



CLASS 03

# Contact Management and Segmentation

---

Professor: Isaac Moche

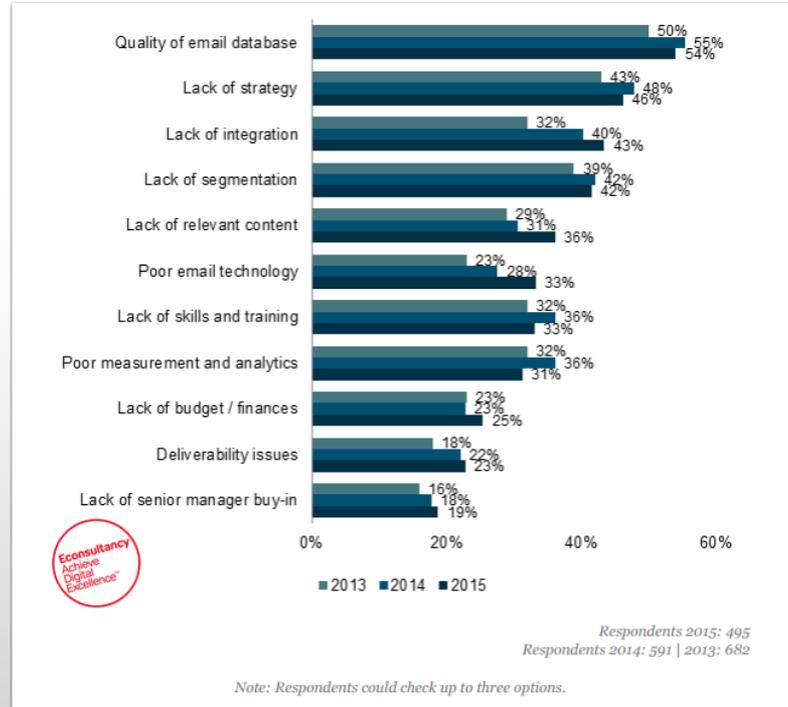
**Email Certification**

Brought to you by HubSpot Academy

1

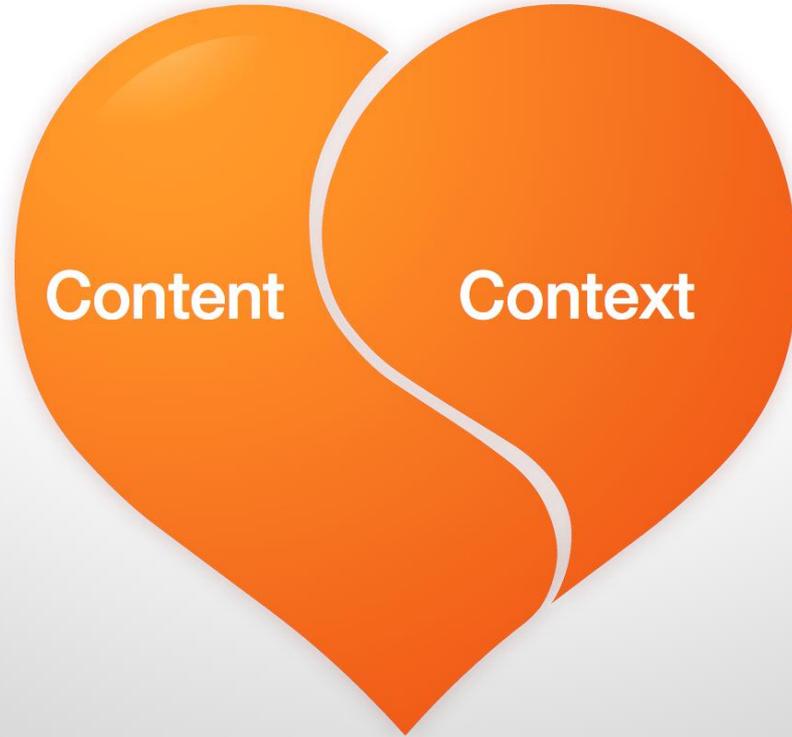
# WHY CONTACTS AND LISTS ARE IMPORTANT

# BARRIERS TO EFFECTIVE EMAIL MARKETING



**LIST SEGMENTATION IS  
ESSENTIAL TO CLOSING  
PROSPECTS AND  
DELIGHTING CUSTOMERS.**

# INBOUND MARKETING STRATEGY



**SEGMENTATION EMPOWERS  
MARKETERS TO DO  
RELATIONSHIP-DRIVEN  
MARKETING THAT  
DRIVES RESULTS.**

# Segmented vs. Unsegmented Email Campaigns

METRIC	RESULT
<b>Opens:</b>	13.64% higher than non-segmented campaigns
<b>Unique Opens:</b>	10.00% higher than non-segmented campaigns
<b>Clicks:</b>	53.05% higher than non-segmented campaigns
<b>Bounces:</b>	2.27% lower than non-segmented campaigns
<b>Abuse Reports:</b>	8.67% lower than non-segmented campaigns
<b>Unsubs:</b>	8.13% lower than non-segmented campaigns

# WHAT IS A LIST?

Lists are the different ways that you break up your contacts into smaller segments based on their similarities.

# WHAT IS A CONTACT DATABASE?

Your contact database is a place to keep track of all the people and companies that have a relationship with your business.

# QUALITIES OF A GOOD CONTACT DATABASE

- See the whole picture of every contact
- Aligns Marketing and Sales
- Seamless integration with every tool you use

A network of glowing blue neurons with red nuclei, set against a dark background with floating particles. The neurons are interconnected, forming a complex web. The text is overlaid on the left side of the image.

Your contact database is  
the nerve center for  
all of your Inbound efforts.

# THE CONTACT RECORD CONSOLIDATES TOUCHPOINTS



The background of the slide is a dark blue-grey color with a repeating pattern of small, light grey lightbulb icons. The icons are arranged in a grid-like fashion, with some appearing slightly more prominent than others.

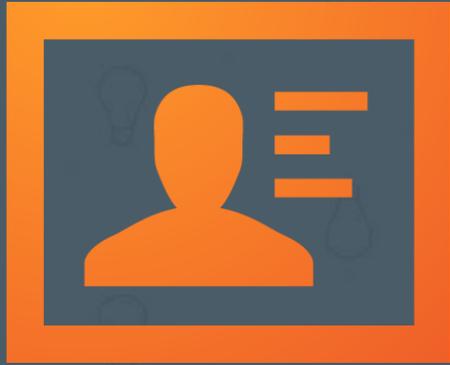
# 2 HOW TO BUILD A SEGMENTATION STRATEGY

# BEST PRACTICES FOR SEGMENTING YOUR CONTACTS

- Make sure your database is accurate and up-to-date
- Determine your segmentation strategy
- Segment your contacts using implicit and explicit data

# BEST PRACTICES FOR SEGMENTING YOUR CONTACTS

- Make sure your database is accurate and up-to-date
- Determine your segmentation strategy
- Segment your contacts using implicit and explicit data



**A CONTACT IS  
ANYBODY YOUR  
COMPANY  
COMMUNICATES WITH  
IN THE COURSE OF  
DOING BUSINESS.**



A **CONTACT PROPERTY**  
STORES INFORMATION  
ABOUT AN INDIVIDUAL  
CONTACT.



A **COMPANY PROPERTY**  
STORES INFORMATION  
ABOUT A GROUP OF  
CONTACTS.



## STORE INFORMATION

- Website activity
- Email engagement
- Social Media activity
- Form submissions
- Conversion information
- Integrations



## SURFACE INFORMATION

- Personalize email
- Build Lists
- Trigger marketing automation
- Define Personas
- Lead Intelligence

# KEEP YOUR CONTACT DATABASE UP-TO-DATE

- Upload all current business contacts
- Track contacts as they move through the buyers journey
- Set up and maintain integrations with other software
- Keep your data clean

No two businesses are alike.

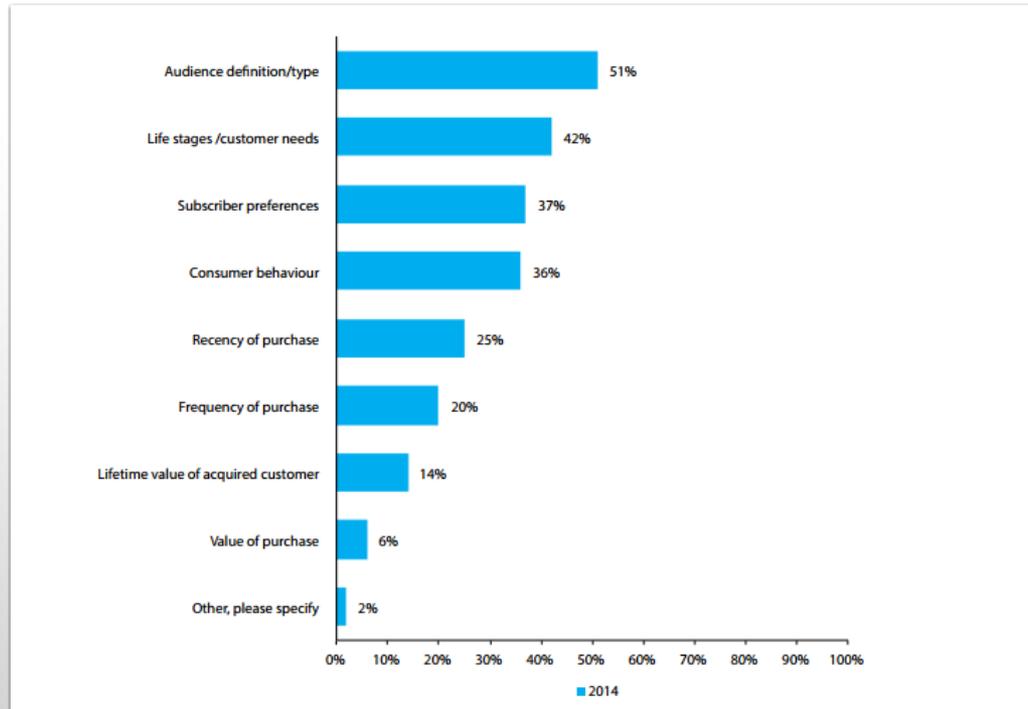
Build custom contact properties to make HubSpot your own.

# BEST PRACTICES FOR SEGMENTING YOUR CONTACTS

- Make sure your database is accurate and up-to-date
- Determine your segmentation strategy
- Segment your contacts using implicit and explicit data

**YOUR ABILITY TO SEGMENT  
WILL BE A KEY INDICATOR  
OF YOUR SUCCESS AS AN  
EMAIL MARKETER.**

# HOW MARKETERS SEGMENT THEIR CONTACTS



PRIMARILY, YOU SEGMENT BY  
YOUR **BUYER PERSONAS.**

# BUYER PERSONAS

Semi-fictional representations of your ideal customer based on real data and some select educated speculation about customer demographics, behavior patterns, motivations, and goals.



# COMPANY-RELATED SEGMENTATION



Company Size



Company Type



Industry

# ROLE-RELATED SEGMENTATION



Department



Seniority



Function

# BEHAVIOR-RELATED SEGMENTATION



Conversion Events



Email Opens



Page Views

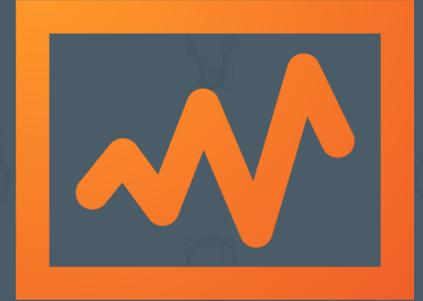
# MARKETING INTELLIGENCE RELATED SEGMENTATION



Social Media Data

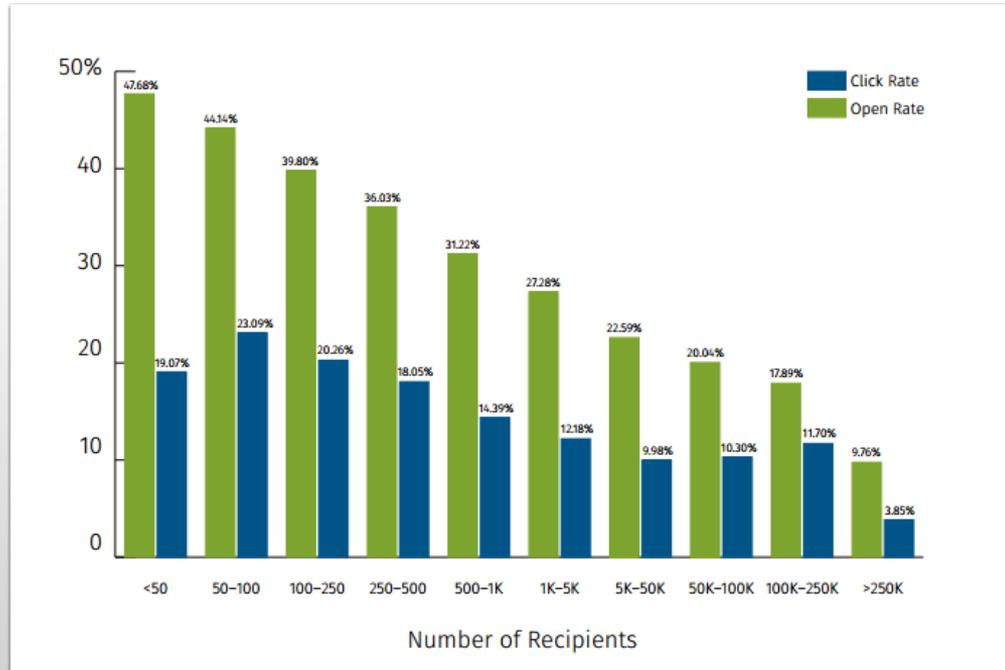


Original Source



Web Analytics

# ENGAGEMENT RATES DECREASE AS MAILING SIZE INCREASES



# BEST PRACTICES FOR SEGMENTING YOUR CONTACTS

- Make sure your database is accurate and up-to-date
- Determine your segmentation strategy
- Segment your contacts using implicit and explicit data



**EXPLICIT DATA IS  
INFORMATION THAT  
IS INTENTIONALLY  
SHARED BETWEEN  
A CONTACT AND  
A COMPANY.**



What prospects tell you about themselves is only **the surface** of what you can discover.



**IMPLICIT DATA IS  
INFORMATION  
GATHERED FROM  
USER BEHAVIOR.**

# EXPLICIT AND IMPLICIT DATA IN HUBSPOT



## Explicit Data

- Contact information
- Company Information
- Form Submission
- Surveys



## Implicit Data

- Social media engagement
- Email engagement
- Web analytic history
- Conversion data

The background is a dark blue-grey color with a repeating pattern of lightbulb icons in a lighter shade of blue-grey. The icons are arranged in a grid-like pattern across the entire page.

# 3 WHAT DOES A GOOD SEGMENTATION STRATEGY LOOK LIKE?

A wooden branch is shown with several stages of caterpillar development. From left to right, there are three green caterpillars of varying sizes, followed by a brown pupa, a brown pupa on a brown leaf, a brown pupa, a brown pupa, and a brown pupa. A large, colorful butterfly with black, white, and orange patterns is perched on the branch on the right side.

Build **separate lists** for your subscribers, leads and customer. These lists ensure that you send the right person the right message at the right time.



**Personas** give you a clear picture of who will be receiving your email.

**BUILD LISTS THAT TRACK  
ENGAGEMENT WITH  
KEY OFFERS.**

The background is a dark blue-grey color with a repeating pattern of lightbulb icons in a lighter shade of the same color. The icons are arranged in a grid-like pattern, with some appearing slightly larger or more prominent than others.

**THINK ABOUT  
BUSINESS-SPECIFIC  
INFO YOUR COMPANY  
MIGHT NEED TO TRACK.**

# CREATE LISTS BASED ON ENGAGEMENT

- Everyone who has visited your blog in the last 90 days
- All leads who have visited your pricing page
- All leads who have opened an email in the last 30 days
- All leads who found out about you through a specific source

# CREATE LISTS THAT MEASURE EMAIL HEALTH

- Contacts who have unsubscribed
- Contacts who have bounced
- All ineligible contacts
- Contacts who have not opened an email in the last year