



Kentico

Segmentation

Quick Start Guide

www.kentico.com

What Is Segmentation?

Segmentation is the marketing practice of dividing a customer base into similar groups based on psychographic or behavioral attributes, such as age, gender, interests, purchase behavior or a lifecycle stage. Segmentation allows a company to optimize product offerings, marketing, and sales approaches to meet the specific requirements of defined segments.

... And What Is a Marketing Persona?

Personas are archetypal characters created to represent different types of customers you come across in your marketing and sales process. They usually contain information about users' demographics, buying behavior, interests, and goals. They are often combined with market segmentation to represent specific customers.

Why Do I Need Segmentation?

A well-defined segmentation approach allows you to better satisfy customers in a shorter time. As a result, prospects are more likely to purchase, close faster, produce bigger deals, and remain more loyal.

For marketing, well-defined segments mean more targeted messages and programs that resonate with buyers. The end result is higher response rates, better engagements, shorter conversion cycles, and a better return on marketing investment.

... And Why Do I Need a Marketing Persona?

Personas will help you better understand your customers' motivations, desires, and fears. They will help your entire company think more about the customer when it comes to designing new services, products, or a company website and its content.

Segmentation – Basic Techniques

- Have a look at your analytics – what do you know about your customers already?
- Align teams such as sales, marketing, and customer success to learn more about your common target audience.
- Ask your customers – conduct interviews if you need to get more insights.
- Create personas and define customer segments based on key segmentation markers.

Segmentation – Advanced Techniques

- Dynamically assign contact groups based on key attributes and behaviors.
- Use email and website personalization for key segments or personas.

Top Resources

What is Contact Management, and How Do I Use It?:

<https://www.kentico.com/what-is-contact-management>

The Secret to an Intelligent Content Strategy:

<https://www.kentico.com/intelligent-content-strategy>

Kentico Segmentation – Quick Start

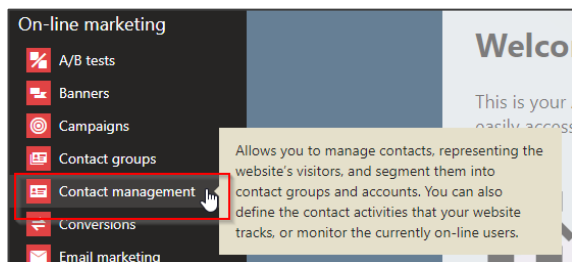
When it comes to contact segmentation, Kentico allows you to make use of **Accounts**, **Contact groups**, and **Personas**.

Accounts

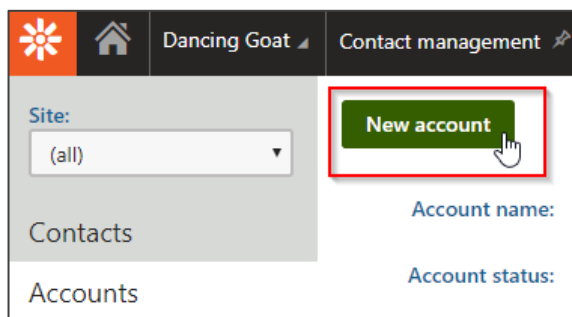
Accounts are typically organizations or other entities where contacts operate. Individual contacts can belong to multiple accounts.

You can create accounts in the **Contact management** application.

1. In the administration interface, open the Applications list and click **Contact management**.



2. Next, switch to the **Accounts** tab and click **New account**.

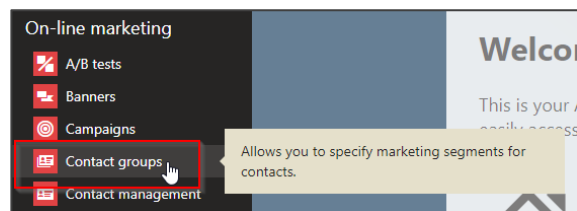


Contact Groups

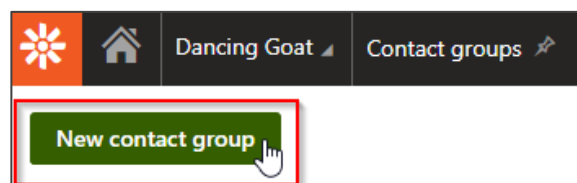
Contact groups will allow you to divide your site visitors based on shared characteristics and use them in your marketing efforts, e.g., wake up inactive newsletter subscribers, talk to contacts interested in your Partnership program or those who downloaded a whitepaper from your website.

You can set up customer segments in the **Contact groups** application.

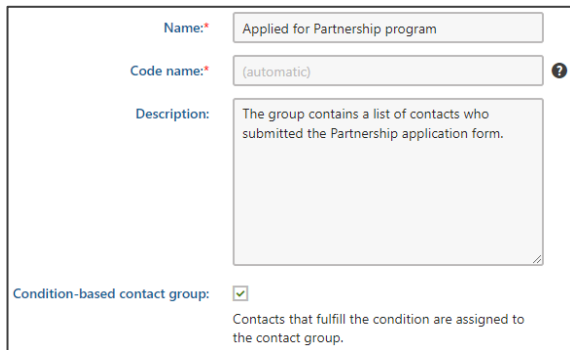
1. In the administration interface, open the Applications list and click **Contact groups** under the Online marketing category.



2. Create a new contact group by clicking the **New contact group** button.



3. Enter your contact group name and add a description. Check the box **Condition-based contact group** in order to set a dynamic condition.



Name: Applied for Partnership program

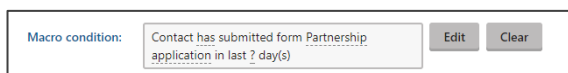
Code name: (automatic)

Description: The group contains a list of contacts who submitted the Partnership application form.

Condition-based contact group: ☒ Contacts that fulfill the condition are assigned to the contact group.

4. Condition-based contact groups are defined through a macro condition. The system will add contacts to the group automatically once the condition is fulfilled.

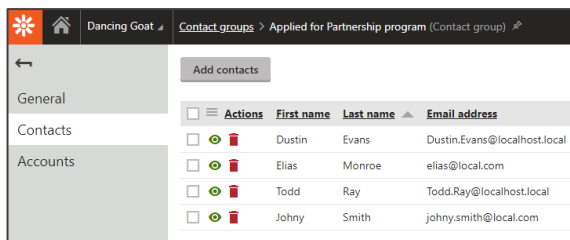
Click **Edit** to select the most suitable condition for your contact group. You can either use built-in or custom macros.



Macro condition: Contact has submitted form Partnership application in last 7 day(s)

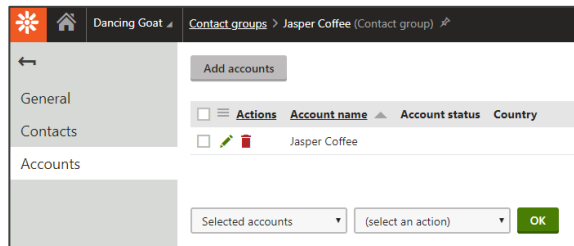
Edit Clear

5. Click **Save** and switch to the **Contacts** tab to see who fell into the group.



Actions	First name	Last name	Email address
<input type="checkbox"/>	Dustin	Evans	Dustin.Evans@localhost.local
<input type="checkbox"/>	Elias	Monroe	elias@local.com
<input type="checkbox"/>	Todd	Ray	Todd.Ray@localhost.local
<input type="checkbox"/>	Johny	Smith	johny.smith@local.com

6. You can also assign whole accounts to contact groups and work with the contact group further in your marketing efforts.



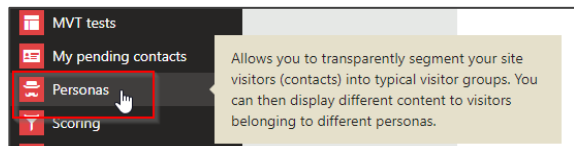
Actions	Account name	Account status	Country
<input type="checkbox"/>	Jasper Coffee		

Selected accounts (select an action) OK

Personas

Personas will help you create profiles representing your ideal customers. In marketing, having personas in place will allow you to create highly-targeted content and personalize your marketing activities.

1. In the administration interface, open the Applications list and click **Personas** under the Online marketing category.



MVT tests

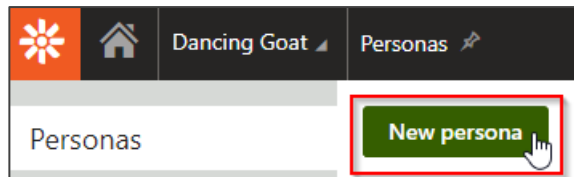
My pending contacts

Personas

Scoring

Allows you to transparently segment your site visitors (contacts) into typical visitor groups. You can then display different content to visitors belonging to different personas.

2. Create a new persona by clicking the **New persona** button.

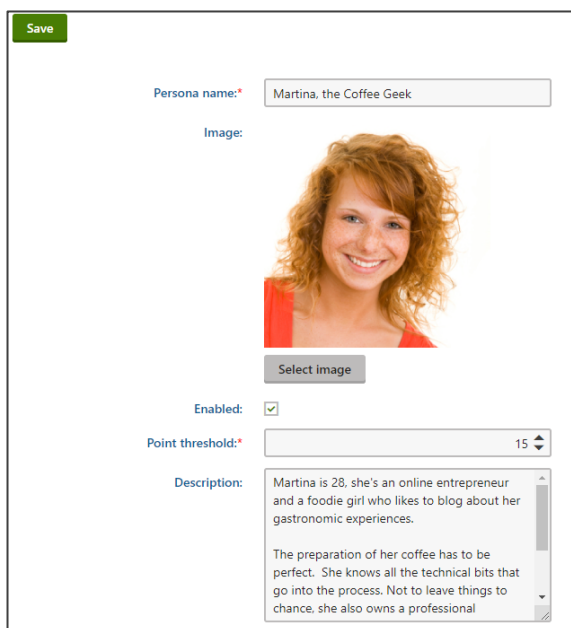


Personas

New persona

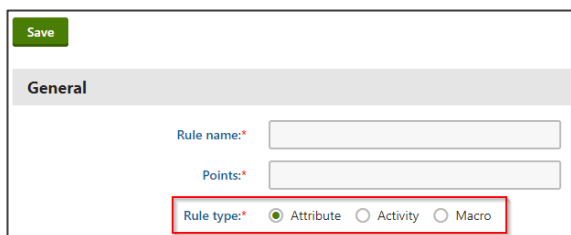
3. Enter your **Persona name** and add other details such as an **Image** or **Description**.

You will also have to define a **Point threshold**. That is the number of points the contact has to reach to be assigned to this persona.



4. Switch to the **Rules** tab. You will now define the rules for the threshold.

There are three types of rules in Kentico:

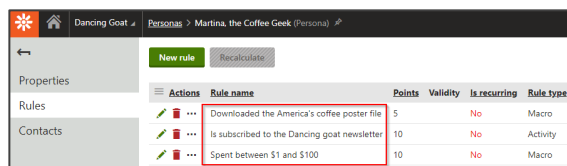


Attributes - typically based on information provided by website visitors via online forms, such as their Telephone Number, Email, or Job Title. You can either use built-in attributes or create your own ones.

Activities - based on activities that the user completed on the website or in your emails, such as Page Visit, Newsletter Subscription, or Form Submission. Again, you can either use built-in or custom activities.

Macro rules - based on a dynamic condition, thus they will help you define more complex rules, combining multiple Attributes and/or Activities.

5. The **Rules** tab shows a list of all rules you created to define your persona.



Actions	Rule name	Points	Validity	Is recurring	Rule type
Downloaded the America's coffee poster file		5	No	No	Macro
Is subscribed to the Dancing goat newsletter		10	No	No	Activity
Spent between \$1 and \$100		10	No	No	Macro

6. To see all contacts who reached the personas Point threshold, switch to the **Contacts** tab.



Actions	First name	Last name	Email address
	Monica	King	monica.king@localhost.local

Once you have created your contact groups and personas, you can make use of it in various areas in Kentico – in **content personalization** on your website, **marketing automation** or in **email marketing**.