NetLine

THE NETLINE TOOLKIT FOR SMARTER, STRONGER LEAD NURTURE

PLAYBOOK + CHECKLIST + TIP SHEET

The 5 Steps You Need to Nurture Leads Into Sales Opportunities

INTRODUCTION

Your leads aren't waiting to be converted. They're *deciding* who's worth their time.

When someone downloads content via NetLine, you've captured intent, not just a name. But without a smart nurture strategy, that moment of engagement fades fast.

WHY THIS TOOLKIT MATTERS

Three challenges make nurturing syndicated leads unique:

Familiarity:

They engaged with your content, but may not know your brand.

Intent Clarity:

They've raised their hand on a topic, not necessarily your product.

Influence:

They could be decision makers, or they're influencers with hidden sway.

This toolkit gives you proven practices to deepen intent and turn NetLine leads into pipeline, starting from Day 1.

WHAT YOU'LL MASTER

This comprehensive toolkit delivers three powerful resources:

The Lead Nurture Playbook:

Your strategic guide outlining the five essential steps to build, automate, and optimize your lead nurture program using NetLine-generated leads.

The Lead Nurture Checklist:

Your step-by-step, ready-to-use checklist to ensure every aspect of your nurture strategy, from setup to follow-up, is aligned and activation-ready.

The Lead Nurture Tip Sheet:

Your punchy, quick-reference resource packed with tactical tips, best practices, and golden rules to help you move fast and nurture smarter.

Each resource walks you through the key steps to plan, launch, and optimize your nurture campaigns using NetLine while extending impact across your entire marketing ecosystem.

READY FOR LAUNCH?

Your journey to creating follow-ups that actually follow through starts now.

Launch sequence initiated. Let's begin!

HOW NETLINE POWERS SMARTER LEAD NURTURE

TREAT BUYERS LIKE BUYERS, NOT LEADS

A smarter nurture strategy doesn't start with a name. It starts with real behavior.

NetLine connects you to in-market professionals actively researching relevant topics, armed with the first-party signals you need to follow up with confidence, precision, and purpose.

WHAT MAKES A NETLINE LEAD DIFFERENT?

- They're actively researching, but may not know your brand.
- They've shown interest through content engagement, but may not be ready for a sales call.
- They provide buyer-level signals via first-party behavior and optional or required custom responses.
- They may be early-stage influencers, not always final decision makers.

This makes your lead nurture strategy not just a follow-up, but a meaningful first impression.

CORE CAPABILITIES THAT DRIVE SMARTER NURTURE

INTENT OVER IDENTITY

Every NetLine lead is earned through first-party content engagement driven by topic relevance at the moment of registration. That's your cue to build nurture tracks based on real interest, not assumptions or titles.

BUILT-IN SEGMENTATION

Custom questions reveal buyer needs, priorities, and timelines; perfect for fast segmentation. Use this data to segment leads from day one and tailor messaging to what matters most.

PERFECT YOUR TIMING

NetLine's behavioral benchmarks show that most B2B professionals engage with content 48-72 hours after they register for it. Time outreach to hit when interest peaks, not fades.

SMART SCALE FOR ABM + CONTENT TRACKS

Whether it's ABM, webinars, or persona tracks, NetLine matches your strategy across accounts and stages.

INTEGRATE SEAMLESSLY

Leads flow directly into your CRM or MAP with zero friction. No delays. No manual uploads. Just clean data, routed quickly, and ready to activate.

SMARTER SIGNALS FUEL SMARTER NURTURE

When every signal comes from real buyer behavior, your messaging isn't just timely; it's trusted. Smarter signals drive smarter nurture. And smarter nurture leads to real pipeline.

ACCESSING THE NETLINE PORTAL

BEFORE YOU BEGIN: LOG IN OR CREATE YOUR NETLINE PORTAL ACCOUNT

Log into the **NetLine Portal** to launch campaigns, manage leads, and track performance.

ALREADY HAVE AN ACCOUNT?

Visit **portal.netline.com** and log in using your email and password.

NEED AN ACCOUNT?

Creating an account is free and takes less than 2 minutes.

Go to **portal.netline.com/signup** to get started.

Once you're in, you'll be able to:

- Launch and manage campaigns
- Upload and track content
- Access leads and lead insights in real-time
- Connect your CRM or MAP

NEED HELP?

Send us an email at **portal-support@netline.com**, and we'll get back to you as soon as possible with the answers, guidance, or resources you need to keep your campaign moving forward.

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THE LEAD NURTURE PLAYBOOK

Your strategic guide outlining the five essential steps to build, automate, and optimize your lead nurture program using NetLine-generated leads.

STEP 1: DEFINE YOUR FOLLOW-UP POLICY

A great lead is only as good as your next move.

WHAT IT IS

A shared, documented agreement between marketing and sales that outlines:

- How leads are scored
- How they're segmented
- How and when they're routed

All based on behavioral signals, qualification criteria, and campaign context.

WHY IT MATTERS

Even high-quality leads fall through the cracks without a coordinated plan.

A strong follow-up policy ensures:

- Alignment between teams
- Faster, smarter handoffs
- Consistent buyer experiences
- Higher conversion potential

HOW NETLINE MAKES THIS EASY

Every lead delivered by NetLine includes first-party behavioral data, campaign-level context, and optional or required custom question responses. These insights are the building blocks for:

- More accurate lead scoring
- Smarter nurture track segmentation
- Clear, enforceable handoff triggers

NETLINE INSIGHTS

Your follow-up policy isn't just documentation; it's your first line of defense against lead waste.

When powered by real buyer behavior and aligned across teams, it transforms every follow-up into a revenue-ready opportunity.

STEP 1: DEFINE YOUR FOLLOW-UP POLICY (CONTINUED)

A great lead is only as good as your next move.

FOLLOW-UP PLANNING CHECKLIST

Use this checklist to turn behavioral signals into a high-functioning lead management system.

1 SCORING & PRIORITIZATION

☐ **Prioritize by Persona + Firmographics**

- Use Job Level, Industry, and Revenue data to prioritize leads based on buying authority and ideal customer fit
- Weight leads according to decision-making authority
- Factor in company size and industry alignment

☐ **Map Content Type and Topic to Funnel Stage**

- Let content formats and topics guide your routing logic
- Assign higher scores to bottom-funnel content engagement
- Consider topic relevance to current business prioritiesalignment

2 SEGMENTATION & ROUTING

☐ **Assign to Sales or Nurture**

- Use campaign filters or custom question responses (e.g., project timeline, primary challenge) to determine the next step
- If responses indicate urgency or buying activity, send to sales
- Otherwise, assign to an automated nurture track

☐ **Establish Handoff Triggerse**

- Set up real-time delivery via connector or email
- Create clear rules in your CRM/MAP for qualified leads to flow to sales without delay
- Define specific scoring thresholds for sales handoff

3 OPERATIONAL INTEGRATION

☐ **Sync With Your CRM and MAP**

- Ensure leads route cleanly into platforms like Salesforce, HubSpot, or Marketo
- Avoid manual uploads and data delays
- Maintain consistent field mapping across systems

FROM SETUP TO FOLLOW-UP

- Start with broad filters during campaign setup
- Monitor lead quality and conversion trends for 3-5 days
- Adjust filters based on performance data
- Maintain flexibility to optimize based on results

STEP 2: AUTOMATE OUTREACH WITH NETLINE SIGNALS

Turn behavioral data into timely, relevant nurture at scale.

WHAT IT IS

An automated follow-up framework that uses real buyer behaviors, like content engagement, job level, and industry, to trigger timely, personalized outreach through your MAP (Marketing Automation Platform).

WHY IT MATTERS

Not every lead is ready for sales, but every lead can be moved closer to it.

Automation allows you to:

- Move faster
- Match message to intent
- Scale personalization

HOW NETLINE MAKES THIS EASY

NetLine's real-time connectors and daily and incremental lead fulfillment options give you instant access to:

- Engagement metadata (content type, title, timestamp)
- Firmographics (job level, company size, revenue, industry)
- Custom question responses (e.g., purchase timeline, pain points)

This makes it simple to build logic-driven workflows in your MAP that reflect actual buyer intent.

NETLINE INSIGHTS

Let the lead's behavior set the pace. Fast movers? Accelerate. Passive? Educate. Your automation should adapt to them. Not the other way around.

STEP 2: AUTOMATE OUTREACH WITH NETLINE SIGNALS (CONTINUED)

Turn behavioral data into timely, relevant nurture at scale.

MAP WORKFLOW PLANNING TIPS

Use this guide to automate follow-up that reflects what your leads want and when they're ready for it.

1 SET LEAD TIMING LOGIC

TOFU Leads (eBooks, Guides)

Wait 48–72 hours before outreach. Let them consume the content first.

BOFU Leads (Webinars, ROI Tools)

Reach out within 24 hours to strike while intent is high.

Light Touch Rule

If <48 hours since download, send a soft-check-in with helpful context, not a pitch.

2 TRIGGER SMART NURTURE TRACKS

Use Content Type, Topic, and Funnel Stage

Segment leads by asset type and topic to send appropriate follow-up (e.g., share additional resources for TOFU; offer demo for BOFU).

Filter by Custom Question Responses

Build branching logic based on responses (e.g., route buyers with near-term timelines to SDR sequences.)

3 CONNECT SYSTEMS FOR SPEED AND SCALE

Enable Real-Time Connections

NetLine offers real-time connections so your MAP, CRM, and other downstream tools can process leads immediately and continuously.

Map Key Fields

Sync NetLine data fields like Job Level, Company Size, and Campaign Title to the corresponding fields in your MAP/CRM.

Score Based on Buying Signals

Use firmographics and behavior to assign engagement scores that inform track A/B/C logic.

ADVANCED AUTOMATION

Turn a good nurture into a great nurture with dynamic logic and smarter workflows.

SAMPLE NURTURE FLOW USING NETLINE SIGNALS

```
      ⬇
New NetLine Lead Delivered (via Daily or Incremental Fulfillment)
      ⬇
Is Content Type BOFU?
     ├── YES → Trigger Sales Outreach Track
     |          └── Email 1: Quick demo invite
     |          └── Email 2: “ROI of solving [Challenge]”
     |          └── Email 3: “Ready to talk?”
     |
     └── NO  → Continue →
      ⬇
Does Custom Question = Near-Term Purchase?
     ├── YES → Accelerated Nurture Track (Short window)
     |          └── Email 1: Framing the problem
     |          └── Email 2: Customer story
     |          └── Email 3: Book time
     |
     └── NO  → Standard TOFU Track
      ⬇
Segment by Job Level or Company Size
      ⬇
Send Dynamic Content by Persona
```

ADVANCED AUTOMATION BEST PRACTICES

Dynamic Content Blocks by Persona
Tailor emails for C-suite vs. managers using NetLine's Job Level field.

Lead Velocity Tracking
Set time-based rules to score faster-moving leads higher (e.g., consuming multiple assets in 3 days = sales ready).

Mid-Campaign Filter Tightening
Start broad. Refine after 3-5 days based on engagement quality.

CRM Flags for Sales Visibility
Push "nurture track" field into your CRM so reps know what emails the lead has seen before making contact.

Fallback Rule for No Engagement
After X days and no opens/clicks, move lead to a re-engagement or hold track.

STEP 3: MAP MESSAGING TO FUNNEL STAGE

The right message means nothing if it lands at the wrong time.

WHAT IT IS

A strategic messaging framework that aligns your follow-up communication with the buyer's journey stage, based on their content consumption patterns and engagement signals.

WHY IT MATTERS

Your buyers aren't all in the same mindset. Someone downloading a white paper isn't ready for a demo. Mapping messaging to funnel stage ensures you:

- Respect the buyer's intent
- Avoid premature or aggressive outreach
- Increase engagement by meeting leads where they are

HOW NETLINE MAKES THIS EASY

NetLine tags every campaign asset by title and format during setup. This helps you better understand:

- Where the buyer likely is in their journey
- What content they've engaged with
- How to position your next message accordingly

Pair these insights with custom question data (timelines, challenges, tech stack) to deliver laser-focused messaging.

NETLINE INSIGHTS

Your content already signals intent. Your messaging should echo that signal. When your emails feel like a continuation of the buyer's journey (not a reset), response rates can soar.

STEP 3: MAP MESSAGING TO FUNNEL STAGE (CONTINUED)

The right message means nothing if it lands at the wrong time.

MESSAGING FRAMEWORK BY CONTENT AND FUNNEL STAGE

Use this matrix during campaign setup to pre-tag assets by fnnel stage. This will power your segmentation, messaging, and follow-up logic in later steps.

FUNNEL STAGE	BUYER MINDSET	CONTENT TYPES	MESSAGING APPROACH
TOFU	"I'm exploring the problem."	Guides, eBooks, How-To Checklists, Intro Videos	• Focus on problem identification • Share industry insights • Establish thought leadership • Avoid direct selling
MOFU	"I'm evaluating possible solutions."	Case Studies, Industry Reports, Buyer's Guides, Webinars	• Address specific pain points • Provide social proof • Share implementation insights • Begin solution positioning
BOFU	"I'm ready to make a decision."	ROI Tools, Product Comparisons, Demos, Technical Content	• Direct solution alignment • Specific value propositions • Clear next steps • Strong calls to action

EXAMPLE MESSAGING BY STAGE AND BUYER ROLE

	TOFU	MOFU	BOFU
Asset	"2024 State of Remote Work: The IT Security Edition" (eBook)	"How [Healthcare Company] Cut Onboarding Time by 42%" (Webinar)	"ROI Calculator: Estimate Your Cost Savings with [Product]."
Buyer	IT Manager	HR Director	VP of Finance
NetLine HQL Response	"Thanks for checking out our 2024 Remote Work guide. If you haven't yet, I recommend checking out Pg. 4 for a deeper dive on [topic]. Also, here's a short checklist on key security pitfalls to avoid; perfect for teams exploring updated protocols."	"Top priority: streamlining new hire training." "Thanks for registering for our webinar. If you haven't yet, I recommend checking out 13:00 for a deeper dive on [pain point]. You also mentioned onboarding is a priority. Here's how one company tackled it and what you might take away from their approach."	"Timeline to purchase: 3-6 months; currently evaluating vendors." "I saw you used our ROI calculator. Hope it was useful. Would you be open to walking through your inputs to see how our numbers compare? In the meantime, here's a case study showcasing how one of our clients achieved their goals with [solution]."
Next Touch Suggestion	MOFU asset with benchmark data or peer trends.	Invite to an upcoming webinar or share product guide.	Direct call from AE or calendar link to book a meeting.

STEP 4: DESIGN NURTURE SEQUENCES THAT CONVERT

Don't chase. Guide. Every email should feel like the buyer's next best step.

WHAT IT IS

A purposeful series of emails that deliver relevant value at each stage of the buyer's journey; built to educate, qualify, and convert based on behavior and business context.

WHY IT MATTERS

Spray-and-pray doesn't convert. Nurture sequences work when they reflect what buyers care about.

A well-structured nurture sequence:

- Increases engagement and response rates
- Builds momentum with helpful, timely messaging
- Keeps your brand top-of-mind without overwhelming buyers
- Softens the path to sales for better conversions

HOW NETLINE MAKES THIS EASY

Each NetLine lead gives you:

- Content engagement context (asset title, format, funnel stage)
- Behavioral intent signals (when and what they consumed)
- Firmographic filters (job level, company size, industry)
- Custom responses, either optional or required (e.g., budget timeline, challenge, pain point)

This data helps you:

- Match messaging to funnel stage
- Customize cadence and depth
- Route leads into the right sequence from day one

NETLINE INSIGHTS

The best nurture sequences don't feel like campaigns. They feel like conversations. Use behavior, timing, and context to move buyers forward, not just follow up.

STEP 4: DESIGN NURTURE SEQUENCES THAT CONVERT (CONTINUED)

Don't chase. Guide. Every email should feel like the buyer's next best step.

EXAMPLE NURTURE TRACK MATRIX

Below, you can see different nurture tracks based on funnel stage.

	TOFU TRACK	MOFU TRACK	BOFU TRACK
Wait Time	48-72 hours	24-48 hours	<24 hours
Email 1	**Add Value:** Share related guide	**Add Value:** Share industry benchmark	**Add Value:** Share use case or checklist
Email 2	**Educate:** Address a macro trend	**Frame the Pain:** Talk about common blockers	**Frame the Problem:** Tie challenge to solution
Email 3	**Light Ask:** "Want more insights?"	**Light Ask:** "Want to compare approaches?"	**Stronger Ask:** "Open to a quick call?"
Trigger Condition	Downloaded TOFU asset	Downloaded MOFU asset	Downloaded BOFU asset or answered qualifying question
CTA Strength	Soft	Medium	Direct

NURTURE STRATEGY BEST PRACTICES

LEAD WITH RELEVANCE

Use content engagement and job role to tailor tone and CTA.

RESPECT THE CONSUMPTION GAP

Wait 48-72 hours before first touch for TOFU content; act faster for BOFU.

TRIGGER BY FUNNEL STAGE

Set up separate nurture tracks based on NetLine's funnel-aligned asset tags.

SHORTER SEQUENCES > LONGER DRIPS

2-4 emails work best for mid- to bottom-funnel leads; no need to over-engineer.

USE DYNAMIC CONTENT WHERE POSSIBLE

Personalize by industry, company size, or persona; especially at scale.

PRO TIP

Use NetLine's mapped fields (e.g., Job Level, Industry, Custom Question) to automatically sort leads into nurture tracks A/B/C. High-scoring leads may skip nurture altogether and go straight to SDR outreach.

STEP 5: EMPOWER SALES WITH CONTEXTUAL LEAD DELIVERY

Don't just pass leads over. Deliver the context that drives conversion.

WHAT IT IS

A unified process for equipping your sales team with the insights, timing, and tools they need to act on marketing-sourced leads; without second-guessing fit, intent, or next steps.

WHY IT MATTERS

Sales doesn't need more names; they need better signals. If leads show up in the CRM without context, reps stall, overpitch, or ignore them entirely.

When you deliver leads with full visibility into what they did, why they matter, and how to follow up, you:

- Build trust between sales and marketing
- Reduce time to first touch
- Improve lead-to-opportunity conversion rates
- Create a better, more relevant buyer experience

HOW NETLINE MAKES THIS EASY

NetLine delivers leads with the kind of context sales teams wish they always had; automatically, in real time, and ready for action:

- **What they did:** Asset title, funnel stage, content topic, and timestamp of engagement.
- **Who they are:** Job Level, Company Size, Revenue, Industry; all fully mapped for prioritization.
- **Why it matters:** Custom responses like project timeline, challenges, or current tools.
- **Where they came from:** Campaign metadata that tells sales exactly how and why the lead entered your funnel.
- **How they arrive:** Delivered instantly. No formatting, no friction.

NETLINE INSIGHTS

Sales enablement isn't just access to leads. It's access to insights. When you deliver real buyer context, you don't just enable reps to follow up; you empower them to close.

STEP 5: EMPOWER SALES WITH CONTEXTUAL LEAD DELIVERY (CONTINUED)

Don't just pass leads over. Deliver the context that drives conversion.

SALES-READY LEAD SNAPSHOT

Use this format to brief reps or build directly into your CRM view. Ensure every lead handoff to sales is ready for follow-up, not rework.

FIELD	WHY IT MATTERS
Name, Title, Company	Confirms role fit and account relevance
Content Downloaded + Date	Reveals interest area and recency of engagement
Funnel Stage	Aligns tone and CTA with buyer readiness
Custom Question Responses	Uncovers urgency, challenges, or budget insights
Firmographics	Helps prioritize by size, vertical, and job role
Campaign Source	Gives sales full visibility into lead origin
Suggested CTA Prompt	Gives reps a ready-made opener; no guesswork required

PRO TIPS FOR SALES REPS

GET A RUNNING START:

Add a custom field in your CRM (e.g., "First Touch CTA") with pre-written prompts based on asset type and funnel stage.

LEAD WITH RELEVANCE:

Mention the content they downloaded, then offer something additive (e.g., case study, checklist, stat).

"Saw you downloaded our compliance guide. Here's a quick checklist that expands on it."

RESPECT THE FUNNEL STAGE:

Don't pitch a demo to someone who just read a guide. Build the relationship first.

USE NETLINE DATA IN YOUR EMAIL:

"You mentioned [challenge]. That's something we've helped others solve with [brief solution]. Want to explore what that could look like for your team?"

TOP 6 LEAD NURTURE MISTAKES TO AVOID

Even the best systems fall short if these common missteps go unchecked.

PITCHING TOO EARLY

Always offer value first. Let buyer behavior signal when to invite action.

TREATING ALL LEADS THE SAME

Segment and personalize based on behavior, funnel stage, and role.

RELYING TOO HEAVILY ON EMAIL

Add display, social, chat, and remarketing to build a true multi-channel experience.

GIVING UP ON "COLD" LEADS

Re-engage thoughtfully. Not now ≠ not ever.

EQUATING JOB TITLE WITH BUYING POWER

Treat every lead as a potential influencer, not just the decision maker.

NOT CONNECTING NURTURE TO SALES OUTCOMES

Go beyond clicks. Let sales outcomes and CRM data guide ongoing improvements.

FINAL CHECK: IS YOUR NURTURE STRATEGY READY?

Before you hit launch, make sure your nurture engine is built to perform.

Run this checklist every time you build a new campaign or adjust your lead filters.

A consistent setup = scalable, reliable nurture success.

STRATEGY & STRUCTURE

- ☐ Have you tagged each NetLine lead by funnel stage at setup?
- ☐ Is your lead scoring model factoring in both firmographics and behavioral signals?
- ☐ Do you have at least two nurture tracks tailored by stage, persona, or industry?

MESSAGING & CADENCE

- ☐ Are nurture emails triggered by behavior, not fixed schedules?
- ☐ Are you using content format + topic to adjust tone, message depth, and CTA strength?
- ☐ Are you leveraging custom question responses from NetLine to personalize your messaging?

SALES ENABLEMENT

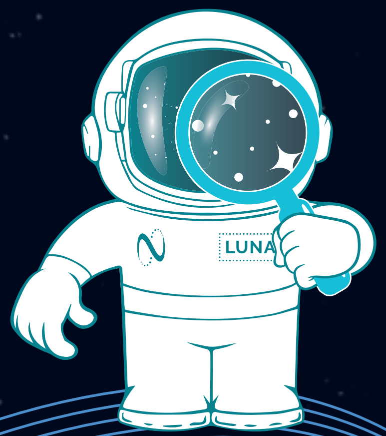
- ☐ Are marketing and sales aligned on handoff triggers, timing, and lead routing criteria?
- ☐ Does sales receive a complete lead snapshot with asset info, persona data, and campaign context?

ACTIVATION & RE-ENGAGEMENT

- ☐ Have you set up real-time lead delivery from NetLine into your CRM or MAP?
- ☐ Are leads activated across email and paid media (e.g., display, social, retargeting)?
- ☐ Do you have a re-engagement sequence for cold or inactive leads?

THE LEAD NURTURE CHECKLIST

Your step-by-step, ready-to-use checklist to ensure every aspect of your nurture strategy, from setup to follow-up, is aligned and activation-ready.



STEP 1: DEFINE YOUR FOLLOW-UP POLICY

Goal: Align marketing and sales on lead scoring, routing, and timing.

- ☐ Score leads by Job Level, Industry, Size, Revenue
- ☐ Map content type/topic to funnel stage
- ☐ Route to Sales or Nurture using urgency/custom responses
- ☐ Set handoff triggers in CRM/MAP for real-time routing
- ☐ Connect NetLine to CRM/MAP (e.g., Salesforce, HubSpot)

OPTIONAL

- ☐ Start broad; refine filters after 3–5 days
- ☐ Add custom questions to segment deeper

> **NETLINE TIP**
>
> Custom questions + HQLs fuel advanced segmentation and personalization.

STEP 2: AUTOMATE OUTREACH WITH NETLINE SIGNALS

Goal: Use real-time behavior and firmographics to trigger relevant nurture at scale.

- ☐ TOFU: Wait 48–72 hrs before outreach
- ☐ BOFU/Webinar: Respond within 24 hrs
- ☐ <48 hrs? Send light-touch email (not a pitch)
- ☐ Segment nurture by asset type, topic, funnel stage
- ☐ Route by custom responses (e.g., timeline, challenge)
- ☐ Map NetLine fields (e.g., Job Level, Campaign Title) to MAP/CRM
- ☐ Score leads by velocity + engagement depth

OPTIONAL

- ☐ Skip nurture for high-fit, high-engagement leads
- ☐ Add fallback rules for inactive leads
- ☐ Push nurture track into CRM for SDR visibility

> **NETLINE TIP**
>
> Real-time delivery keeps nurtures responsive and relevant.

STEP 3: MAP MESSAGING TO FUNNEL STAGE

Goal: Align your messaging tone, CTA, and content based on buyer readiness.

☐ Tag assets by funnel stage at campaign setup

☐ Align follow-up by stage:

- TOFU: Educate and add value
- MOFU: Frame the problem and build trust
- BOFU: Drive meetings or conversions

☐ Treat nurture as a continuation of the download

OPTIONAL

☐ Personalize by buyer role or asset type

☐ Reference custom questions for relevance

NETLINE TIP

Funnel-stage tagging drives accurate segmentation and messaging.

STEP 4: DESIGN NURTURE SEQUENCES THAT CONVERT

Goal: Deliver short, focused, behavior-based email flows that move buyers forward.

☐ Create separate tracks for TOFU, MOFU, BOFU

☐ Start with a 3-email framework:

1. Add Value (checklist, guide, stat)
2. Frame the Problem (contextual insight)
3. Offer Support (soft CTA or meeting)

☐ Personalize by role, vertical, or pain point

☐ Match timing to funnel stage:

- TOFU = 48–72 hr wait
- MOFU = 24–48 hr wait
- BOFU = <24 hr response

☐ Keep nurture short (2–4 emails max)

OPTIONAL

☐ Use dynamic content for scale

☐ Set fallback re-engagement logic

☐ Use scoring to fast-track active leads

NETLINE TIP

Firmographics + content type = dynamic personalization at scale.

STEP 5: EMPOWER SALES WITH CONTEXTUAL LEAD DELIVERY

Goal: Arm sales with the full context to follow up fast and confidently.

☐ Deliver leads with:

- Name, Title, Company
- Asset Downloaded + Funnel Stage
- Custom Question Responses
- Campaign Metadata
- Job Level, Revenue, Industry

☐ Include suggested CTAs or openers

☐ Align outreach to funnel stage (e.g., no demos for TOFU)

☐ Highlight pain points from custom responses

OPTIONAL

☐ Add “First Touch CTA” field to CRM

☐ Push nurture activity into CRM view

NETLINE TIP

Use campaign + asset metadata to craft smarter, trust-building outreach.

TOP 6 LEAD NURTURE MISTAKES TO AVOID

PITCHING TOO EARLY

Offer value before asking for time.

TREATING ALL LEADS THE SAME

Segment by behavior, not just content type and title.

OVER-RELYING ON EMAIL

Add chat, social, remarketing, and display.

DISCARDING COLD LEADS

Re-engage with fresh value, not silence.

IGNORING INFLUENCERS

Other titles drive decisions, too.

MEASURING THE WRONG THING

Look past opens; track meetings and pipeline.

FINAL CHECK: IS YOUR NURTURE STRATEGY READY?

Before you launch, run this quick audit.

Run this checklist every time you build a new campaign or adjust your lead filters. A consistent setup = scalable, reliable nurture success.

STRATEGY & SETUP

- ☐ Are leads tagged by funnel stage at setup?
- ☐ Does scoring combine persona and behavior?

SALES ENABLEMENT

- ☐ Are sales and marketing aligned on routing and timing?
- ☐ Does sales receive full lead context and messaging prompts?

MESSAGING & CADENCE

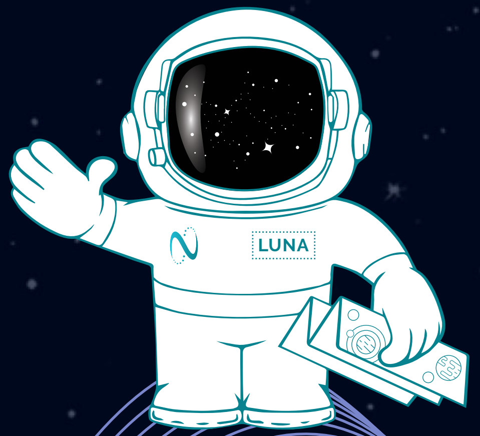
- ☐ Are emails triggered by behavior, not just date?
- ☐ Are custom questions informing follow-up?

ACTIVATION & RE-ENGAGEMENT

- ☐ Is real-time lead delivery connected to your MAP/CRM?
- ☐ Are leads nurtured across multiple channels (not just email)?
- ☐ Is there a plan for cold leads to re-enter nurture?

THE LEAD NURTURE TIP SHEET

Your punchy, quick-reference resource packed with tactical tips, best practices, and golden rules to help you move fast and nurture smarter.



STEP 1: ALIGN BEFORE YOU AUTOMATE

Build your follow-up policy before leads hit your CRM.

QUICK TIPS

- **Score leads** by Job Level, Industry, Size, and Revenue
- **Map assets** to funnel stage using content type + topic
- **Route leads** to Sales or Nurture based on urgency
- **Create handoff rules** inside your CRM or MAP

GOLDEN RULE

If Sales and Marketing aren't aligned, your leads will stall.

Enable NetLine custom questions to uncover challenges, timelines, and tools.

STEP 2: BEHAVIOR = YOUR TRIGGER

Automate nurtures using real-time buyer behavior.

QUICK TIPS

- **TOFU:** Wait 48-72 hrs before outreach
- **BOFU:** Follow up within 24 hrs
- **Trigger SDR or nurture** from custom question responses
- **Map key fields** (e.g., Job Level, Campaign Title) to your MAP/CRM
- **Score hot leads** based on velocity (e.g., 3 assets in 3 days = 🔥)

GOLDEN RULE

Let behaviors, not timelines, trigger follow-up.

Connect NetLine to your MAP + CRM to engage the moment intent shows.

STEP 3: MATCH MESSAGE TO MINDSET

Align tone, CTA, and value with funnel stage.

QUICK TIPS

- **TOFU:** Send helpful, educational content
- **MOFU:** Offer insights or solution context
- **BOFU:** Ask for demo, ROI calc, or meeting
- **Personalize messaging** by role, vertical, or challenge
- **Reference custom responses** to boost relevance

GOLDEN RULE

Send the right message to the right mindset.

Tag every campaign asset by funnel stage for smarter segmentation.

STEP 4: GUIDE, DON'T CHASE

Every message should feel like the next best step.

QUICK TIPS

- **Use 2–4 emails** per nurture track
- **Structure your flow:**
  1. Add value
  2. Frame the pain
  3. Offer support
- **Trigger emails** by funnel stage + behavior
- **Set re-engagement paths** for cold leads
- **Use dynamic content** when personalizing at scale

GOLDEN RULE

A nurture shouldn't feel like marketing. It should feel like momentum.

Auto-sort leads into TOFU/MOFU/BOFU tracks using NetLine fields.

STEP 5: HAND OFF WITH CONTEXT, NOT A GUESS

Give sales the story, not just a name.

QUICK TIPS

- **Include with every lead:**
  - What they downloaded
  - When they engaged
  - Who they are (firmographics)
  - Why it matters (custom responses)
- **Add campaign source** and suggested CTA
- **Push nurture notes** into CRM view

GOLDEN RULE

Sales doesn't need more names.
They need better signals.

Every NetLine lead includes funnel stage + asset metadata.
Use it to personalize.

AVOID THESE MISTAKES

PITCHING TOO EARLY

TREATING ALL LEADS THE SAME

OVER-RELYING ON EMAIL

DISCARDING COLD LEADS

IGNORING INFLUENCERS

MEASURING THE WRONG THING

FINAL NURTURE READINESS CHECK

Use this before launching any nurture program.

STRATEGY & SETUP

- ☐ Leads tagged by funnel stage
- ☐ Scoring blends firmographics + behavior

SALES ENABLEMENT

- ☐ Sales/Marketing aligned on handoff rules
- ☐ Sales receives full lead snapshot

MESSAGING & CADENCE

- ☐ Emails triggered by actions, not dates
- ☐ Custom questions inform messaging

ACTIVATION & RE-ENGAGEMENT

- ☐ NetLine leads delivered in real-time to MAP/CRM
- ☐ Channels activated: email, display, social, retargeting
- ☐ Cold leads routed to re-engagement tracks

ABOUT NETLINE

NetLine is the leading Programmatic B2B Lead Generation Platform, empowering marketers to engage in-market buyers with targeted content and accelerate revenue growth. With unmatched access to over 15 thousand Tier 1 media sites, NetLine connects brands with decision makers actively researching solutions—delivering content where and when it matters most.

Trusted by over 17,000 customers to turn content into pipeline, NetLine is the leader in demand generation. Always-on content across the digital publications your target audiences trust fosters true organic engagement. First-party data, advanced targeting, and real-time lead delivery generate only high-quality prospects for immediate activation and faster conversions.

Founded in 1994 now part of Informa TechTarget, NetLine provides unparalleled access and transparency, helping marketers cut through the noise and connect with the buyers who matter most.

Your buyers are everywhere. Now you can be, too—all in one platform.

LEARN MORE AT WWW.NETLINE.COM