

# **BUILDING STRONGER SEGMENTATION**

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**A Step by Step Guide to a Healthier  
Segmentation Strategy**

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Have you ever woken up and told yourself, “Today is the day? I’m going to start eating healthy, go to the gym, and look good at the beach this year!” You dive in head first.



Fast forward two months and you aren’t using a \$40 gym pass, and...well, if you have one slice of pizza you might as well have three. Defeat is accepted and you tell yourself, “Next year.”

The point being, if you jump into something without a plan or strategy, you are bound to fail. On the other hand, waking up in the morning and saying, “I want to get in shape, it’s time to come up with a plan,” will increase your likelihood of success.

The same thing goes for a segmentation strategy. Having a plan in place before jumping in and executing will significantly increase the chance of success. Take a methodical approach and break it into stages. Get one thing under control before moving onto the next.

Here is the health plan for your segmentation strategy.

## Define Health Goals - Define Business Goals

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Before beginning any health plan, there needs to be something to work for. Why? Because regardless of what the end game is, having a goal to achieve is motivation to reach new milestones. Whether it is to lose a few inches off the waist or to add a couple of inches to the biceps, regularly checking progress will highlight all the great strides being made, and keep the strategy headed in the right direction. It is much harder to slack off when there is something to work toward.



As a marketer, there are a number of KPI’s and goals that are set for any given marketing program. From email click rates, to tracking conversions from each stage in the pipeline, every part of the strategy should be measured. That is no different for segmentation.

What can be gained from setting goals for a segmentation strategy?

- Grow High Value Segments – Set goals around growing the strongest segments. Measure inbound campaigns to determine what messaging is bringing in the most leads to the highest value segments.
- Refine the Message – Set conversion goals for each campaign sent to each segment, and measure what messaging is resonating best with them.

- Convert More – Set conversion goals for specific segments and focus on driving the highest value leads to sales quicker.

Similar to the way a Fitbit will push someone toward their fitness targets, segmentation goals will drive a marketing team to push harder and motivate them to hit their targets.

## The Workout Plan - Determine What Data to Use

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Now that the fitness goals have been determined, what is actually needed to meet them? A change in diet? Special equipment? Asking these questions ahead of time will help to determine what is needed to make the fitness plan a success.

The same goes for segmentation. Before implementing a plan, a marketer needs to decide what criteria make up their top segments based on the goals that were decided upon, and what data is needed to break down those segments accordingly. This can be an overwhelming task as there are, what seems to be, countless of ways data can be broken down. However, taking a methodical approach can help alleviate this sometimes overwhelming task.



The key is to stay focused on the goals. Start with only the data necessary to build out a complete profile and allows leads to be easily dropped into the segments that the goals will be based on.

The act of building out segmentation can sometimes be a process of trial and error with a lot of “and’s” and “or’s”. This is the case with all marketing automation platforms. It is hard to tell how segments break down in respect to the entirety of your database. This generally lets a marketer see one tiny piece of the puzzle at a time, and requires them to test and modify time and time again until they feel they MAY have it right.

Visual segmentation can solve for this problem. Having the means to visually segment your data by simply dragging the fields you want onto a canvas allows marketers to see the big picture, avoid unnecessary complexity, and easily pick and choose the piece they want out of a diagram.

Having the ability to visually segment saves marketers valuable time and ensures that no leads get left out. Seeing a visual representation can also help identify pieces of a segment that may have been missed if it was not seen as a piece in the puzzle.

More marketers than ever are enjoying the benefits of visual segmentation. To learn more about how visual segmentation can benefit your team [click here](#).

# Make Room for the New - Data Cleansing

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The goals have been set, and it has been determined what is needed to meet those goals. Now there just needs to be some room for all that great new stuff. Time to clean all that junk food out of the fridge and cabinets and make room for some healthy new delights. And who needs a basement full of old boxes when that space could be filled with a Bowflex or a treadmill?



This goes for your database as well. Before bringing in all this clean new data, it is important to make sure all the junk is cleared out of the database. After all, segmentation is only as reliable as the data being used, and leaving all the junk in there is just going to interfere with any effort to accurately segment the data.

*According to Experian Data Quality's 2016 Global Data Management Benchmark Report, 23% of customer data is believed to be inaccurate. Additionally, there has been a sizeable increase in virtually all types of data errors over the past year.*

Think about that. If 23% of a company's data is bad, that is almost a quarter of the database that could be improperly segmented, meaning that many people are simply getting the wrong message. This results in:

- Higher unsubscribe rates
- Lower conversion rates
- A potentially ruined deliverability score which affects ALL emails getting through!

This is reason enough to think about a serious data cleansing. Although this can be a time consuming process, it will be well worth it in the end.

Maintenance is key as well. Now that all this clean data is going to be coming into your database, it has got to stay clean. Unfortunately, data inevitably degrades over time, but it's nothing that regular data audits can't prevent from clogging up a database. The key is to be proactive about keeping up data integrity. Doing so allows marketers to feel confident that they are maximizing their reach and getting the most out of their marketing campaigns.

## Go Shopping - Data Collection

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Finally! Now that there is room for all the food and equipment needed to support this health plan and you know how it is going to be used, it's time to go shopping. Everything else is in motion, it is just a matter of getting the stuff needed to execute the plan.

This goes for a solid segmentation strategy as well. Before the segmentation strategy can be executed, there is that all important final step. Collecting the data. This data usually comes from a few sources:

1. Forms – Forms are generally how marketing collects data regardless of the channel. Whether running an email campaign or gating pieces of content on a website, most marketing leads are ultimately going to be led to a form.



2. Manual Entry – This data will typically come from the sales side, and be entered into a CRM system. For instance, if a sales rep meets someone at a conference, and collects a business card, that data will be entered into a CRM manually

3. Mass Import – This is data that is brought into your database as a list of information, usually from a CSV. The sources of that data can be varied, such as a data aggregation service or a conference registration list. There may be a number of systems connected to a marketing automation platform, but usually the platform will facilitate the data collection through forms. Now that it has been determined how the data is going to be collected, it is critical that integrity is maintained as the data comes in. Using the three modes of data collection outlined above, measurements can be applied that allow a marketer to maintain integrity throughout the data collection process.

- Validation rules – When creating forms validation rules should be used, such as required fields, and limit text fields as much as possible. For example, make sure “Country” is a picklist rather than a text field. You wouldn’t believe how many variations there are for “United States” alone, not to mention the opportunities for misspellings.
  - Progressive profiling – Using progressive profiling on forms allows marketers to collect data little by little. This method limits the questions that are asked each time a lead fills out a form and they won’t have to answer the same question over and over. This can significantly increase the likelihood of a conversion.
  - Required data – When it comes to the manual entry side of things, it is important to make sure that a sales team is collecting all the proper information when entering data into the CRM. This can be enforced by requiring the respective fields be filled in when the record is created.
- Using the methods outlined above will ensure that data coming into the system is clean and accurate, and the marketer can feel confident that they are getting the most out of their segmentation.

## Conclusion

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Taking these four steps into consideration before implementing a segmentation strategy can give marketers a big advantage when it comes to getting the most out of their database. Much like a fitness plan, segmentation can be an intimidating project to take on. There are a lot of “and’s” and “or’s” that go into it. However, by taking a methodical approach and tackling one piece at a time in a logical order of progression makes it that much easier to understand and exponentially increase the chance of success.

As mentioned before, segmentation can be difficult for many marketing teams to wrap their heads around. One easy way to overcome the confusion and wasted time of trial and error that goes into developing segments is to use visual segmentation. 4Segments was developed to solve for this problem. It gives marketers more insight into their database by using visual models to display the segments they choose. This allows the marketer to see as few or as many segmentation breakdowns as they want, and then choose which segments they want to pull out, all with a click of the mouse.

Learn more about 4Segments™ [here](#).

**Building  
Stronger Segmentation**



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## Meet the Expert

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Marketers are essentially half artists and half scientists and most got into marketing due to the creative, visual side of it. They enjoy creating concepts and taking those concepts through to completion and then monitoring the results to make it more effective.

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**Mark LeVell**  
4Thought Marketing President

## About 4Segments™

4Segments enables Cross-Stack Segmentation™ using an innovative and simple-to use Visual Segmentation™ interface. A product by 4Thought Marketing, 4Segments is cloud-native, browser based, and works with every system in your Marketing Stack

### About 4Thought Marketing

We are a service and product innovator for Marketing Automation, having developed early cross-stack implementations and our breakthrough 4Segments™ for Visual Cross-Stack Segmentation™.

We go beyond tactical marketing automation implementations, making it a point to understand our customers' bigger objectives in order to deliver outstanding solutions that are not only technically excellent, but help them prove ROI.

Our services include: Cross-Stack Visual Segmentation™ | Marketing Automation Consulting & Best Practices | Marketing Automation Customization (Cloud Apps & add-ons) | Native & Custom CRM Integrations | Campaign Implementation Services | Data Management

For more information visit [www.4segments.com](http://www.4segments.com), call 1-888-356-7824, or email [info@4segments.com](mailto:info@4segments.com)