

Segment Name

Segment Conditions

Which characteristics / behaviors are typical of this segment?

Goal Drivers

What would trigger a lead to move to the next segment?

Tip: This is typically the same as the "segment conditions" for the next segment to the right.

Email Steps

What kind of targeted content do you want to email to this segment?

Tip: Your emails should be a mix of useful content and calls to action that push leads toward completing the goal.

Website Content

What targeted calls to action should this segment see on our website?

Tip: Your website CTAs should be focused around moving leads toward completing the goal.

Monitoring

What website actions or social media terms do you want to monitor for this segment?

The diagram illustrates a three-stage process flow, represented by three vertical panels connected by arrows pointing from left to right.

- Panel 1 (Left):** Contains a list of items. The top item has a checkmark icon. The second item has a checkmark icon. The third item has a checkmark icon. The fourth item has a checkmark icon. The fifth item has a checkmark icon. The sixth item has a checkmark icon. The seventh item has a checkmark icon. The eighth item has a checkmark icon. The ninth item has a checkmark icon. The tenth item has a checkmark icon.
- Panel 2 (Middle):** Contains a list of items. The top item has a checkmark icon. The second item has a checkmark icon. The third item has a checkmark icon. The fourth item has a checkmark icon. The fifth item has a checkmark icon. The sixth item has a checkmark icon. The seventh item has a checkmark icon. The eighth item has a checkmark icon. The ninth item has a checkmark icon. The tenth item has a checkmark icon.
- Panel 3 (Right):** Contains a list of items. The top item has a checkmark icon. The second item has a checkmark icon. The third item has a checkmark icon. The fourth item has a checkmark icon. The fifth item has a checkmark icon. The sixth item has a checkmark icon. The seventh item has a checkmark icon. The eighth item has a checkmark icon. The ninth item has a checkmark icon. The tenth item has a checkmark icon.

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