



“This is a presentation about what it takes to create and sell something remarkable. It is a plea for originality, passion, guts and daring.”

--- Seth Godin

Segment



Presentation Topics

Contacts Database

- ❖ Create Segments
- ❖ Export to Excel
- ❖ Add Properties
- ❖ Smart Images

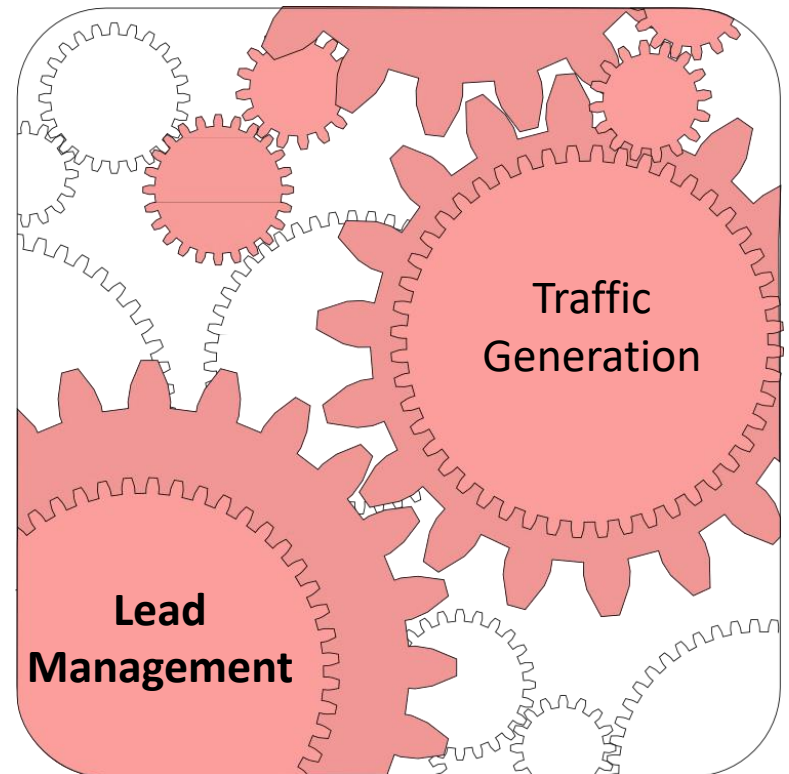
Lists Creation & Scoring

- ❖ Smart List
- ❖ Lead Scoring

Segmentation Key Tasks



- Contacts Database
- List Segmentation
- Lead Scoring



Lead Management



Understand

Segment

- ✓ Database
- ✓ Lists
- ✓ Scoring

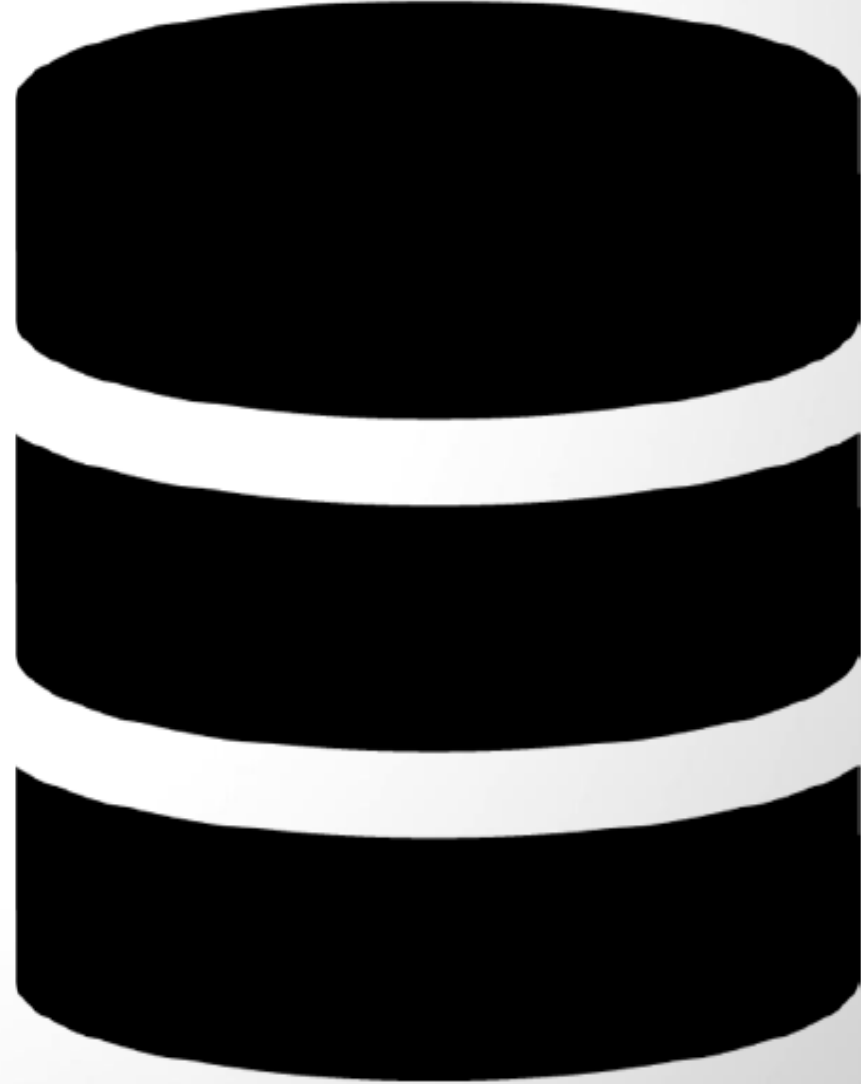
Nurture



What cards are you **holding** now?

your
contacts
database
is your most
important
asset

BUT YOUR DATABASE IS ONLY
AS POWERFUL AS YOU MAKE IT



BUT YOUR DATABASE IS ONLY
AS POWERFUL AS YOU MAKE IT



SEGMENT YOUR DATABASE



Break your database down into relevant segments by lead profile and lifecycle stage



GEOGRAPHIC SEGMENTATION

- IP Area
- Time Zone
- Area Code
- Address





By Dogancan Ozturan
<http://dogancan.org/>

FIRMOGRAPHIC SEGMENTATION

- Company size
- Company type
- Industry

 Segment by Page Views or Lead Source

 Segment by Topic of Offers Downloaded

 Segment by Lifecycle Stage

 Segment by Contact Properties



By Sarah Holmes
<http://sarahavk.tumblr.com/>

ROLE SEGMENTATION

- Department
- Seniority
- Function



By Rayi Christian W
<http://mumolabs.com/>

BEHAVIORAL SEGMENTATION

- Conversion events
- Email opens
- Page views

John Heinrichs

+ Add/Remove from Lists ✉ Opt Out of Email ▾ More Actions



← Return to All Contacts

Contact Details

Overview

Properties

- Contact Information
- Company Information
- Social Media Information
- Email Information
- Web Analytics History
- Conversion Information
- Classes
- Student Associations

- List Memberships
- Workflows
- Property History

All Properties 🔍 Search...

Contact Information

Owner Assigned Date:	<input type="text"/>	=	★	i
First Name:	<input type="text" value="John"/>	=	★	i
Interested?:	<input type="text"/>	=	★	i
Comments?:	<input type="text" value="Hi!"/>	=	★	i
Our BizBlog! Email Subscription:	<input type="text" value="Daily"/>	=	★	i
Last Name:	<input type="text" value="Heinrichs"/>	=	★	i
Salutation:	<input type="text"/>	=	★	i
Persona:	<input type="text"/>	=	★	i
Email:	<input type="text" value="ai2824@gmail.com"/>	=	★	i
Phone Number:	<input type="text"/>	=	★	i
Fax Number:	<input type="text"/>	=	★	i

Persona

Contacts Settings Customize HubSpot Contacts to fit your business

- Main Options
- Contact Properties**
- Contact Information
- Company Information
- Social Media Information
- Email Information
- Web Analytics History
- Conversion Information
- Classes
- Owner Information
- Student Associations
- Display Options
- Custom Lead Scoring
- Lifecycle Stages
- Form Field Mapping

Contact Properties

[About](#) [Personalization](#) [Forms](#) [List Imports](#)

To get the most out of your contact database, use HubSpot's custom contact **properties** to collect and leverage the information that matters to your business the most. We've prepared some ideas for you to get you started.

[Create Property](#) [Create Property Group](#)

Contact Information ✕

Label	Name	Used in	
Owner Assigned Date	hubspot_owner_assigneddate	No lists or forms	NOT EDITABLE
First Name	firstname	40 forms	NOT EDITABLE



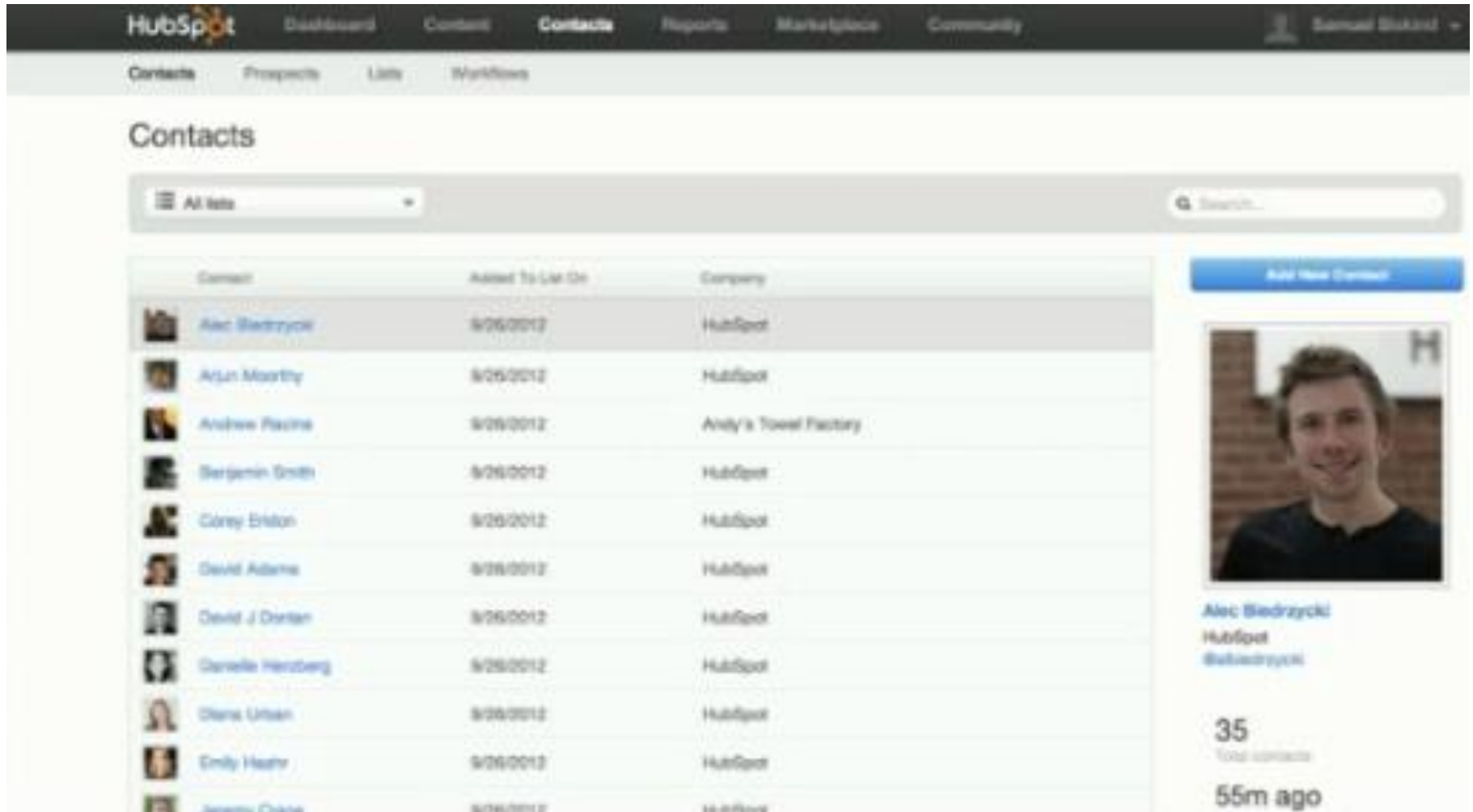
Ready?

Demonstration












By José Martín Ramírez Carrasco

Contact Database Tutorial

❖ Central Database for all contacts – 90 second tutorial



The screenshot displays the HubSpot interface. At the top, the navigation bar includes 'HubSpot', 'Dashboard', 'Content', 'Contacts', 'Reports', 'Marketing', and 'Community'. Below this, a secondary navigation bar shows 'Contacts', 'Prospects', 'Lists', and 'Workflows'. The main content area is titled 'Contacts' and features a dropdown menu set to 'All lists' and a search bar. A table lists contacts with columns for 'Contact', 'Added To List On', and 'Company'. The table contains 12 rows of contact information. On the right side, there is a blue button labeled 'Add New Contact' and a profile card for 'Alec Biedrzycki' from 'HubSpot', which includes a profile picture, name, company, and statistics showing '35 Total contacts' and '55m ago'.

Contact	Added To List On	Company
 Alec Biedrzycki	8/26/2012	HubSpot
 Arun Maathiy	8/26/2012	HubSpot
 Andrew Pasche	8/26/2012	Andy's Towel Factory
 Benjamin Smith	8/26/2012	HubSpot
 Corey Erlson	8/26/2012	HubSpot
 David Adams	8/26/2012	HubSpot
 David J Dorian	8/26/2012	HubSpot
 Danielle Herzberg	8/26/2012	HubSpot
 Derek Urban	8/26/2012	HubSpot
 Emily Heath	8/26/2012	HubSpot
 Jeremy Oline	8/26/2012	HubSpot



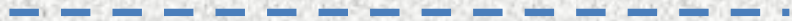
By Caleb George Morris

Ready?

Exercises

Page 13-14 of the workbook

- Develop Segment
- Export List to Excel
- Contact Settings
- Smart Images



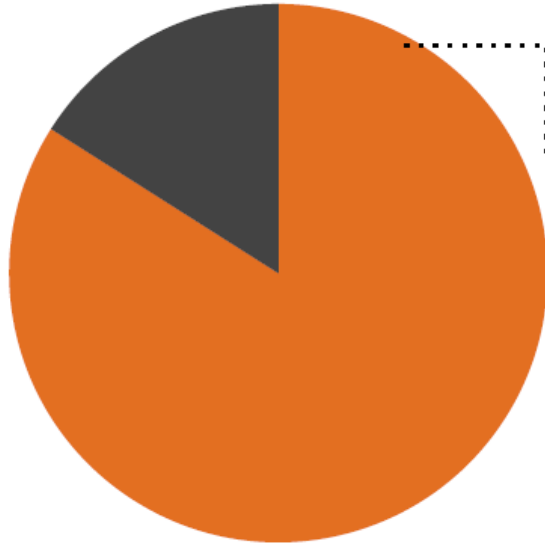
1. Create a segment based upon the traits/lifecycle stages.
2. Considering the defined segments, is the required information being captured?
3. “*Create Properties*” to add any required information to the Contacts database
4. Target that persona / segment by customizing the images displayed.

workbook exercise #2.1

?? minutes

Create a useful segment of your contacts and analyze them in Excel

Smart Lists / Lead Scoring



84% of **B2B marketers** use segment targeting in their email campaigns.

Lists Organize and segment your contacts [Tutorial](#)

Name your list

Should HubSpot update this list over time?

- Yes, make a *smart list* No, make a *static list*

Describe the contacts who should be in this list

Form

Visit

List

Event

Property



Smart Lists / Lead Scoring

Custom Lead Scoring

Create scoring rules below. Each rule assigns points to each contact who meets all of the requirements (“filters”) for that rule. When you save your rules, each contacts’ **HubSpot Score** is recalculated. You can [create a Smart List](#) for contacts whose HubSpot Score is above a certain threshold, allowing you to target people based on how engaged they are with your company.

NOTICE Clicking “Save changes” below will permanently erase your [old lead scoring settings](#).



Choose at least one filter to make this a valid rule.

Save changes



By Caleb George Morris

Ready?

Demonstration

Smart Lists / Lead Scoring Demonstration

Lead Scoring [Tutorial](#)

[Return to Settings](#)

The rules below determine a contact's **HubSpot Score**. You can [create a Smart List](#) to see all contacts whose score is above a certain threshold.

Assign points to contacts who meet all of these requirements:

List Membership

Contact

is a member of

ISM 7505

Rule Value:

Add

10

points

add another requirement

Assign points to contacts who meet all of these requirements:

Form Submission

Contact has filled out

ISM IA Information

on any page

No filter [Refine](#)

Rule Value:

Add

5

points

add another requirement

[+ Add another rule](#) to assign points to contacts who meet a different set of requirements



By Caleb George Morris

Ready?

Exercises

Page 15-16 of the workbook

- Create a “Smart List”
- Develop a “Score” for the Leads

1. Identify three ways to create the list
2. Identify the method used to allocate a lead score

workbook exercise #2.2

?? minutes

Create a useful segment of your contacts, score them, and analyze them Excel



Thank You!

innovation