SEGMENTATION BEFORE INTEGRATION

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4Thought Marketing

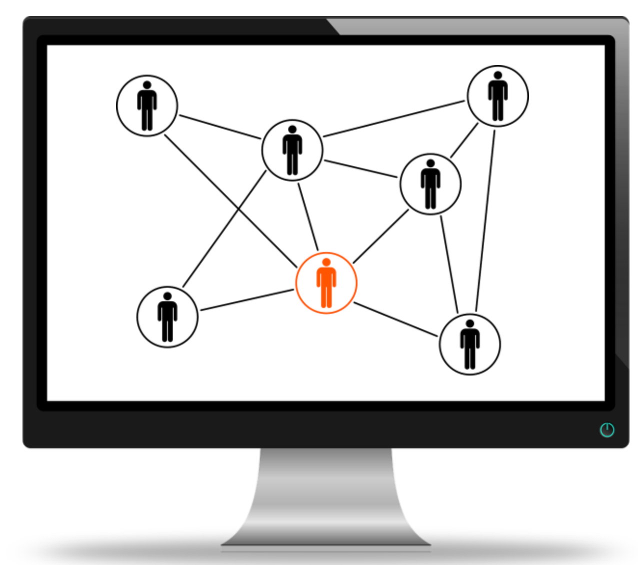
CONTENTS

INTRODUCTION

Segmentation Before Integration

When it comes to marketing technology integration, professionals know to keep the end goal in mind from the very beginning. By considering your segmentation targets before integrating your sales and marketing systems, you can focus on your work instead of worrying about making changes later. You and your team will stay operational in both the immediate and long-term future.

In this paper, we're going to look at a few different ways you can properly anticipate future segmentation goals prior to integration, both for B2C and B2B organizations.



PREDICTING THE FUTURE

Segmenting Beyond Your Current Abilities, System, & Data Structure

When it comes to painting a picture of the future, ask yourself a few simple questions:

- **What company groups do I want to reach?**
- **Who do I want to reach at those companies?**
- **What are their personas?**
- **Why do I want to reach them?**
- **What do I want my message to be?**

From there, you can get more data specific:

- **What fields identify those company groups?**
- **What job titles do my targets hold?**
- **What fields can I use to support these goals?**

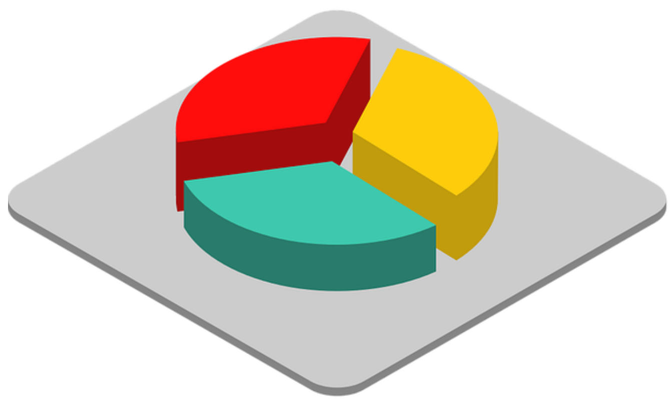
Asking yourself these questions allows you to figure out what fields you're going to need. After you determine the necessary fields, you then want to ensure your data elements are set up in order to segment and integrate those fields.

Currently, you probably have the bare-bones segmentation options in your marketing efforts. For example, a B2C company will typically segment according to the following at any stage of their current setup:

- **Interests**
- **Purchase History**
- **Birthday**
- **Geography**

B2B companies typically segment based on the following:

- **Job title**
- **Company size**
- **Industry**
- **Geography**



***Remember: It's okay to shoot for the stars**. You want to aim for the best possible result, even if it seems silly or unnecessary to consider all these variables at the current state of your marketing capabilities.*

SEGMENTING BASED ON BEHAVIOR

Now Things are Getting Interesting

Actions speak louder than words, which is why it's so vital to consider current and future behavioral segmentation requirements. For example, what happens when you begin incorporating social media? You'll want to segment based on customer behaviors like:

- **Mentioning your company on Twitter**
- **Navigating to your site via Facebook**
- **Sharing one of your posts**
- **Commenting on your blog**

When the time comes, are you going to be able to segment your lists based on whether or not they visited your website, and how recently? What about according to the content they viewed on your site, the keywords they used to find your site, the tags they clicked, how long they stayed, or how many pages they viewed? All of these are important to note.

Hint: *Look at the emails people are clicking through and the web pages they're visiting afterwards. This information can let you create several behavioral segmentations immediately.*

Other behavioral targeting examples include:

- **Campaign response**: This allows you to target campaigns based on buyer response to past efforts. For example, if one group of consumers always responds to event invitations but never responds to download offers, target them separately.
- **Re-emailing**: If prospects are not opening your emails, follow up with them using alternate subject lines a few days later. Do the same for prospects that did not take action. Provide a revised version of your offer.
- **Open rate**: What if a particular prospect hasn't opened your emails for a long time? This allows you the ability to initiate trigger campaigns. For instance, you can send an email with a message like, "A while back we had discussed your interest. Here's more information for you to consider."
- **Competitors**: Sometimes you need to gain back prospects that have deviated to a competitor. For example, "We have a special offer for clients of <competitor>. Approximately a year ago you thought about purchasing our product, but decided to go with <competitor>. Here's a list of features that you don't have with them, which you could have with us."
- **Content interactions**: For instance, if your prospect uses a mortgage calculator on a website for a financial service company, it's safe to say they are interested in mortgage products. The way people interact with content says a huge amount about who they are and what they're truly going to take advantage of.
- **Products owned**: This allows you to focus on a specific product purchased. For example, "Thank you for your purchase! Here's a related FAQ we'd like you to consider." You can then follow up a couple of weeks later thanking them again for the purchase and offering a few advanced tricks they may not know.
- **Purchase anniversary**: This is a fantastic way to nurture your customers. For example, you can send an email 60 days after someone purchased a product and verify their satisfaction. You can do it on the one year anniversary of a purchase as well, especially if it's a subscription-based service.

Behavioral targeting is incredibly valuable for integration. Additionally, thinking of the above segmentation possibilities allows you to create the forms necessary for long-term success in your integration now instead of one at a time down the road.

You may not need to segment for these customer behaviors now. But do you expect to require these segmentation fields in the future? The odds are good that you will. Most organizations discover that as their marketing automation and CRM integrations become more sophisticated, they need to segment based on these factors and many more. Having that capability already in place creates uniformity between your marketing automation and CRM software as well as throughout your organization.

YOUR DATA & SEGMENTATION GOALS

Cleaning Up Your Data

After you've determined your segmentation goals, it's important to ensure that your data is clean prior to any integration work. For example, let's say you want to segment on some new target industries that are important to a new product line. Let's consider "Healthcare and Government" as our example. When you examine your industry data, you quickly discover two problems:

- **Healthcare isn't an industry selection option at all!**
- **Government is available as both federal, gov, gov., and government.**

Before you go further, you obviously need to update this field and clean the data.

Dirty data can be sneaky. For example, the following expressions all seem to mean the same thing:

- California, CA, Cali
- VP, V.P., Vice President.

However, each of these expressions categorized as individual entries within marketing automation and CRM software creates duplicate or inconsistent data.

Think of dirty data as the sludge that gums up your marketing engine, causing your system to run slowly and ineffectively. The above examples are only a tiny part of what dirty data entails. To learn more about dirty data and the subtle damage it can do, check out our materials on the topic.

CREATE A BUYER PERSONA

Know Your Customer

When you sort your contacts into buyer personas and/or buyer groups, you can then create subsets of contacts. This allows you to see the interests, buying cycles, and value propositions for each group.

By identifying the buyer groups in advance, you can make sure you have the appropriate fields to identify them in your database, and then integrate those fields.

SETTING UP YOUR INTEGRATION

Put the Plan Into Action

It's finally time to put your data to use. The process should look something like this:

1. **Verify that your primary data flows are correct**. If you are setting up the integration to only move data to CRM, and not back to your MA system, you may have to change your segmentation plan.
2. **Ensure that the high-level data sets you are moving are correct**. If the integration team decides there's no reason for partners to move to the MA system, and you need to segment on partners, you're in trouble!
3. **Check your data overwrite rules**. Old data overwriting new valuable data will only create segments of junk.
4. **Map your fields in correlation with the data work you've done**.
5. **During testing, don't just check your contact data moving back and forth. Try to create some segments**. See if you've achieved some of those segmentation goals in your MA system on a test basis and if you can make it work in real life segmentation scenarios.

As your business needs evolve, your integrated tools will require new data sets and you will need new ways to segment, which will involve access to new CRM fields. When your sales/marketing department wants trackable information by adding new fields, this also must be added into the other side of the integration. By doing these things ahead of time, you'll save a lot of time and money.

CONCLUSION

Considering your buyer personas and the various ways you want to slice and dice your database in advance allows you to set up your fields and data and then integrate that data. When you do this, your integration will serve you over the long term and you will be able to clearly accomplish the marketing goals that you and your team require.

This is the difference between attempting to build a road by only looking two feet in front of you, and building a road by looking at where you want to end up. One option takes more time and more work because you're only thinking in short-term steps and dealing with problems as they arise, while the other provides you with a clear plan from start to finish before beginning the actual process. A successful company should always choose the path with long-term benefits.

SEGMENTING LIKE A PROFESSIONAL

If you need help anticipating future buyer groups, data sets, forms, and other segmentation issues prior to integration, contact the team at 4Thought Marketing – we can provide!

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