension of social engagement data directly to

your Timeline Events. For any given contact in HubSpot, marketers can view a detailed trail of information about their social media activity, for example which network, profile, campaign, and posts they engaged with before converting.

May 2018

-  Liad Guez had Oktopost event
Clicked on a Social Link
May 7 at 4:29 PM GMT+3
- Campaign Name: March 2018 Advocacy campaign
 - Campaign Tags: 2018, q1, advocacy, March
 - Click Datetime: May 7, 2018 9:25:43 AM
 - Click Id: actjgwa46axchv8
 - Message Keywords: Employee Advocacy programs, top brand ambassadors, a friendly competition
 - Network: Twitter
 - Post Datetime: May 2, 2018 11:21:22 AM
 - Poster Name: Eyal Aviv
 - Post Id: 004frivycuo10n8
 - Post Remote URL: <http://twitter.com/OktoTest2/status/991699170040967170>
 - Post Source: Autoposter
 - Profile Name: Oktotest

Collapse details

via Oktopost

All of this social engagement data integrates natively with HubSpot. The question is, what can you do with it?



LEAD NURTURING:

Deliver highly-personalized nurturing emails to leads based on the content they engaged with on social media.



LEAD SCORING:

Build a scoring model that prioritizes social touch-points, and in turn, drives more qualified leads.



LEAD ATTRIBUTION:

Accurately attribute demand generation to social media activities – and give social media the credit that it deserves.



LEAD SEGMENTATION:

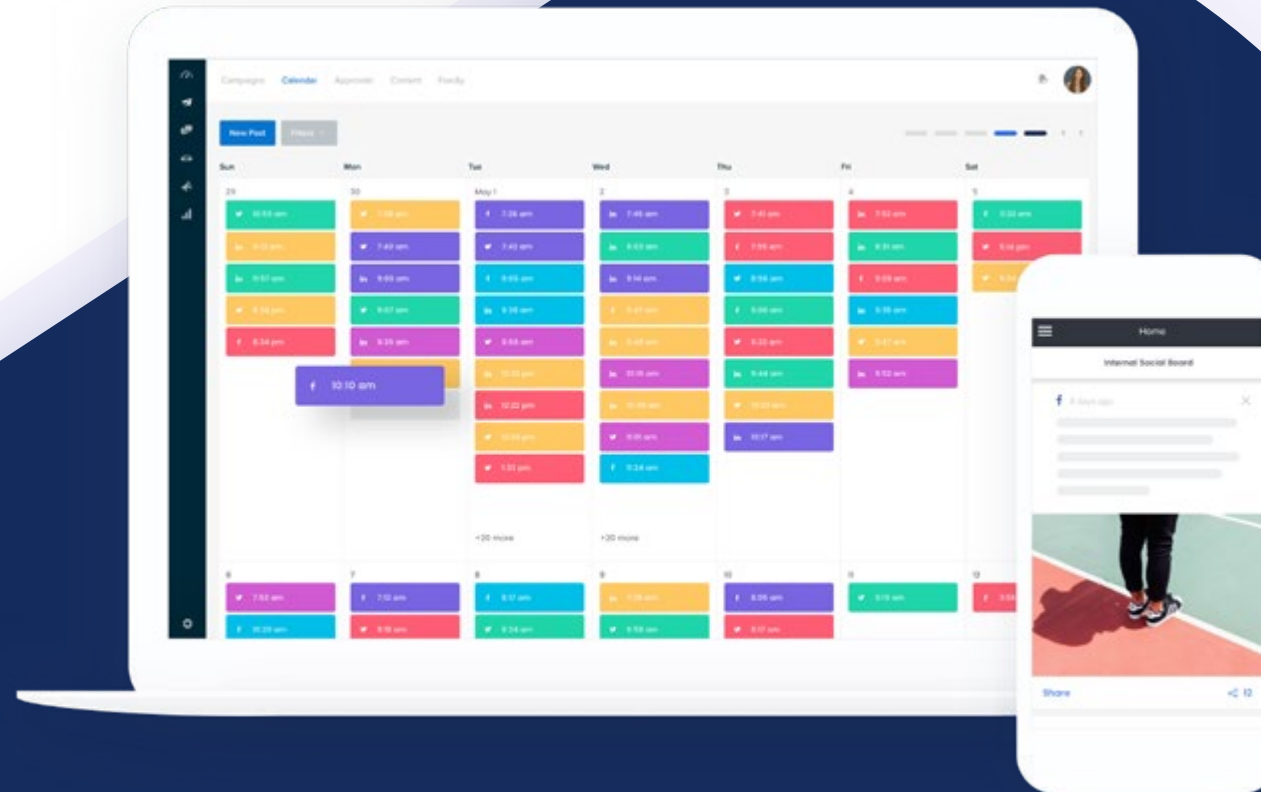
Segment audiences according to their interactions with social content, networks, and campaigns.

How Can Oktopost Help

Oktopost is the only social media management platform that is uniquely architected for B2B companies. Beyond publishing large values of content and engaging with audiences at scale, Oktopost enables you to establish the true ROI of social media by tracking leads and integrating this data with other marketing and sales technologies.

With Oktopost, companies can say for the first time: "This new customer came from this LinkedIn post!" or "This Tweet brought us \$XXX in sales!". Whether a lead came from a Tweet, LinkedIn post, or Facebook update, Oktopost enables users to attribute every sales opportunity to social media.

By integrating Oktopost with HubSpot, B2B marketing teams can automatically push social engagement data without any manual input. For every social interaction, Oktopost appends the activity to known contacts within HubSpot's Timeline Events for optimized lead nurturing, scoring, attribution, and segmentation campaigns and workflows.





CHAPTER
02

Lead Nurturing with **Social Engagement**

PAGES 16 – 20



What is Lead Nurturing

It's one thing to attract potential buyers, but quite another to keep them engaged and interested in your company throughout the buyer journey.

In fact, 50% of leads are qualified but not yet ready to buy, making it pertinent to have a disciplined process for building relationships with leads over time.^[4]

This is where lead nurturing comes in. Once you have qualified leads in your database, the next step is to educate and engage them with highly relevant content across multiple channels, in turn, driving them further down the sales funnel.

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Retargeting: Implement a highly personalized re-targeted ad, focusing on a buyer's persona, organization, and vertical.



Website: Customize a buyer's web experience in real-time by presenting the most relevant content based on their intent, behavior, and profile.

[4] Gleanster: Lead Nurturing Report

Using Social Engagement for Personalized Nurturing

At its core, lead nurturing is rooted in data. The more data you have on leads, the better you can craft engaging content and messaging. It's not enough to base your conversations on audience's website and email activity – what about social media touch points?

Buyers are spending an average of 116 minutes on social networks each day^[6], making it an extremely important channel for marketers to leverage. Not to mention, social media is where **55% of buyers search for information and 84% of CEO's and VP's make their purchasing decisions.^[7]**

If audiences are not active on your website but extremely active on Facebook, LinkedIn or Twitter, then you're missing out on a huge realm of valuable lead data, which can inform

you of buyer's' needs, challenges, and interests. With the Oktopost-HubSpot integration, you can use social engagement data to nurture the right people, with the right content, at the right time.

[6] The Telegraph: Is your daily social media usage higher than average?

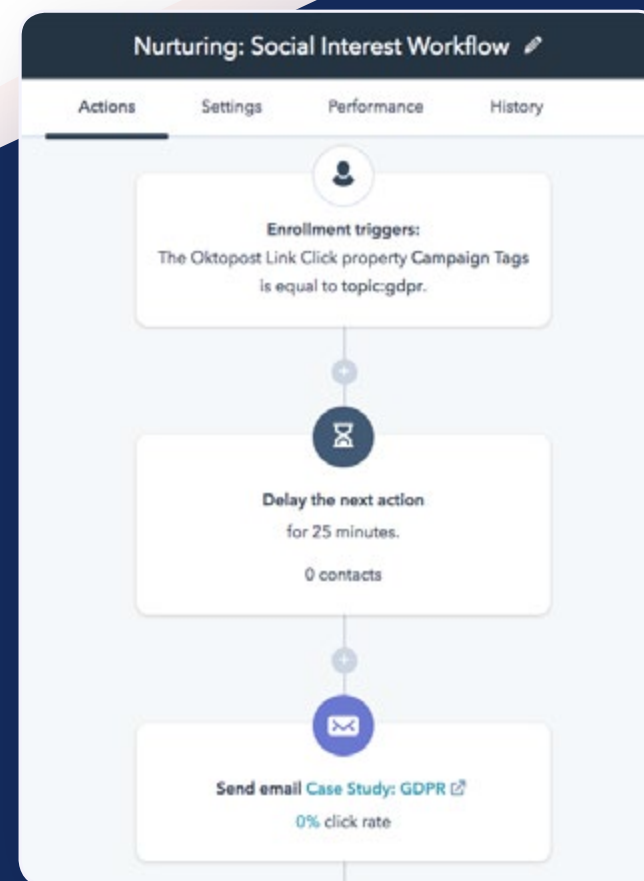
[7] International Data Corporation: Social Buying Study



Deliver Social-Interest Emails

Without social engagement data in HubSpot, you can only nurture leads based on first-known interest. This causes email fatigue and creates a negative experience for contacts, which ultimately turns them away from your brand altogether.

Using social engagement data in HubSpot, you can enroll leads in an email nurturing flow focused on the content topics they engaged with on social media. As seen in the example on the right, whenever a known lead clicks on a social post that's tagged with the topic 'GDPR', they will automatically receive a case study pertaining to 'GDPR' 25 minutes later. In this way, your leads are guaranteed to receive relevant content based on their social actions.

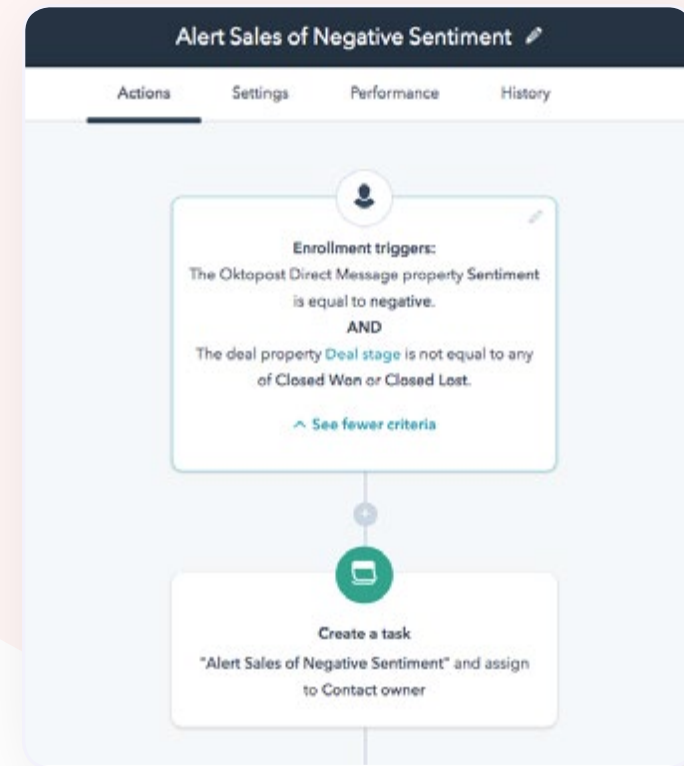


In using social engagement data for their own lead nurturing, SaaS companies have discovered that over the course of a month, real-time social-interest emails generate 2X the click-through rate of a typical nurturing emails (these are emails that don't take into account social engagement). The open-rates of these emails are also 50% higher than that of typical nurture emails.

Personalize Sales Conversations

When it comes to lead nurturing, B2B marketers are not the only ones that benefit from additional social engagement data. Similarly, sales professionals need to keep a constant pulse on their prospects' activity across all social media channels in order to understand their state of mind, communicate effectively, and most importantly, close deals.

With Oktopost's AI-powered social listening tool, marketers can monitor and analyze audience interactions (direct messages, comments, and mentions) across the various networks to surface negative or positive sentiment. By integrating these social signals with HubSpot, marketers can create an automated workflow, which alerts the relevant sales professional in real-time of a prospect's negative sentiment. This way, the respective sales representative can promptly follow-up with the prospect, turning a negative experience into a positive one.



Referencing social actions in emails doubles sales professionals' response-rate, allowing them to schedule more monthly appointments.

Whether you choose to send interest-based or sales-personalized emails, taking into consideration a lead's social activity makes for a more sophisticated nurturing campaign, and in turn, a more meaningful relationship.



CHAPTER
03

Lead Scoring with **Social Engagement**

PAGES 21 - 31



What is Lead Scoring

Gone are the days where marketers garnered a lead and automatically passed it to sales. With less than 50% of leads being sales-ready when they first come in^[8], how do you know when it's time for a sales rep to contact them? At what point is a lead defined as "sales-ready"?

B2B marketing departments have spent a great deal of time and resources answering these questions. With lead scoring, marketers can identify which leads can be pushed to sales and which leads require further nurturing.

Lead scoring is not a marketing-only methodology, rather a shared process for marketing and sales practitioners, which is vital to top-line revenue growth. Both teams can work together to use 'scoring' as a way of prioritizing leads based on their buying cycle and fit to your business.

[8] Gleanster: Lead Nurturing Report





Essentially, the more data marketing and sales teams have on leads and prospects, the better they can decipher the level of sales-readiness. When using HubSpot, contacts can be scored according to the following data:

- ✓ **Demographics and Firmographics.** Do leads seem like a good customer-fit based on their location, company size, and industry? The closer a prospect is to your ideal customer profile, the more likely they are to close, and the higher the score they're assigned.
- ✓ **CRM Data:** You can use interactions logged in your HubSpot CRM such as tracked email clicks, meetings booked, and calls made to determine the likelihood of prospects closing as customers within 90 days.
- ✓ **Marketing Data:** If you have the HubSpot Marketing Hub account, you can also use relevant web analytics, email interactions, and form submission events to determine the close probability of your contacts.

Using Social Engagement for Better Scoring

There's more to lead scoring than demographics, email interactions, and form submissions. To accurately determine a lead's level of sales-readiness, it's important to understand their need for your product or service. And for that, you need to track greater volumes of behavioral data.

Behavior is a very complex and multi-dimensional concept to decipher. Every second buyers are Googling, clicking, downloading, and watching content, so how do you evaluate the importance or relevance of different kinds of behaviors?

Most B2B marketers score email or website behavior as being highly relevant, such as form completions, email clicks, and white paper downloads. However, this type of

activity is only one dimension of behavior. It may inform you of how qualified a prospect is, but it won't give you the full picture of a prospect's place in the buying cycle, their topics-of-interest, or how ready they are to speak to a sales rep.

This is where social media comes in. **In fact, 35% of buyer engagement happens on social media**^[9]. The added value of social intent data is that it offers a whole new dimension of lead behavior that can greatly improve the accuracy of your lead scoring model.

[9] Marketo: State of Engagement Report



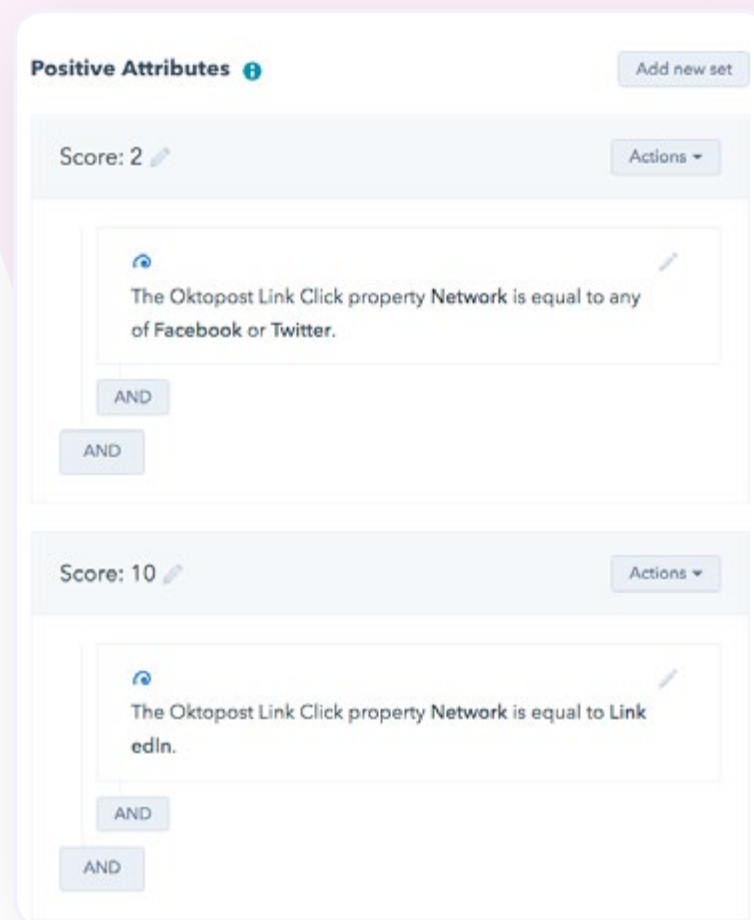
Score Leads Based on Social Network

When scoring leads based on social behavior, the first option that comes to mind is social networks – which social channels are leads coming from? And more importantly, on which channel are they most engaged on – is it Facebook, Twitter, or perhaps LinkedIn? With buyers conducting their own research and engaging with your brand on multiple social networks, it's pivotal to understand this complex picture to increase the accuracy of the sales qualification process.

Traditionally, B2B marketers have been accrediting LinkedIn as the king of lead generation. And they're certainly not wrong! In a recent analysis Oktopost conducted on over 100,000 social posts, it was found that **80% of B2B leads came through LinkedIn, followed by Twitter (13%), Facebook (7%), and lastly, Google+ (0.2%). Additionally, 43% of B2B marketers reported sourcing a customer from LinkedIn.**

Depending on your audience and content strategy per network, you may decide to give 10 points to leads who

engaged with your content on LinkedIn, and only 2 points to leads who engaged with your content on Facebook and Twitter.





Although LinkedIn appears to be leading the way as a power-tool for lead generation, it's important to highlight that what works for some B2B companies may not necessarily work for your company.

Ideally, you should extract insights from your social engagement data in order to appropriately allocate the scoring points. In doing so, you might discover that the majority of sale-ready leads click your Facebook posts before requesting a demo. Based on this data, you would infer that Facebook leads are more inclined to find solutions in your space, and given this information, you would give them more weight in the scoring model compared to LinkedIn or Twitter leads.

Score Leads Based on Content Topics & Types

Lead quality and sales-readiness cannot be solely determined by the social network that leads engaged with. You must take other social behaviors into consideration, including the content topics and types that drove leads to click and convert. Examples of scoring leads based on content topic and type are demonstrated below.

Single-disciplined vs. Multi-disciplined Behavior

Single-disciplined behavior refers to leads who engaged with one content topic, whereas multi-disciplined behavior refers to leads who engaged with numerous content topics.

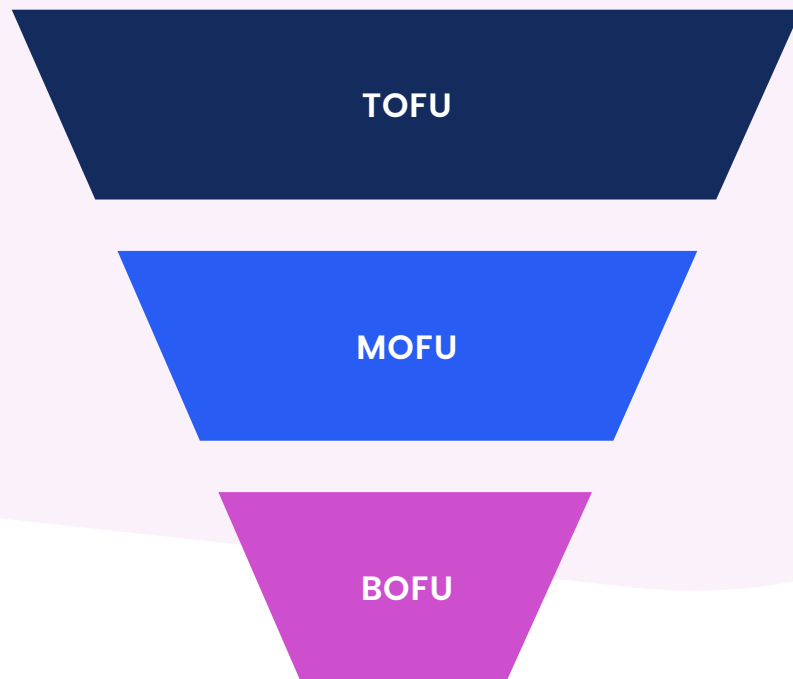
In other words, someone who constantly engages with the same topic over and over again on social media, might be looking for a specific solution that you offer. On the other hand, someone who views and interacts with a combination of topics, may be looking at a broad spectrum of solutions.

As such, it would be more difficult for you to determine their current level of interest or customer fit. Given this knowledge, it would make sense to increase a prospect's score if they engage in single-disciplined behavior as opposed to decreasing their score if they engage in multi-disciplined behavior.



Buying Stage

A lead's behavior with your brand content reflects their buying stage. Scoring for buying stage helps determine where a buyer is within the sales cycle – namely, are they engaging with top, middle, or bottom of the funnel content.



- ✓ **TOFU (top of the funnel):** Represents a larger pool of audience who typically engage with blog posts, videos, and infographics that build brand awareness.
- ✓ **MOFU (middle of the funnel):** Buyers engage with more advanced educational materials that use the company's solutions to address their needs and challenges. These typically come in form of eBooks, and webinars.
- ✓ **BOFU (bottom of the funnel):** Represents "hot leads" who are more interested in content that positions the company as the 'best solution out there', for example pricing pages, product demos, and customer case studies.

Increase or decrease scores according to a lead's buying stage. Leads engaging on social media with product demos or customer case studies should be attached a higher score than leads engaging with blog articles. This ensures that only quality leads are being fast-tracked to sales.

The screenshot displays a 'Positive Attributes' configuration window. It features two distinct scoring rules, each with a header bar indicating the score and an 'Actions' dropdown menu.

Rule 1 (Score: 5):

- Condition: The Oktopost Link Click property Campaign Tags is equal to type:blog.
- Logic: AND
- Logic: AND

Rule 2 (Score: 10):

- Condition: The Oktopost Link Click property Campaign Tags is equal to any of type:casestudy or type:demo.
- Logic: AND
- Logic: AND

Score Leads Based on Activity

A lead may be extremely active on your social channels, but super inactive on your website – does that mean they're any less interested in your product or service? The more you understand buyers' actions across multiple channels, including social media, the faster you can move a prospect from pre-qualified to an actual opportunity.

Without social engagement properties, you may assume that potential buyers are uninterested, and as such, give them a negative score. This blindspot is detrimental to your scoring model because it misinforms you of a lead's sales-readiness. To prevent this, you can score leads based on their **engagement type**.

Engagement Type

Engagement type refers to the specific action taken by individuals on social media, for example:



Liking a
post



Clicking a link
in a post



Sending a direct
message



Sharing a
post



Commenting
on a post



Mentioning
company handle

Since engagement types like shares and likes can be taken by leads at any stage of the buyer journey (or more specifically, towards the beginning of the funnel), they may be given a lower score. In this case, the low score indicates low interest and the need for further nurturing. In contrast, engagement types like link clicks inform us of “mature leads” who are far more ripe to take the next step in the sales cycle.

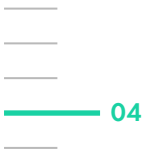
The image shows a user interface for configuring lead scoring attributes. It consists of two side-by-side panels, each titled 'Positive Attributes' with an information icon. The left panel shows a score of 5 and a condition: 'The Oktopost Link Click property Profile Name is equal to Acme.' The right panel shows a score of 1 and a condition: 'The Oktopost Like property Profile Name is equal to Acme.' Both panels have an 'Add new set' button at the top right and an 'Actions' dropdown at the top left. Below the conditions, there are 'AND' connectors indicating logical grouping.

| Attribute Set | Score | Condition |
|---------------------|-------|---|
| Positive Attributes | 5 | The Oktopost Link Click property Profile Name is equal to Acme. |
| Positive Attributes | 1 | The Oktopost Like property Profile Name is equal to Acme. |



CHAPTER
04

Lead Attribution with **Social Engagement**



PAGES 32 - 38

What is Lead Attribution

Lead attribution is used to credit programs that helped drive pipeline and sales revenue. With HubSpot, attribution can also give credit to moving someone forward in your business model. These are the attribution models offered by HubSpot:

- 1. All interactions:** All touch points in the conversion path share equal credit for the conversion. In this attribution model, the score for each contact is divided equally among each URL, referring URL, or source that the contact interacted with leading up to the conversion.
- 2. First touch:** The first page or source from the first visit to your site receives 100% of the score for each contact. Last touch: The page or source that brought the contact to your site for the visit where they converted receives 100% of the score for each contact.
- 3. Last interaction:** The last page view or source that led directly to the conversion. In this attribution model, 100% of the score for each contact will count toward that page or source.
- 4. First and last interaction:** The first and last touch points in the conversion path each receive 50% of the credit for the conversion. In this attribution model, the score for each contact will be divided equally between each page or source.
- 5. Simple decay:** The last six interactions leading up to the conversion. With this model there is more weight given to more recent pages. The points for each contact are distributed starting with the most recent at 50%, 25%, 12.5%, 6.25%, 3.125%, and 1.563%.



Using Social Engagement for Accurate Attribution

Social media plays a critical role across the entire lead lifecycle. It's both a first-touch acquisition source and an influencing factor throughout the buyer's journey.

Prospects and customers learn about your solutions through Google searches, but also interact with your brand directly on social media.

The biggest problem is that most B2B marketers only track top-of-funnel activities like traffic and click-through rates on social media, without considering the real revenue contribution of social networks. This is because marketers often view social media solely as a brand awareness tool, when they should be viewing it as an engagement channel, where conversations start and education continues.

A lead can go from clicking on a social post to viewing your webinar, to watching a product demonstration. Shortly after watching a product demo, the lead speaks with one of your sales reps, an opportunity is created, and one month later, they become a new customer.

In a world where social engagement is ignored in HubSpot, 100% of revenue and resources would be credited back to the webinar. But is this realistic? No. Let's take a look at the following study.





Study on SaaS Companies

Lacking critical social insights, B2B marketing teams typically attribute 4% of MQLs to the wrong source. While 4% seems insignificant, imagine that these are thousands of leads being credited to email or website, when in fact, they came through social channels.

By integrating HubSpot with Oktopost, we have found that 24.9% of B2B buyers take relevant social actions each month – actions like clicking, liking, and converting from a post.

With these numbers in mind, B2B marketers were able to pinpoint the true contribution of social to their website conversion rates. In doing so, they could shift the way they allocate resources within the marketing team, giving more weight (about a quarter of their budget and time) to social media.

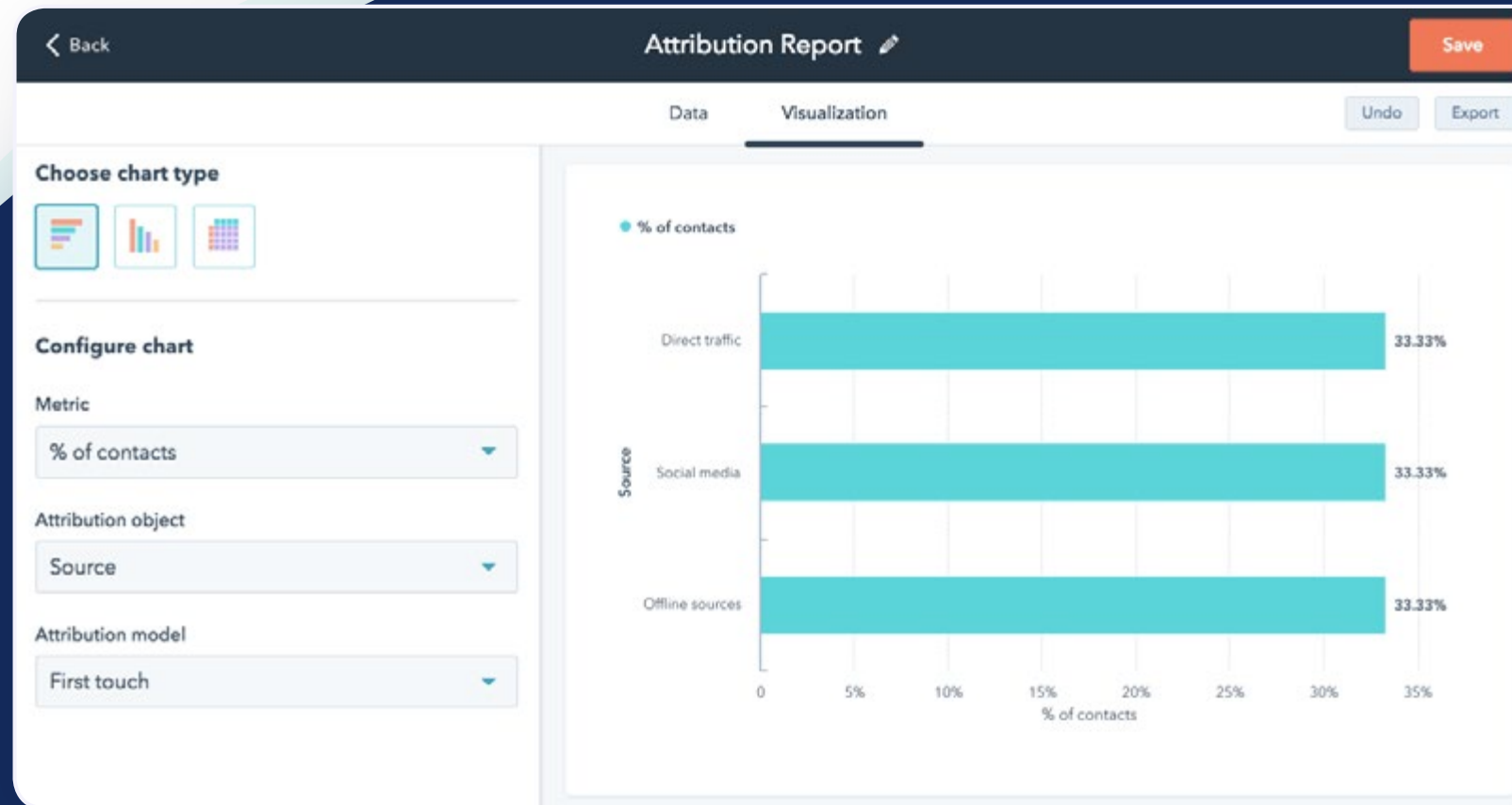
First-Touch Attribution Report with Social Engagement

The key to a successful attribution report is to understand all of the contributing factors that drive conversions throughout the funnel. After all, not all page views or marketing channels are treated equally when it comes to conversions. It all depends on what you hope to distill from the data. To get the most insight out of your attribution model, you need to ensure that all of that data properties are available to your marketing team.

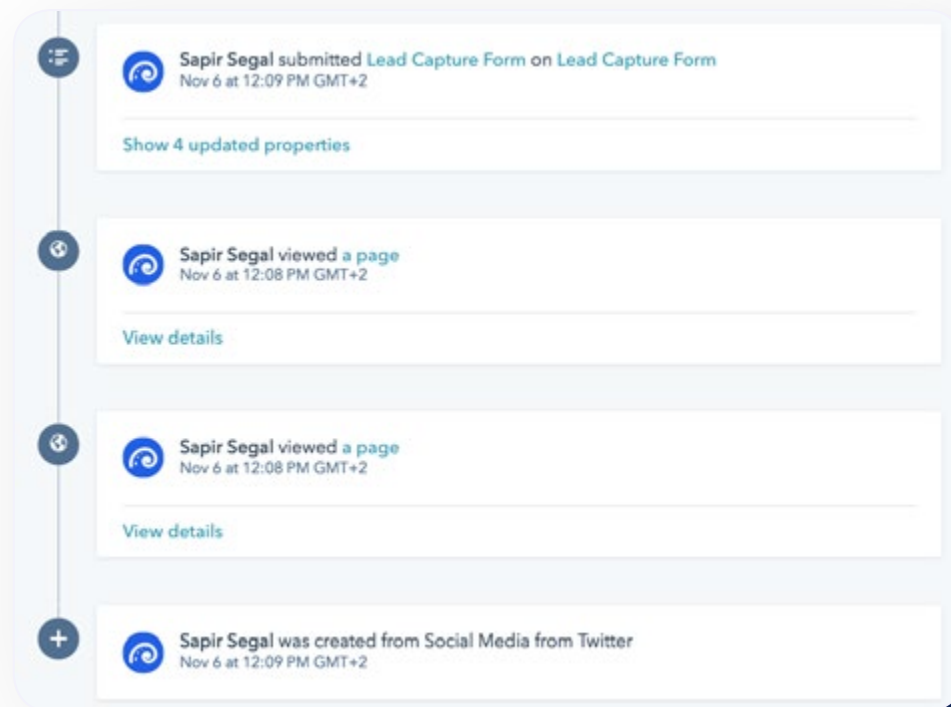
This is where the HubSpot-Oktopost integration comes in. With the wealth of social engagement properties provided at the contact level, you gain full visibility into the various stimulus (from email to social media) that influenced or drove a conversion on your website. As a result, you gain the opportunity to properly analyze how different social media interactions (including direct messages, comments, link clicks, etc.) led your leads to convert, and figure out ways to improve your results.







In the example shown below, a first-touch attribution report has been set up to capture leads whose first interaction with the brand was on social media. The first time a user clicks on an ok.to link, the HubSpot integration is triggered, and the attribution source (the initial touch point) will appear as 'Social Media'.



To put this into context, imagine the following scenario: a new contact clicks on a Tweet, which then leads them to fill out a webinar registration form, and two days later, drives them to speak to a sales representative. In this scenario, although multiple actions were taken, only social media will be credited for acquiring the new lead.



A screenshot of a HubSpot activity timeline for a contact named Sapir Segal. The timeline is a vertical list of four events, each with a circular icon on the left, a HubSpot logo, a title, and a timestamp. The events are: 1. 'Sapir Segal submitted Lead Capture Form on Lead Capture Form' (Nov 6 at 12:09 PM GMT+2) with a 'Show 4 updated properties' link. 2. 'Sapir Segal viewed a page' (Nov 6 at 12:08 PM GMT+2) with a 'View details' link. 3. 'Sapir Segal viewed a page' (Nov 6 at 12:08 PM GMT+2) with a 'View details' link. 4. 'Sapir Segal was created from Social Media from Twitter' (Nov 6 at 12:09 PM GMT+2). The timeline is set against a light blue background with a vertical line and circular markers.

-  **Sapir Segal submitted Lead Capture Form on Lead Capture Form**
Nov 6 at 12:09 PM GMT+2
[Show 4 updated properties](#)
-  **Sapir Segal viewed a page**
Nov 6 at 12:08 PM GMT+2
[View details](#)
-  **Sapir Segal viewed a page**
Nov 6 at 12:08 PM GMT+2
[View details](#)
-  **Sapir Segal was created from Social Media from Twitter**
Nov 6 at 12:09 PM GMT+2

With the new layer of social engagement data in HubSpot, you can accurately associate a lead with a source and give credit to social media interactions that drive pipeline growth. It also gives you the opportunity to properly analyze the social media path (e.g. clicking a social link, sending a direct message, retweeting, etc.) that led to a particular conversation on your website, and figure out ways to improve your results.



CHAPTER
05

Lead Segmentation with **Social Engagement**



PAGES 39 – 45

What is Lead Segmentation

In today's competitive market, there is no such thing as 'one size fits-all'. A person in an executive role, for example, requires a different piece of content than someone in a junior role. Knowing who your most important audiences are, which messages resonate with them, and the best time to target them, is more challenging than ever.

The best place to start is by grouping your contacts by similar characteristics and then tailoring relevant content journeys to each group. With HubSpot, you can segment contacts using two different types of Lists:

- ✓ **Active Lists:** Active lists are dynamic, meaning that they automatically update and contacts will join the list whenever they meet the criteria and leave the list when they no longer meet the criteria. For example, an active list would be valuable when you have an email campaign to a particular subset of your contacts running over time, and always want the list to update with new contacts who meet the criteria.
- ✓ **Static Lists:** Static lists do not update as new contacts meet the criteria. Instead, they are a snapshot of a group of contacts who meet a certain set of requirements at a certain time. Contacts can be manually added and removed from static lists. A static list can be helpful to gain an understanding of contacts who met a certain criteria on a particular date. Then, you can look back at that static list later and see contacts who may no longer qualify for the criteria.

Next, HubSpot allows you to choose from the following criteria to filter contacts in a list:

- ✓ Contact property
- ✓ Company property
- ✓ Deal property
- ✓ Activity
- ✓ List membership
- ✓ Form submission
- ✓ Marketing email activity
- ✓ Import
- ✓ Page view
- ✓ Event
- ✓ Workflow status
- ✓ Call-to-Action
- ✓ GoToWebinar webinar status
- ✓ SurveyMonkey response
- ✓ AdWords property
- ✓ Facebook Ad property
- ✓ LinkedIn Ad property

These list criteria can be combined in multiple ways to filter contacts on more granular levels.

The more data you have, the more effective you can be at segmenting your contacts and delivering engaging content.

So, let's get personal! In the next section, we'll zero in on how B2B marketers can leverage social engagement data to build smarter **Active Lists** in HubSpot for delivering a more personalized content experience.



Using Social Interests for Smarter Segmentation

On social media, there are many ways in which audiences display interest with your brand. It can be as direct as sending you a personal message or as indirect as clicking one of your posts. These various engagement types say a lot about what your audience care and want to learn more about.

By connecting Oktopost's social engagement data with HubSpot, you can build much more sophisticated Active Lists to automatically capture these socially-active audiences and provide them with personalized content.

Below, we will demonstrate the steps you need to take in HubSpot:

1. Choose Oktopost Properties

First, you need to create an Active List based on Oktopost's social engagement properties. These properties serve as criteria for identifying and organizing your contacts by common interests. By understanding the various types of social engagement properties in HubSpot, you can determine which criteria makes sense for filtering your contacts into a specific list.

Here are two examples of Oktopst social engagement properties that can be used to segment contacts by common interests:

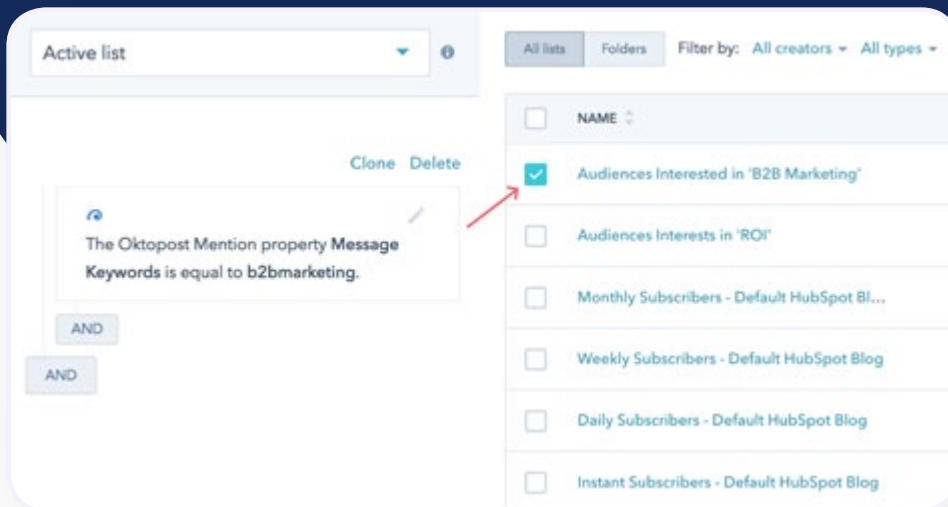
a) Mention property:

When people share or retweet your content on social media, they typically mention your company's handle. As such, Oktopost's machine learning algorithm scours social media for various posts that mention your brand and

analyzes them for popular keywords. In the image below, the keywords **b2bmarketing** and **socialmedia** appear to generate the greatest engagement across all networks. Of course, these popular keywords vary per company.

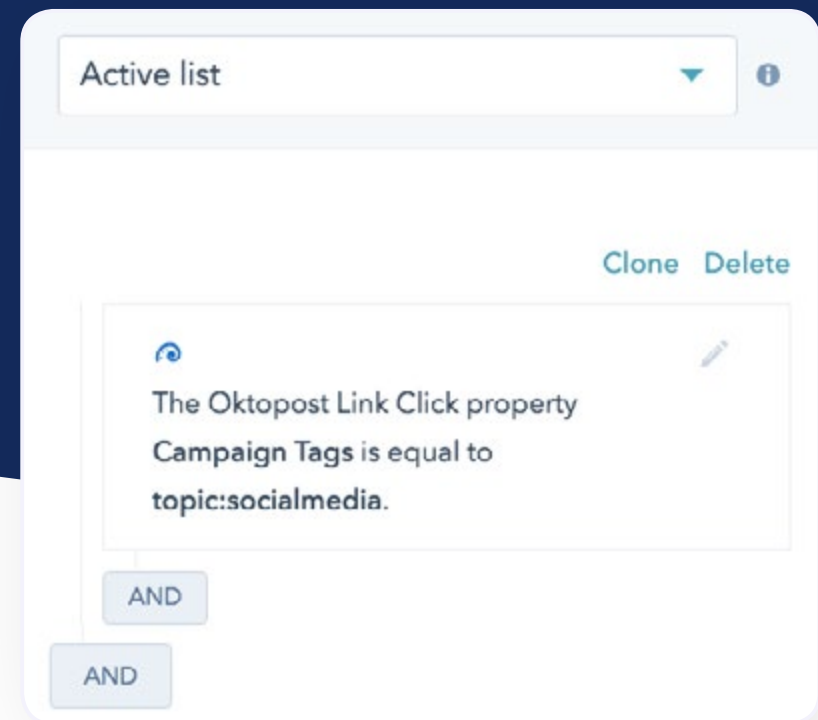


What you can do is build an audience segment around these popular keywords. Simply select the 'Mention property', choose 'Message Keywords', and type the keywords relevant to your brand. In the example on page 44, any time someone posts a message that contains the keyword 'b2bmarketing', they will automatically get pushed into the Active List called 'Audiences Interested in B2B Marketing'.



b) Link Click property

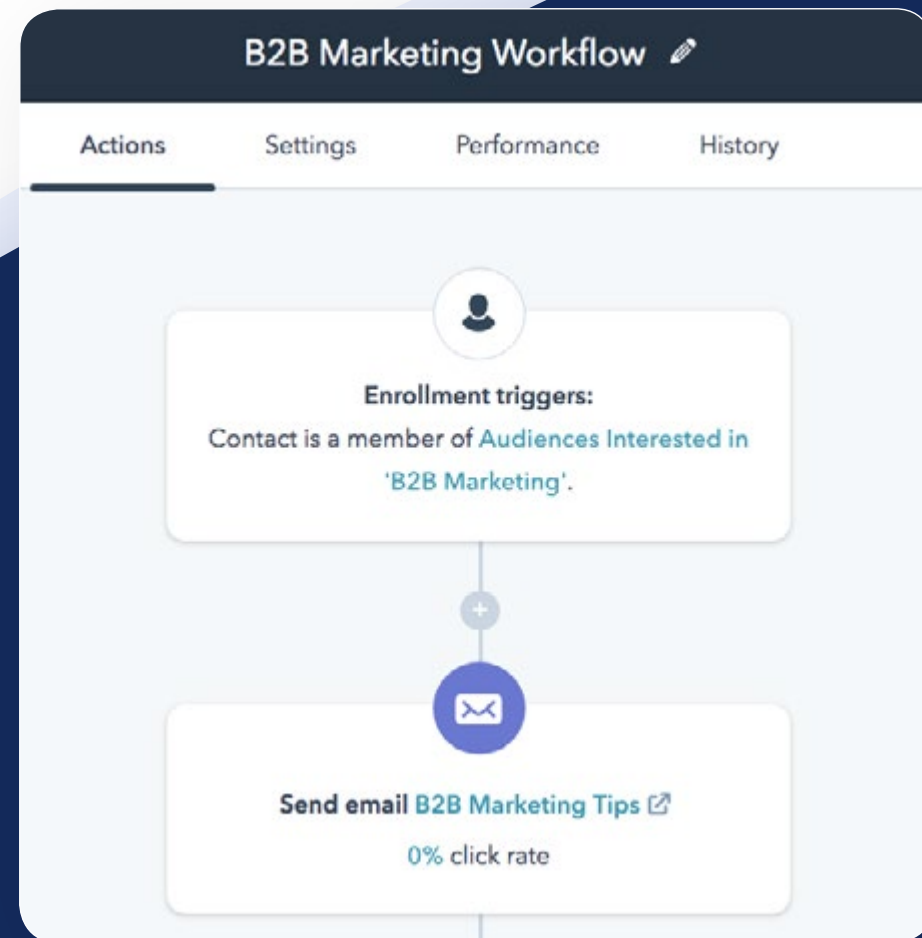
The Link Click property presents another set of criteria for determining your audience's interest in a particular topic. Similar to the steps above, you can create an Active List based on the content topics your audience clicked on social media. As seen in the example above, any time someone clicks on a post containing the campaign tag 'topic:socialmedia', they will automatically get enrolled into an Active List of your choice.

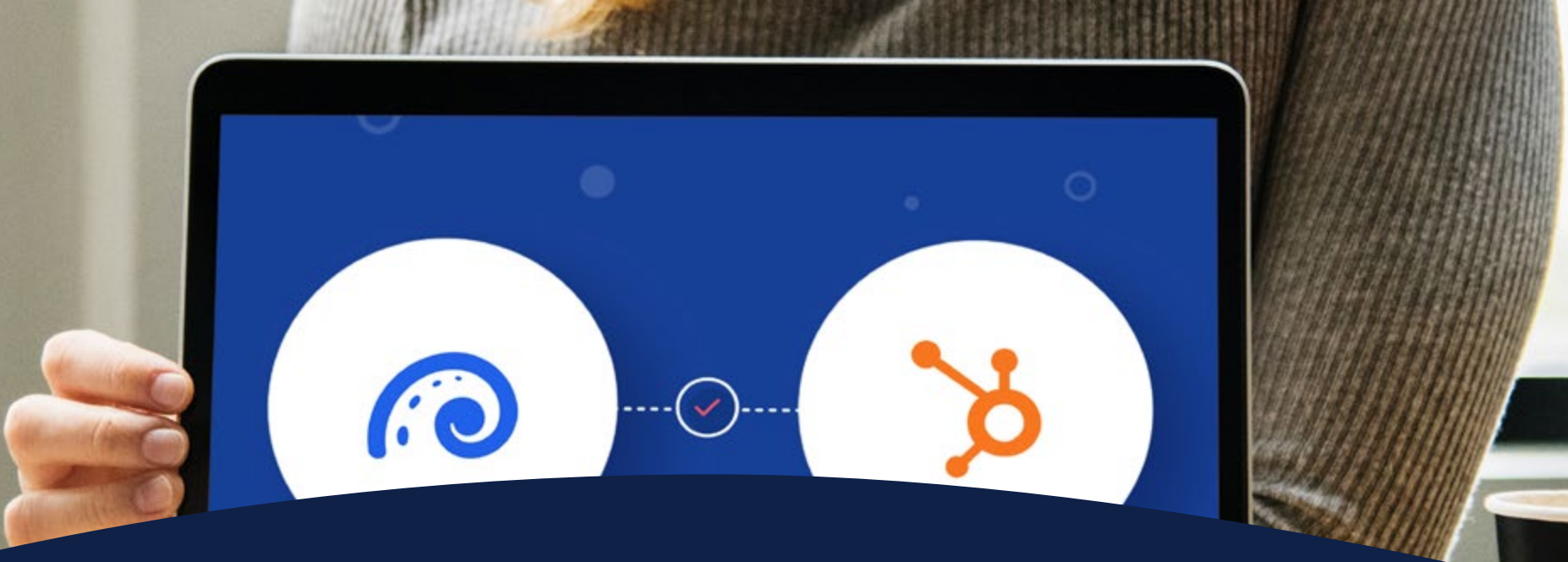


Note: The Mention or the Link Click properties are just two examples of how social engagement data can be used to understand the essence of your prospects and customers' interests. There are plenty of other Oktopost properties that you can use to filter and segment your audiences into relevant groups.

2. Deliver Personalized Content

Using the Active Lists you've created above, you can enroll leads into relevant workflows where they will receive content that aligns with their social media interests. In the example below, we've created a workflow that sends an email with 'B2B Marketing Tips' to any contact who's a member of the 'Audiences Interested in B2B Marketing' list. This level of personalization goes a long way towards increasing content visibility and engagement.





Enrich your HubSpot programs with **social engagement**

Discover how leading B2B marketing teams are leveraging Oktopost's social engagement data to better manage, target, and convert leads in HubSpot.

[Request a demo](#)

