

GET SH*T DONE.

WITH MARKETING AUTOMATION

SEGMENTATION IN 3 EASY STEPS

INTRODUCTION:

SEGMENTATION

According to Campaign Monitor, marketers have noted a **760% increase in revenue from segmented campaigns**. Those are the kinds of results we all want from our email marketing efforts, right?

In addition to insanely better open rates and increased revenue, segmenting your lists allows you to have smarter, more personal and relevant conversations with your customers and prospects – based on who they are and their engagement with your product or service. Segmenting your database allows you to use a variety of factors to determine who to send one-off emails (sales, events), routine emails (newsletters), or when a prospect should be added to an automated program.

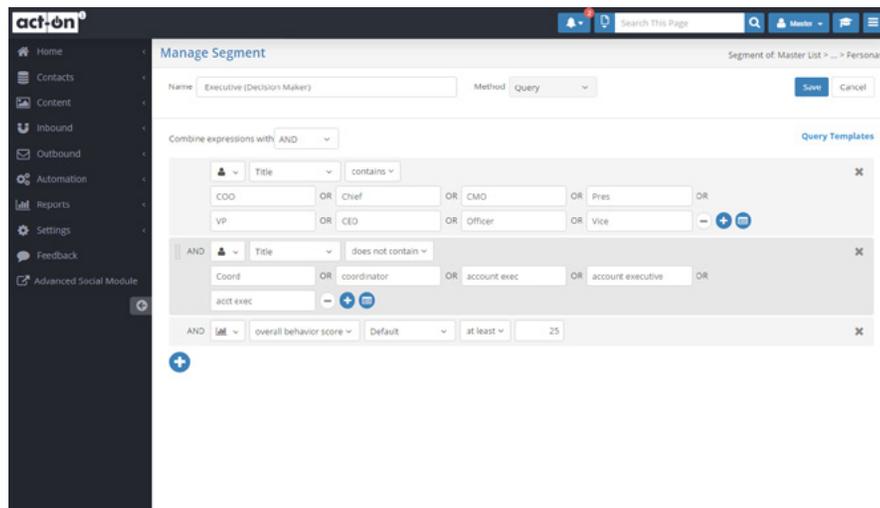
Yes, creating segments will be an investment of a little bit of time but it'll pay off big in the end. We promise.



STEP 1:

BUILD A MASTER LIST

Creating independent lists can be helpful, yet more often than not, you should always be **working from a Master List**. This will help keep your data clean and well organized. The use of data fields can also give you the ability to group specific types of leads together – we'll get into this in Step 3! By starting from a Master List, you'll be able to segment your database in order to deliver personalized, timely content to your audience without finding yourself lost in a web of lists.



STEP 2:

UNDERSTAND THE 6 CORE SEGMENTS

There are six core segments that will, without a doubt, help you deliver more personalized and relevant messaging to your target audience.

1. ENGAGEMENT OR FUNNEL STAGE



Using lead scoring rules, an organization can define the top, middle, bottom of their marketing funnel, as well as the Marketing Qualified Lead (MQL) criteria that triggers a handoff to sales.



2. CUSTOMER STATUS



You know who your customers are, so make sure that data gets into your marketing automation (MA) platform. Segmenting your customers from your prospects is core to not only preventing message confusion but also being more targeted with your content and engagements.

3. PERSONA OR ROLE



This is absolutely the most important type of segmentation you can have. Persona-based segmentation usually fits in three key categories:

- 1. Decision Maker:** Budget and contract authority
- 2. Influencer:** Recommends solutions and advocates your product/service
- 3. User:** Benefits from or uses the product/ services you offer

STEP 2:

UNDERSTAND THE 6 CORE SEGMENTS (CONTINUED)

4. INDUSTRY



Tailoring your message with industry terms and relevant content can be a huge competitive differentiator. It's highly recommended that organizations segment the industries they sell into and customize the messaging and content for them. Often this is as simple as changing simple nouns. For instance, (depending on the industry) prospect = donor = patient.



5. PRODUCT OR INTEREST



You can segment your list by the type of product your prospect has shown interest in. For example, if you sell bicycles and motorcycles, but your prospect has only ever downloaded content about bicycles, you can safely assume that they are interested in receiving content about bicycles, not motorcycles. This type of segmentation is based on **tracked behaviors**. These product/interest segments can be used to trigger specific email nurture programs, or to remove people from automated programs they are currently in but perhaps are receiving the wrong content.

6. GEOGRAPHY



Timing your messaging and your content distribution based on cultural norms and specific time zones is a great way to dramatically increase your campaign effectiveness. If you're an Act-On customer, you'll soon be able to use **Adaptive Sending** to predict the best time to send a message to an intended recipient. Let's say Clark Kent, Director of IT at ACME Co., always reads his emails before bed at 11pm. Adaptive Sending will detect this, remember this, and make sure Clark's emails are delivered to the top of his inbox during this "optimal engagement window."

STEP 3:

DETERMINE HOW TO SEGMENT YOUR DATABASE

Determining how to segment your own database can be tough! Some segments will be more obvious, such as the industry they're in or the persona they identify with. However, some will be trickier – such as creating segments in direct response to specific behavior, like visiting a pricing page on a website. This is where your MA platform will come in, tracking each of your prospects' behaviors in order to get a better idea of what they might be looking for. These segments can be used to trigger specific **email nurture programs**, or to exit people from programs they are in.

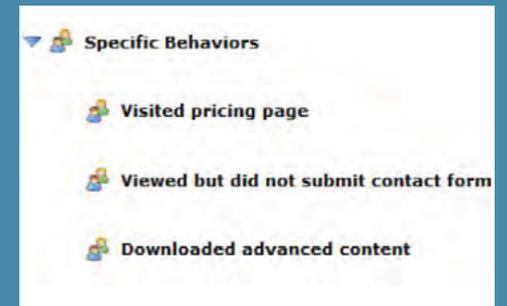
Follow these steps for thinking through how to use the six core segments of your database:

1.

Step One: Start with dynamic segmentation based on profile (intrinsic) and behavioral (extrinsic) attributes. For example, you'll want to segment out your customers vs. prospects. Or those who have engaged with you vs. those who haven't. This will start to give you a general distinction between different segments of your database.

2.

Step Two: Using sub-segments you can create more granular views of your prospect database. Start with segmenting your list first by industry, then by persona, and finally by engagement – or where they are in your funnel.



Taking these steps and defining your hierarchy in the planning stage will dramatically aid in automating processes as you move into advanced marketing automation.

CONCLUSION

Segmentation is your first step to automation. By capturing, understanding, and acting on the data that you receive from your customers, you'll be well on the way to delivering personalized and relevant content that they'll actually want to read. To learn more about segmentation, automated programs, or any of the other things we've discussed, visit the [Act-On University](#) for access to our in-depth Knowledge Base which includes valuable articles, tips, and tricks. To learn how Act-On can help you [automatically] create highly targeted campaigns, check out our [Adaptive Segmentation](#) tool!

*Stay tuned for the next installment of the #GSD series where we'll give you quick and easy ways to get sh*t done!*

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About Act-On Software

Act-On Software is a marketing automation company delivering innovation that empowers marketers to do the best work of their careers. Act-On is the only integrated workspace to address the needs of the customer experience, from brand awareness and demand generation, to retention and loyalty. With Act-On, marketers can drive better business outcomes and see higher customer lifetime value. The Act-On platform provides marketers with power they can actually use, without the need for a dedicated IT resource.

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