VIDEO 1: WHY USE LISTS?

Hi, welcome to an introduction to Lists. I'm Isaac from HubSpot Academy.

By the end of this class you will understand all of the different ways that Lists empower marketers to create contextual, relationship-driven marketing that creates results. You'll leave with a clearer vision of your segmentation strategy, a strong understanding of list logic, and knowledge of the metrics related to successful list performance. Ready to get started?

So why Use Lists in HubSpot? Before we get started, however, let's discuss, "What is a List"?

Lists are the different ways that you break up your contacts into smaller segments based on their similarities. Lists can be cut and combined in a number of different ways: Industry, Demographic Information, Company Size, Job Role, you name it. The world is your oyster – with one limitation.. The contact data you have to work with depends on what information your leads decide to share with you.

Remember, inbound marketing is all about this marriage of context and content. When you divide your contacts into smaller groups based on similarities, it lets you use context to make your content more relevant and engaging.

Context is the present and foreseeable future of inbound marketing. Your leads and customers are people, and people are a sum total of their experiences. Their relationship with your company expands across marketing channels, devices and communication touchpoints.

Lists, and the contact database that powers your list-building, is what gives context to the content people consume and the experience they have with your brand.

People don't even pay attention to the road when they are driving, anymore. It's a scary thought, but a true one.

To expect people to pay attention to your blogs, emails or social media posts just because you spent a lot of time crafting them is naive at best, and detrimental to your business at worst.

In fact 74% of online consumers get frustrated with websites when content appears that has nothing to do with their interests.

Simply put, lists empower marketers to do relationship driven marketing that drives results.

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A quick look at the impact of segmentation on email marketing metrics confirms the power of lists. Increased engagement and decreased complaints across the board. What business wouldn't want that?

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In the context of the Inbound Methodology, list segmentation is essential to how businesses should think about closing prospects and delighting customers.

Together, Contacts and Lists allow you to store, segment, and market to all of the people in your database. Lists are critical to the process of closing leads into customers, as they allow us to organize and communicate with your contacts based on their common needs and priorities.

Once you have transformed those leads into customers, you want to delight them into becoming promoters. This is the foundation of the network effect. Happy customers become evangelists, who then attract new strangers as they share your product with their own personal network. This is the best way to turn your customers into a positive lever for growth.

In a lot of ways, we've reached a technological milestone. The convergence of data, social listening, and integrated communication tools can now help companies align around the customer to provide outstanding support and customer service.

You have different types of customers though, and it doesn't make sense to communicate with all of them in the same way. You have old customers and new customers, repeat customers and single-time buyers.

Providing outstanding customer service and support requires a deep understanding of what makes your customers unique, and segmentation is a critical component of figuring that out.

Up next, we'll discuss the best practices for List building and maintenance - four simple tips that will help you build a successful segmentation strategy

VIDEO 2: HOW TO USE LISTS

In the last video we discussed how segmentation informs how you communicate with your contacts. But how do you build a great segmentation strategy that takes full advantage of HubSpot's powerful contact database?

Let's look at those four best practices for building great lists. These four best practices will help you harness the full value of your contact database. First up, you'll need to define your segmentation strategy.

It can't be overstated. Your ability to segment will be a key indicator of your inbound success. Like I mentioned before, list segmentation allows you to slide and dice your contact database into similar groups and create more contextualized, relevant marketing.

Your segmentation strategy will be contingent on two things: How you plan to use your lists, and what data you use to segment your contacts. Over the next few minutes, we'll examine how both plan an important role in your marketing and sales strategy.

I like to say that lists are the oil for your inbound engine. They make sure everything is operating effectively and efficiently. And when you look at all of the activities that require lists, it's no wonder segmentation is held in such high regard. Once you build a list you can send that segment an email, enroll them in a lead nurturing workflow, provide them with a contextualized marketing experience, monitor them on social media and report on and analyze their activity.

Let's look at a breakdown of how marketers typically segment their contacts. Two themes jump out: Who somebody is, and where they are on the path to purchase are the most trusted ways to personalize your communication with a contact.

At HubSpot, we know these two core segmentation strategies as Buyer Personas and the Buyer's Journey. Let's look at Buyer Personas first.

Buyer Personas are so, so important to your inbound strategy, so it's no surprise that they've popped up again.

Buyer personas are fictional, generalized representations of your ideal customers. Personas help us all -- in marketing, sales, product, and services -- internalize the ideal customer you're trying to attract, and relate to your customers as real humans. Having a deep understanding of your buyer persona(s) is critical to driving content creation, product development, sales follow up, and really anything that relates to customer acquisition and retention. So it's not too much of a leap to say that it should drive your segmentation strategy as well.

The second thing to consider when communicating with your leads and customer is: Where is your audience in the Buyers Journey? Sending a great message to the right buyer persona at the WRONG time can be a HUGE problem.

The Buyers Journey helps you align your messaging across all channels with where a contact is on their path to purchase. And if they are already a paying customer, you want to adapt your communication to that fact as well.

Buyer Personas and the Buyer's Journey are two guideposts you should use when segmenting your contact database. Embracing both of them will be important to your success.

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Ultimately, your segmentation strategy will only be as good as the data you collect.

Which leads us to the next best practice, segmenting people based off of both implicit and explicit data. It's probably best to start with some definitions.

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Explicit data is information that is intentionally shared between a contact and a company. For example, think of the information that a contact fills out on a landing page or Contact Us form. Even if that information is gathered from somewhere like LinkedIn or Twitter, its data a person has willingly shared with the community at large.

Here's where things get interesting. What prospects tell us about themselves is only the surface of what you can discover.

Implicit data is information gathered from user behavior.

Comparing and contrasting the two, you can see what each type of data looks like in HubSpot. Examples of explicit data are Contact Information, Company information, form submission and survey responses. Implicit data includes social media engagement, email engagement, web analytic history and conversion data.

All of this data is no good unless you know how to manipulate it, so it's time to undertake the practical goal of mastering list logic.

First up is the distinction between smart and static lists.

Smart lists update automatically to include new contacts who meet the list criteria. This means they are permanently bound by the criteria, or logic, that you used to create the list. Not only will a smart list include new relevant contacts, it will also remove contacts who no longer meet the criteria.

Some great examples of smart lists to build would be lists based on lifecycle stage, suppression or "block" lists, and lists that track engagement with a specific offer.

Static lists take a snapshot of the contacts who meet the criteria when the list is created, but do not continue to update on their own. They don't update automatically, which means you are free to add or remove contacts at will. Static lists are great for one-off email sends, infrequent email campaigns or lists that don't need to be updated often.

Next we need to discuss and/or criteria logic. Take a deep breath and let's work through this together. What you are looking at right now is an example of OR logic. OR logic says that each set of requirements should be treated separately from one another. In other words, set of requirements is looked at exclusively, and a contact needs to only satisfy one of the set of requirements to join your list.

In the example on screen, each of the Form Submission criteria above are separated into their own visual boxes. To enter this list, a contact needs to only submit Example Form 1 OR Example Form 2 OR Example Form 3 in order to qualify for list membership.

On screen now is an example of AND logic. You will see there are now two requirements in one set. This means a contact will need to satisfy every single requirement of the set in order to be added as a member of your list.

The difference between AND and OR logic is one of scope. OR logic allows you to cast an increasingly wide net as you filter your contacts, while AND logic facilitates drilling down in a much more specific and granular way.

So far we have been talking primarily about contact properties. That is only scratching the surface of what lists can do. There are a number of different filtering operators that you can use to capture the full value of list segmentation.

For every customer, the Lists tool allows you to segment by
- contact properties
- deal properties
- company properties
- if a contact is on a particular list
- if a contact has filled out a particular form

For Professional and Enterprise customers, you can also segment by:
- If a contact has visit a specific url or part of a url
- If a contact is currently in a workflow
- If a contact has or has not interacted with a specific email

Enterprise customers will also be able to filter by custom events.

And last but certainly not least, if you've integrated third-party tools like survey results or webinars you'll be able to filter your lists using that criteria as well.

The last best practice is to analyze your list's performance.

The logic of your list allows you to group contacts based on similar qualities and behavior. But what if you want to dig deeper?

Some important things to evaluate are:
List growth and decay: How is your list changing over time? Is this segment of your contact database increasing or decreasing?

List engagement across various channels: It's important to remember that your leads and customers do not exist in a vacuum. They interact with your brand in many different ways across multiple channels. Insight into the engagement rate, and particular patterns of a segment is extremely valuable.

Lifecycle stage breakdown: Where are the contacts in this list on their path to purchase. For many segments, this will be an essential insight into your funnel.

Original Source Type: Where are these contacts coming from? This metric is critical to identifying growth channels and refining where your marketing decides to focus their time.

If you are a professional or enterprise customer, this data about each list is consolidated in the List Performance section accompanying every list. For basic customers, fear not. All of this information is still available in your portals. All you'll have to do is refine your lists specifically using the logic. For example, if you wanted to see how many contacts in a specific list were customers, you would add a logic requirement that filtered out all of the other lifecycle stages. As your reporting needs grow, the consolidated feature of List Performance might make sense.

Here they are again. The four best practices that will help you create a first-class segmentation strategy that harnesses the full power of your contact database. Define your strategy, use both implicit and explicit data, master the logic of list-building, and be sure to analyze the performance of your lists. Do all of these and you'll be well on the way to Inbound Success. Good luck and happy HubSpotting.

VIDEO 3: TOOL WALKTHROUGH

View the user guide or additional resources on the class page for a text version and instructions on how to use the tool.