JTF MARKETING

EUROPE'S PLAIN TALKING MARKETING AUTOMATION CONSULTANCY



GATING CONTENT: YOUR BEST PRACTICE GUIDE

For Skyrocketing Your Strategy

www.jtfmarketing.co

INTRODUCTION

The practice of gating (requiring information from the viewer in exchange for access to content) has become ubiquitous. This is unsurprising, given the potential results: *Digital Marketer*, for instance, reported that their gated "Guide to Social Media Headlines" converted at 45.2% and delivered 23,735 new leads in 45 days.

On the other hand, many marketers are turning away from gating. Conversion expert Neil Patel uses a few forms to gate some of his content, but most of his top content is available ungated.

So how can you tell when it's a good idea to use gating - and when will it hurt you more than it helps?

In this guide, we'll talk you through the latest in gating best practice. We'll take a look at how to get the most out of gating - and when it would be better to steer clear. We'll also cover different types of gating techniques, including soft and hard gating. Finally, we'll take you through the best way to automate your lead captures to get a bigger ROI on your gating campaigns.

LONDON
201 Borough High Street
London, SE1 1JA, UK
Tel: +44 203 355 6890

MADRID
Paseo de la Castellana, 77,
28046 Madrid España
Tel: +34 91 9010 315

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THE BENEFITS OF GATING - AN OVERVIEW

As gating has become more and more prevalent, the practice has earned some backlash: **as far as some marketers go, no content should ever be gated.** In his book *The Content Code,* Mark Schaefer makes a compelling case for abandoning the practice of gating.

Schaefer argues that, in today's content-saturated market, the economic value of content is in being seen - and anything, gating included, that "places a stop sign in front of your content flow" is therefore a glaring mistake.



Roger Dooley adds a neuroscientific spin on the anti-gating movement. Whereas gating is based on a rewards system (i.e. "Give us your data and in exchange we will give you some valuable content"), Dooley demonstrates that a reciprocity model can capture up to twice as many leads (i.e. "Here is some valuable content - please can we ask you for your data now that you trust us?")

However, while gating shouldn't be overused, the strategic use of gating can generate great results for most marketers without irritating your target customers.



Let's talk about the benefits!



THE BENEFITS OF GATING

Building trust

Gating your content helps you build a stronger relationship with your leads. As *Copyblogger's* chief copywriter Demian Farnsworth notes:

> *"Holding something back identifies those who are more serious. The blog post draws in a crowd and builds trust – the download indicates someone wants more information. If it's a valuable download, more trust is accumulated."*

By gating content, you promise value to your lead. When you deliver that value, they learn that you are worth trusting.

Increasing lead generation

The kind of content that performs well behind a gate (high-value, well-informed thought leadership) is often called a **"lead magnet."** High-quality content establishes your company as a trusted industry authority, and draws leads into visiting your site and spending time looking around. They may come for the gated content - but they'll leave with a clear idea of who you are and how you could help them solve their problems.



Higher lead quality

Fewer leads may download gated content - but those who download have already **pre-qualified** themselves and shown their interest through their willingness to provide their data to you. For Hubspot CEO Mike Volpe, it's all about the bottom line: "If I can get 100,000 people to see that page and I can get 28,000 people to fill out [a form], 28,000 contacts may be more valuable than even 50,000 people seeing the content," he explains.

Massive lead conversion rates

Well-positioned gated content can pack a **huge ROI punch**. For instance, *Single Grain's* ebook on digital marketing brought in 50 leads a week and netted a conversion rate of 19%.

Their secret? According to Tom Lambert, *Single Grain's* Director of Paid Acquisition, it was a combination of content that pre-qualified their prospects, copy that generated curiosity about the content, and a gentle 2-stage opt-in process that ensured they had full permission to contact leads. They followed up with an auto-responder email sequence which contained a low-hassle pitch in the PS section - and saw the results pour in.

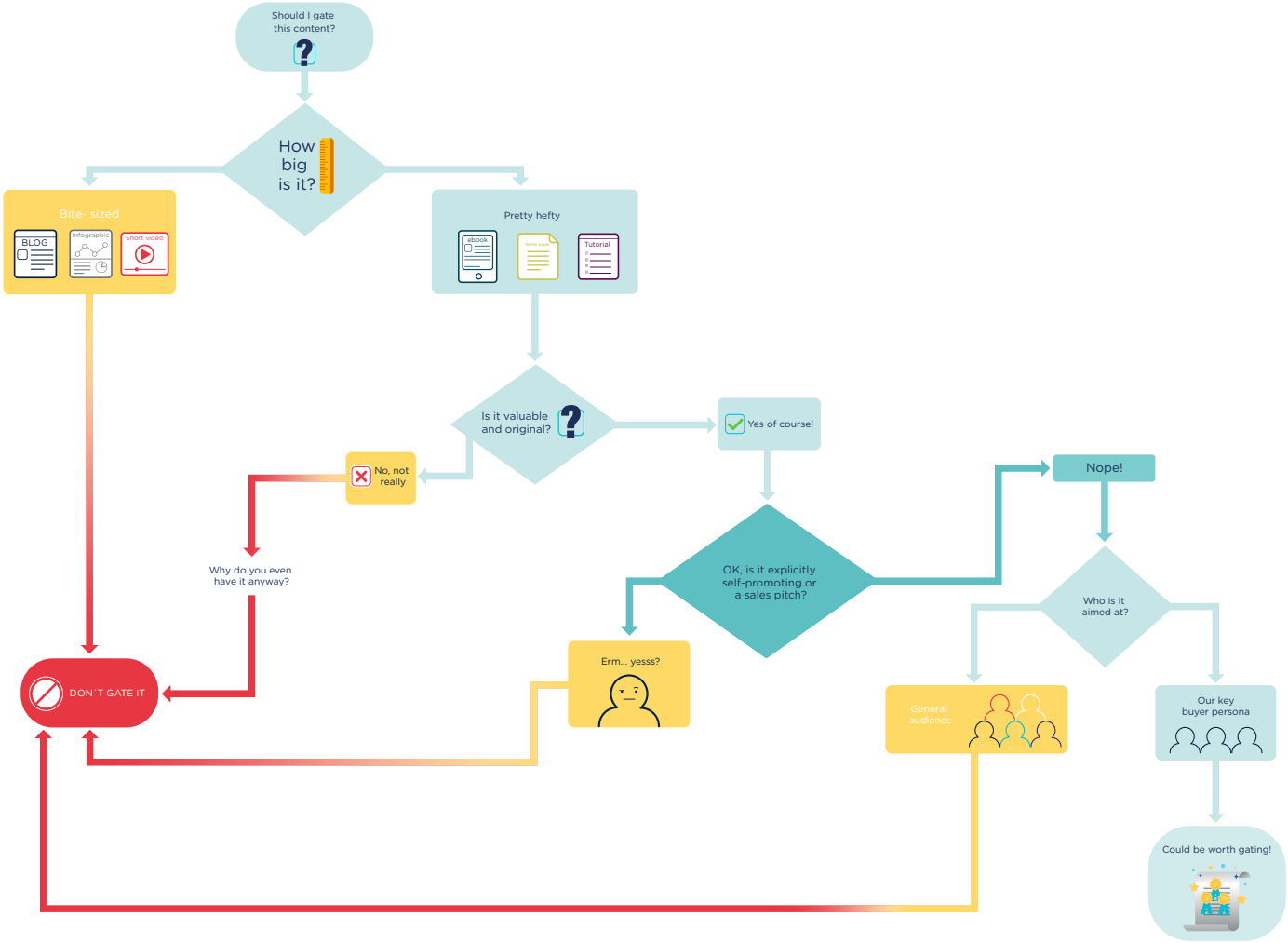


TO GATE OR NOT TO GATE?

To gate or not to gate? That is the question. (We know, it's cheesy. But we couldn't help the Hamlet reference. You can't blame us, right?).

Visual Guide: To Gate or Not To Gate?

Cheesy title aside, here's a nice simple rule of thumb to follow: **if in doubt, don't gate.** If you'd like a little bit more subtlety than that, check out our handy flow-chart:



Easy, right? Well, not quite. Let's go deeper into what you need to consider before gating yoy content.

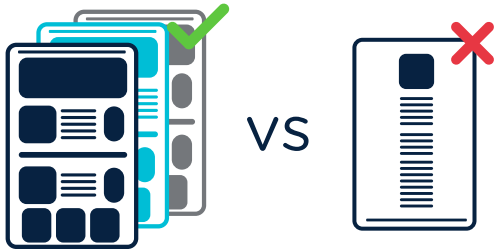


BEFORE YOU GATE YOUR CONTENT: 3 POINTS FOR CONSIDER

When it comes to gating, it can be tricky to set hard-and-fast rules. Nonetheless, there are **three basic points** to think about as you weigh whether or not gating a specific piece of content would be appropriate:

1) Take an objective look at the value of the content

Gating only works if your leads feel that **your content is worth their data.** If you break the contract at this point, you can risk permanently damaging your brand. Gated content must be original, valuable, and well-written. Downloading it should provide your prospect with real, tangible information that can be applied immediately.



Content that performs well behind a gate includes “Ultimate Guide”- style ebooks, original research, or detailed tutorials. Thinly disguised sales pitches will make you look desperate; flimsy, short copy better suited to a blog post will make you seem as though you have nothing to say.

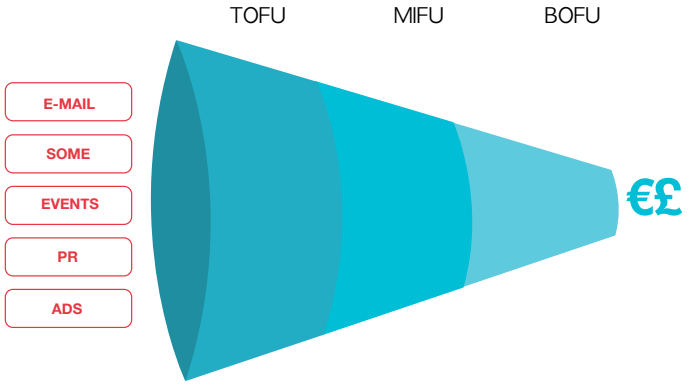
2) Consider where your lead is in the buyer’s journey

To decide whether something is worth gating, think about **who the content is for** and **where they might be on the user journey:**

Top-of-funnel content is not usually best suited to gating, although this may vary depending on your market and the length of buyer decision-making. Blog posts and curated content are not usually suitable for gating: you simply haven’t built enough of a relationship with the lead to start asking for their data.

Someone further down their buyer’s journey with you might well be interested in a longer thought-piece like a white paper or ebook, or a helpful checklist or guide - and at that point, gating may well work out fine.

Bottom-of-funnel content like product demos, cost estimations, and webinars are ideal for gating; by this point, the prospect has demonstrated a strong interest in your company and may just need one more piece of content to nudge them over the edge.



3) Check out what your competition is doing

If everyone in your market is gating their content, you can feel more confident that your prospects are resigned to being asked for data, and take a chance on them downloading your gated content.

On the other hand, of course, giving away content for free might be a great way to stand out from the crowd. In the saturated arena of marketing gurus, Neil Patel has made himself into a top influencer - mainly by **not** gating when everyone else is.



GATING BEST PRACTICE - OUR TOP 5 TIPS

So, let's say you have put your piece through its paces, asked all the questions in our "To Gate or Not To Gate" visual guide, and are confident that your piece is worth gating. Congratulations!

Now, you'll need to have a **strategy** in place to make gating worth your while so your piece can perform as well as possible. And you'll have to decide if you want to place your content behind a **soft gate** (where prospects are asked for their details but can continue reading without providing them) or a **hard gate** (where prospects must provide their details to continue reading the piece - don't worry, we'll cover this in a bit!)

Think about what **success** would be. Would you consider the piece successful if your lead:

- Filled out a form?
- Subscribed to your content?
- Asked to be contacted by a team member?

Thinking about this will be crucial for your distribution strategy (on which more later), but it's also important to begin posing those questions at this stage so you can get your marketing house in order, so to speak, for distribution.

Read on for our top five tips for making sure that you see ROI on gated content.





GATING BEST PRACTICE - OUR TOP 5 TIPS (CONTINUED)

1. Optimise your landing page

For gated content to perform, you need to reassure the lead that they have come to the right place. Remember that you are not selling your end product or service - at this point, you are simply selling the gated content. Demonstrate the benefit that the prospect will receive by downloading the content and make your call to action (CTA) clear and compelling.

It goes without saying that you also have to deliver on that promise! Nothing will put off your prospects more than handing over their email details, only to find that the content they receive is a re-wording of an existing blog post and a few stock images.

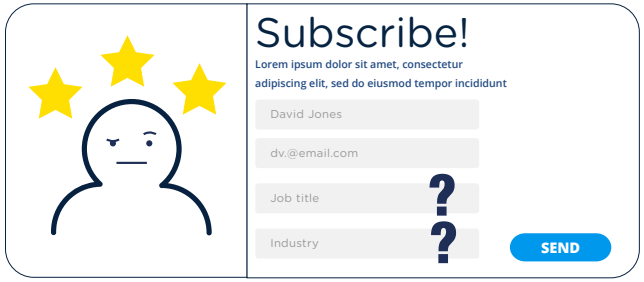
Make sure you express, up front, the benefits of the piece so your reader knows they have come to the right place and continues reading. Barry Feldman, Creative Director of Feldman Creative, sums it up:

> *"From what I've seen, I'd say the top two mistakes companies make are not assuring the visitor he or she has come to the right place, and not clearly communicating the benefits of completing the form. You need to expressly say what the result of doing so will be."*

2. Pre-qualify your leads

You might also want to consider pre-qualifying leads **before** they download the content. After all, the point of gating your content is to improve your lead quality by filtering and targeting leads who have a proven interest in what you have to say. Therefore, it would be a pity to drum up lots of new email addresses, only to realise that they belong to people outside your target market. Not only would you be targeting the wrong group of people, you could turn off potential leads by giving them content that is not useful to them.

Pre-qualifying your leads at this stage shouldn't be difficult. Think about doing so by **creating a slightly longer opt-in form**, or by spelling out who your content will benefit in your landing page copy.



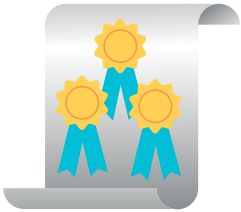




GATING BEST PRACTICE - OUR TOP 5 TIPS (CONTINUED)

3. Design the full process like a miniature product launch

To make gating work, **think of your gated content as a new product.**



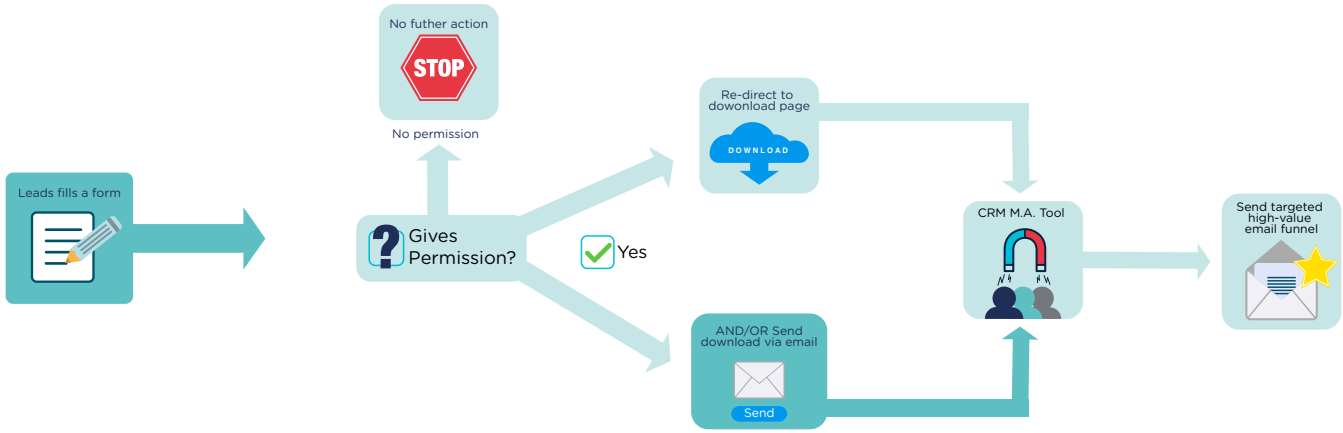
First of all, make sure that your audience will value this content and create it to the highest possible standards. Engage the best creatives on your team and give it the design time and editing necessary to make it stand out.

Then, consider the logistics of how you will deliver it. Will you send a link via email? Will you provide an immediate download link - with or without an additional email? Will you redirect people to a new page?

Finally, promote the daylights out of the content! Treat it like the valuable asset that it is and present it to your audience with confidence. Depending on your target market, free gated content tends to perform well on social media and in native ads.

4. Plan your campaign follow-up

To get the most out of your gating campaign, develop a clear idea of what you're going to do with your leads once you've got them. At the very least, you should be sure to **plan some kind of follow up** - even if just a courtesy email to thank them for their interest. You might want to plan an email campaign or a nurture campaign for each new piece of gated content, or feed your content into existing campaigns.



5. Don't forget - get consent!

A reminder: No matter how you proceed with these leads, **make sure that you have asked your prospects for permission** to take the next steps, such as sending them additional emails and asking them to give you their consent to receive your communications. Data protection regulations vary by region, so check to make sure your policies comply with regulations where you - and your leads - are based.



GATING FORMS: WHAT YOU SHOULD ASK

As with all things gating-related, forms are controversial. You have to **strive for a balance** between asking for too much information and leaving data on the table. Ask too many questions, and you'll not only annoy your leads, you'll risk raising the bar for your content impossibly high. Don't ask enough questions, and you might find that the leads you've generated don't fit your key buyer personas.

At a minimum, you'll need a **first name** and an **email address**. It's always a good idea to tell people precisely what you're planning to do with these - nobody likes a spammer! This can be a good place to add a testimonial, greeting, or "about us" module with a photo; it reminds the reader that behind this piece of content are a group of trustworthy human beings who will look after their data and respect their privacy.

Here's a nice example from *Digital Marketer:*

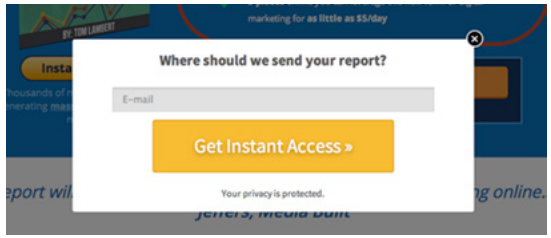




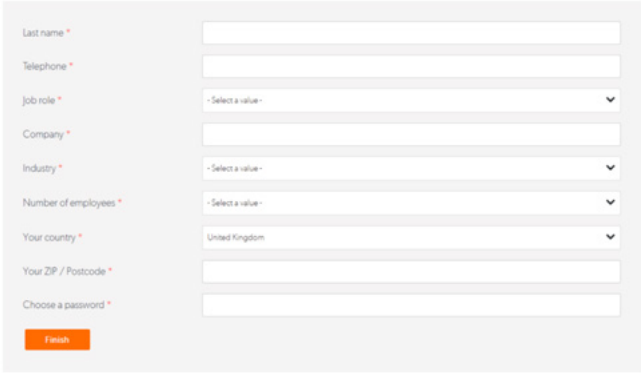
GATING FORMS: WHAT YOU SHOULD ASK (CONTINUED)

Beyond requiring the minimum information, it's up to you what you decide to ask for. A name and an email address (or just an email address) should be enough for many of your campaigns. After all, if your content is well-positioned, your leads have pre-filtered themselves simply by showing an interest in downloading it. For instance, to return to the *Single Grain* campaign, only digital marketers interested in new ideas about marketing would download the ebook.

Their form can therefore be very short and sweet:



However, if you think the content has really high value, or you have an established reputation that can back up a bigger ask, you can go all out. *B2B Marketing* requires a full registration for downloading gated content, including a long form that includes your phone number, company name and size, job title, and even industry:



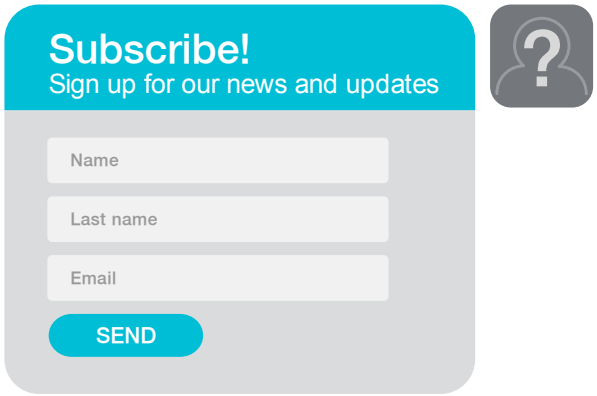


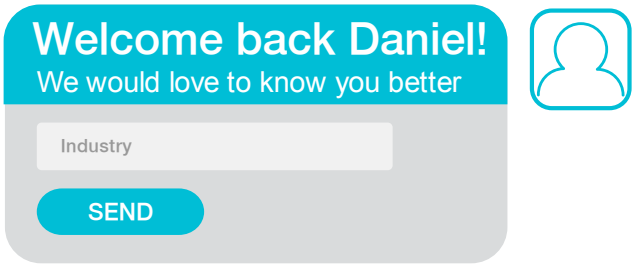
GATING FORMS: WHAT YOU SHOULD ASK (CONTINUED)

Essentially, it comes down to value and strategy. How much data is your content worth? And what is your priority - getting to know your customers, or maximising your downloads?

One thing to keep in mind is that you may not need to ask for all the information you want to get from your leads in one fell swoop. With a marketing automation platform, you can **progressively profile** your leads: each time a visitor fills out a form on one of your pages, cookie tracking recognizes them and allows you to replace form fields that you have collected with new fields for your lead to fill in.

Say, for example, the lead has never visited your site. You could ask for their name and an email address on the form. If they have visited your site once or twice, you could ask for their job title and industry; you won't need to ask for their name or their email address since that information has already been provided.



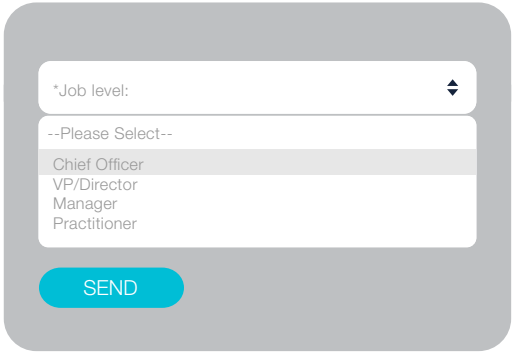


As the **frequency** of contact increases, so can the **depth of information** you request. For example a lead who has visited your site many times could be asked to provide company name and size. As the visitor will only be filling out one or two form fields each time, they are much likelier to agree to provide the information you need, and you'll be better able to build up their profile so you can qualify them over time.

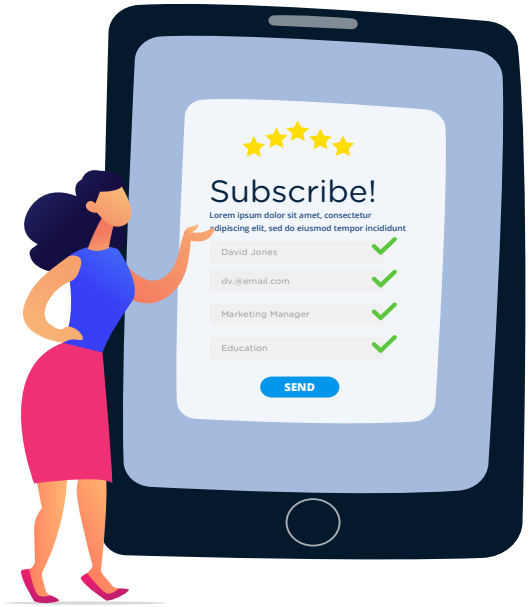


IMPROVING DATA QUALITY

60% of marketers state that collecting the correct lead information is their biggest challenge. Therefore, your gating strategy will need to take into account how to avoid getting fake details?" Unfortunately, some level of false information is inevitable when it comes to gating. However, you should be able to limit false information significantly by setting up your form to require a minimum character length and correct input format.



This can be easily done with a marketing automation platform by providing picklists for some fields (pull-down options for your leads to select their choice), automating input format, or providing hint text in your forms.
Don't forget to consider your lead's mobile experience when providing these input format aids! Picklists can be tricky to use on mobile devices, so make sure that they are truly the best option for that field and stick to a reasonable number





SOFT VERSUS HARD GATES - WHICH GATE IS RIGHT FOR YOU?

It's worth bearing in mind that **gating doesn't have to be a yes or no proposition**. There are a variety of different types of gates that you can use, depending on your **market**, your **strategy** and the **kind of content** you're working with.

- Hard gates prevent someone from accessing the content unless they provide you with required information
- Soft gates ask people to enter their information, but won't block the lead from access to the content if they decide they don't want to hand over their data

There's no doubt that you can collect more useful data from your lead if you implement a hard gate. If that feels a little bit too aggressive (but you'd still like to increase your chances of collecting useful lead data from your best content) you could try a soft gate. Using a soft gates can be a highly effective way of collecting user data without coming across as irritating or pushy.

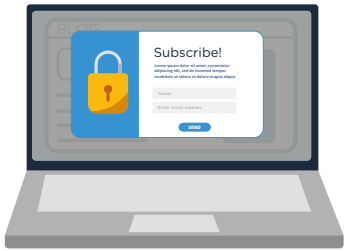
Here's an example of what that soft gate might be:

- A prospect visits your website and starts reading a long-form piece of content.
- Half-way through the piece, a soft gate pops up - they are asked for their email address to sign up for similar content, but they can ignore the request and continue to read your content.



Here's an example of what that hard gate might be:

- A prospect visits your website and starts reading a long-form piece of content.
- Half-way through the piece, a hard gate pops up - they are asked for their email address to continue reading your content. They will fill out their name and email, and you'll verify it with an email thanking them for the information and providing the piece they were reading in its entirety. The prospect won't be able to keep reading the piece unless they provide the information requested.



Keep in mind that many people who are enjoying a useful piece of content will feel comfortable sharing their email address. They know that they will get more content that they find useful directly in their inbox - and by providing a hard gate where they must enter information and agree to receive communications from you, your leads will give you permission to continue sending content their way. This will hopefully bring them further along on their buyer journey.

Gating need not be done solely within a single piece of content! You might also gate the number of times a lead can access your content before you gate it from them and require a form fill-in. A good example of the effectiveness of this kind of gating might be the *New York Times*. By allowing readers 5 free articles a month before they hit a paywall, the company has rescued itself from bankruptcy to win more than 2 million digital subscribers.



AUTOMATING THE GATE

Of course, it's critical to connect your gating process to your marketing automation platform to make sure you capture (and benefit from) the leads you've generated. To get the most out of your gated content, follow these **five steps for success:**

1) Set your opt-ins and forms



Think carefully about the **kinds of leads** you want, (target market, company size, job title, etc.) before you create your forms. You'll also want to consider your end goals:

- Shorter forms will bring in more leads, so if you're chasing brand awareness, that will be the right way to go
- Longer forms may bring in higher-value, more targeted leads; if your aim is to increase the number of sales qualified leads (or SQLs), this might be the better approach

Remember that you can **enable progressive profiling** to capture more data once your visitors have been identified as leads. In fact, progressive profiling is one of the key strategies that you can use to convert your leads into clients.

In progressive profiling forms, prospects will be asked to provide increasingly more detailed information, with the fields that they have already given you hidden from view. By asking for just a couple of fields of information at a time, your leads are much likelier to give you the data you need to properly build up their profile, qualify them, and target them accordingly.

So remember: the more you know about your leads, the easier it will be to craft the right message for them. And the more targeted the message, the higher the chances that lead will turn into a loyal client.

2) Segment your data and filter by interest



Adding fields on your forms can also give you the option to segment your leads and then send different follow-up emails to each customer type. For instance, if you collect information on industry type, you can then send an email with industry-specific information or suggestions to other content relevant to them.

You could also segment and filter your data by job title (and send relevant information accordingly) or by level of interest (you can ask more detailed information of a lead that has visited your page more times than you can if the lead is new).



3) Write enticing copy to promote your piece

Make sure your offer email and landing page content are as high-quality and attractive as the content you are offering to maximise the chances of your leads clicking to download your content (and give up their details).



Craft all your promotion copy carefully and decide what the communication chain will look like: will you offer your content to leads on a **landing page**, or will you **email them** the gated content offer. Ensure your copy entices leads to want your piece (and don't forget to include engaging images across your promotional campaign emails and landing pages!)

4) Feed into existing campaigns



If you include an opt-in for additional marketing materials on your gating form, your marketing automation platform can automatically add these leads to your other mailing lists, increasing your engagement with the leads. You can also link your gating content campaign into other campaigns to maximise your marketing reach.

As always, make sure you've clearly asked for consent before sending anything to your leads. Content marketing experts *Brafton* explain: "Getting consent does two things: appeals to your potential customers, as they won't be automatically sent marketing messages they might not want; [and] helps you collect data on user intent and gives you an idea of how well your content resonates."

5) Assess promotional campaign performance

As with all marketing processes, this final stage is critical. **Evaluate how your gated content is performing**. Are you seeing results? Do you notice an uptick in leads? Are the leads who have arrived via gated content easier to convert? Which pieces are doing well, and what makes those pieces different? Build this feedback into your gating process (and content creation planning!) as you move forward.



Gating content can be a highly effective way to build your leads, but getting the most out of gating can be tricky. If you'd like some suggestions on how gated content could be generating more leads for your business, we'd love to help.



About JTF Marketing

As one of Europe's leading marketing automation specialists, JTF Marketing is an award-winning marketing automation agency whose mission is to help businesses drive revenue growth through predictive marketing performance.

We've helped a wide range of customers optimise their marketing funnel and increase their ROI, including:

- Sommet Education (who worked with us to drive a 4x increase - from 15% to 60% - in digital marketing revenue contribution whilst driving down the cost per lead by 50%)
- Euler Hermes
- Fidelity International
- Plus dozens of others who don't like to be named! :)

We can deliver such results because we believe we can help our clients go way beyond email marketing by **guiding them throughout the entire marketing automation transformation:**

- We'll help you get ready for your marketing automation transformation with our Readiness Assessment Programme (understanding your requirements, developing your objectives, selecting a tool selection, and planning implementation).

- If you've already got a marketing automation platform, we'll help you utilise **all** of your platform features. We'll identify those opportunities with our proprietary marketing technology (MarTech) **audits**.

- We'll guide you through **best practice and optimisation of your marketing automation platform** so you can improve your campaign results, optimise your marketing funnel, and help you convert more leads - faster!

- We'll help maximise the return on investment (ROI) of your platform by setting up **reporting with actionable insights** to guide priorities, monitor performance, and enable you to improve continually.

- We'll **manage your marketing automation** processes and campaigns on a full-time basis or whenever you need a hand (whether that be on a day-to-day basis or for a special project) with managed services from our certified automation consultants.

We offer an integrated and personalised service: whether onsite, remote, or a hybrid of the two, we are committed to helping you meet your goals and build a scalable automated performance strategy that delivers results, no matter your digital marketing objectives.

Get in touch to talk about your lead management strategy

JTFMarketing.co/gating-content



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We'd love to hear from you!

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EMAIL US

www.jtfmarketing.co