

Segmentation and Contact Management

Weekly Workshops



Agenda

1. Intro to Contacts
2. Benefits of a Clean Database
3. Buyer Personas
4. Segmentation
5. Questions





Icebreaker

What are you most interested in learning about?



What is contact
management?



What is contact management?

The process of leveraging a dedicated software program that easily stores and sources customer contact information, including names, contact histories, and email information.



To grow your business, you need an effective content management strategy.



Contacts



Database
Management



Lead Nurturing



Conversion



What are contacts?

Defined as any prospects or customers your company markets to, sells to, partners with, engages with, or employs.



What is database management?

The process of keeping your contact data as clean and up-to-date as possible.



Your contact
database *naturally*
decays every year by
~22%.



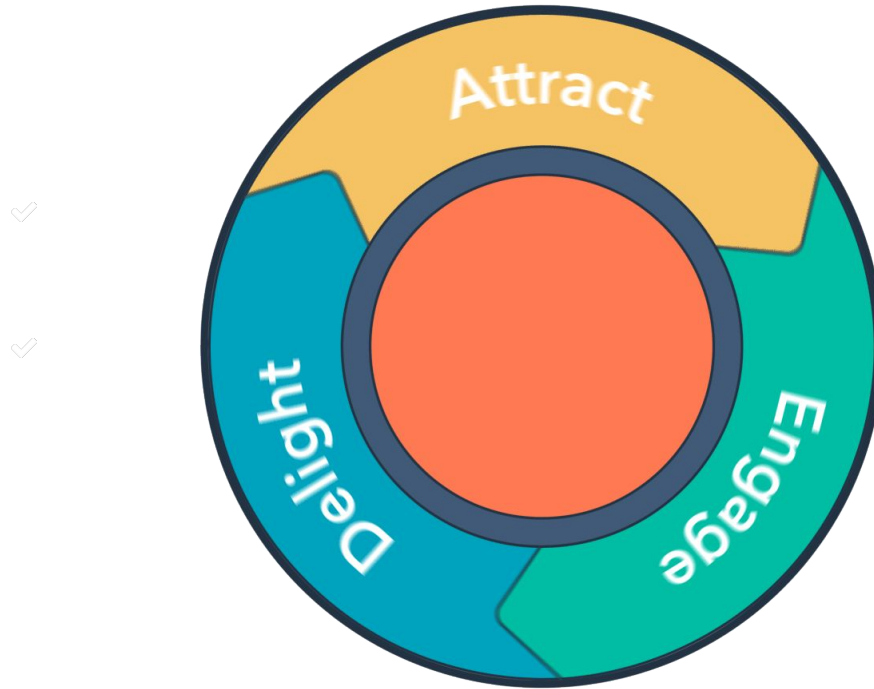


Discussion: Database Management

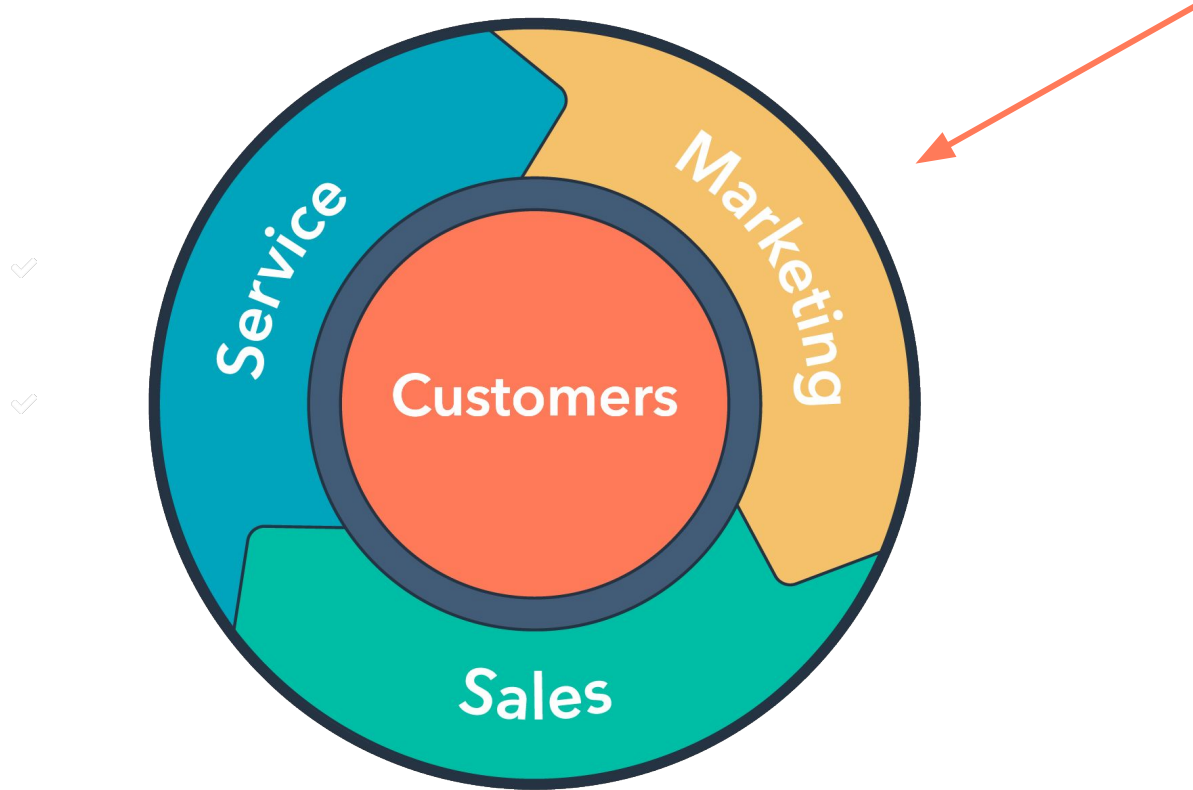
Why is this important? Share in the chat what your current strategy is based on or what it could be on?



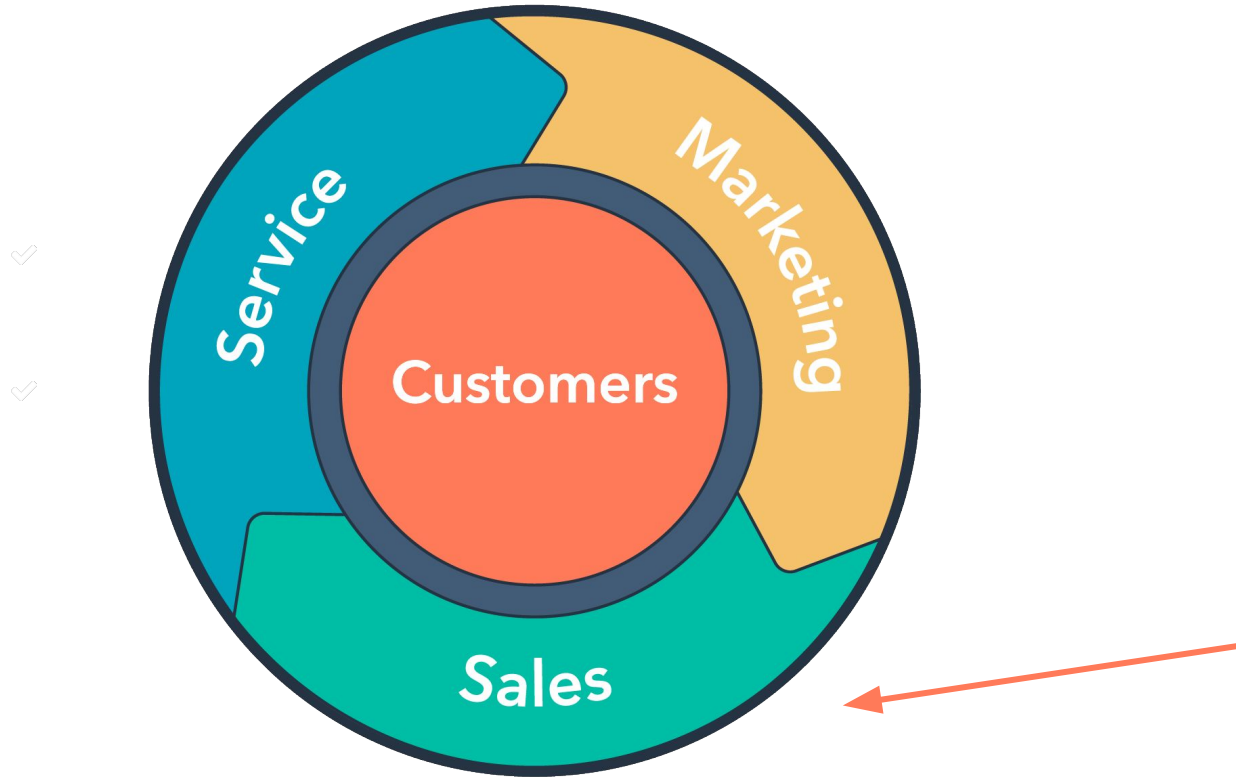
The Flywheel Model



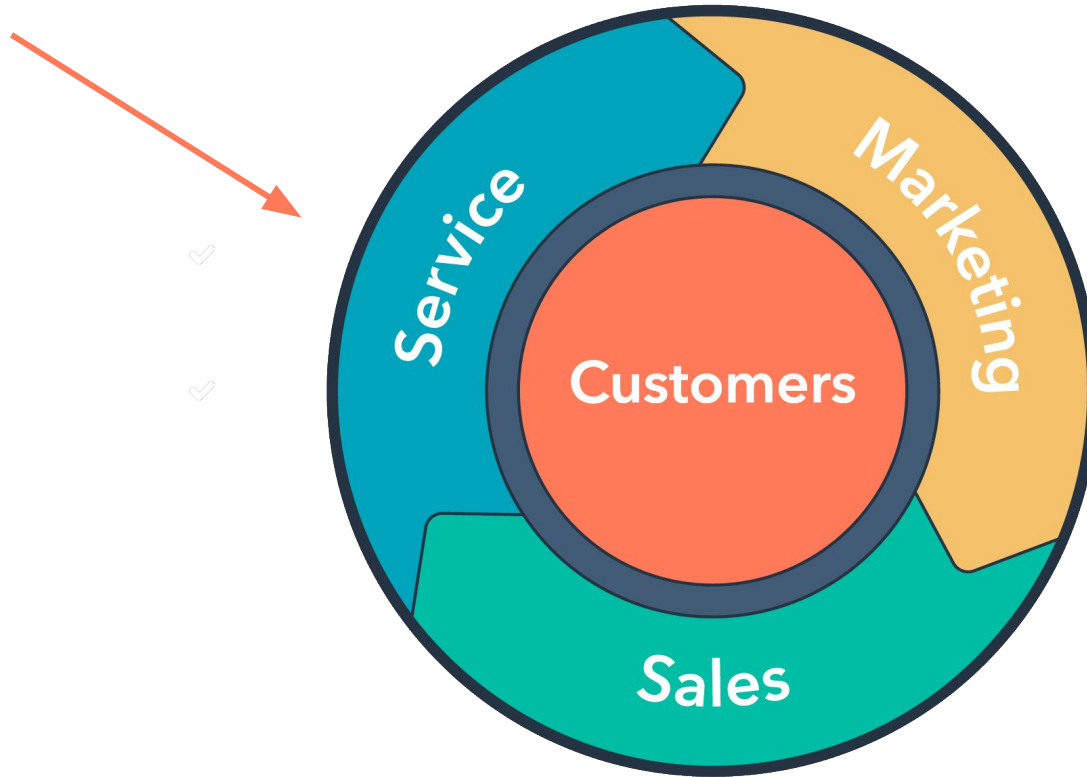
The Flywheel Model



The Flywheel Model



The Flywheel Model



What is lead nurturing?

The process of learning about your customers and prospects to better adapt to their needs and interests through your sales and marketing efforts.



What is conversion?

The point at which a contact performs a desired action.



What is segmentation?

The process of dividing your audience into smaller groups based on certain characteristics.





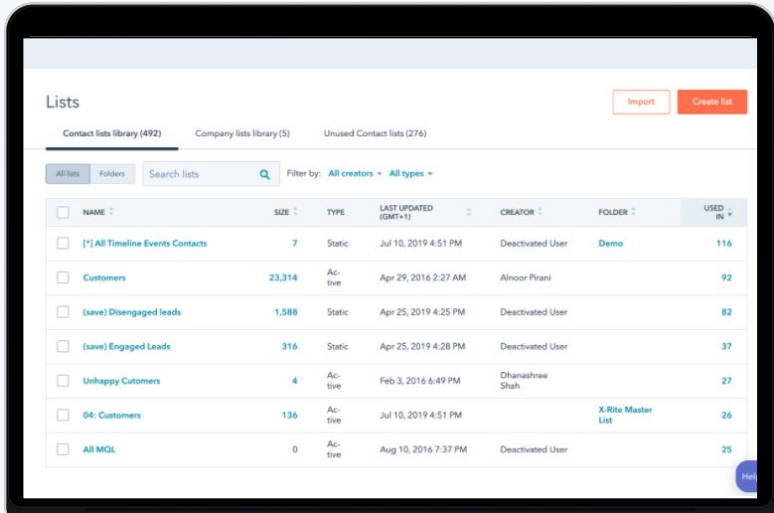
Discussion

What criteria can you use to segment your audience?



Segmentation

- Demographics
- Psychographics
- Lifestyle Traits
- Behavior



The screenshot displays a 'Lists' management interface. At the top, there are filters for 'Contact lists library (492)', 'Company lists library (5)', and 'Unused Contact lists (276)'. Below these are tabs for 'All lists', 'Folders', and 'Search lists'. A search bar and a filter dropdown (set to 'All creators' and 'All types') are also visible. The main content is a table with the following data:

<input type="checkbox"/>	NAME	SIZE	TYPE	LAST UPDATED (GMT+1)	CREATOR	FOLDER	USED IN
<input type="checkbox"/>	[*] All Timeline Events Contacts	7	Static	Jul 10, 2019 4:51 PM	Deactivated User	Demo	116
<input type="checkbox"/>	Customers	23,314	Active	Apr 29, 2016 2:27 AM	Alnoor Pirani		92
<input type="checkbox"/>	(save) Disengaged leads	1,588	Static	Apr 25, 2019 4:25 PM	Deactivated User		82
<input type="checkbox"/>	(save) Engaged Leads	316	Static	Apr 25, 2019 4:28 PM	Deactivated User		37
<input type="checkbox"/>	Unhappy Customers	4	Active	Feb 3, 2016 6:49 PM	Dhanshalwe Shah		27
<input type="checkbox"/>	04: Customers	136	Active	Jul 10, 2019 4:51 PM		X-Rite Master List	26
<input type="checkbox"/>	All MQL	0	Active	Aug 10, 2016 7:37 PM	Deactivated User		25

Why is segmentation important?

- Learn about your customers on a deeper level so you can tailor your content and communication to their unique needs and challenges
- Create targeted campaigns and ads that resonate with and convert segments of customers
- Understand who your most valuable customers are and why
- Identify new opportunities for products, support, and service efficiently



Tools to Segment your Contacts

- Filters: Isolate objects based on property values and condense them into a view that you need to access on a regular basis in the CRM.
- Lists: Create a list of contacts or companies based on property values and other characteristics
- Workflows: Used to automate your marketing, sales, and service processes to make your team more efficient





Activity

Create three workflows:

1. Route leads
2. Create deals
3. Create automated emails



Thank you

