LIST SEGMENTATION

Create Targeted Lists That Get Results

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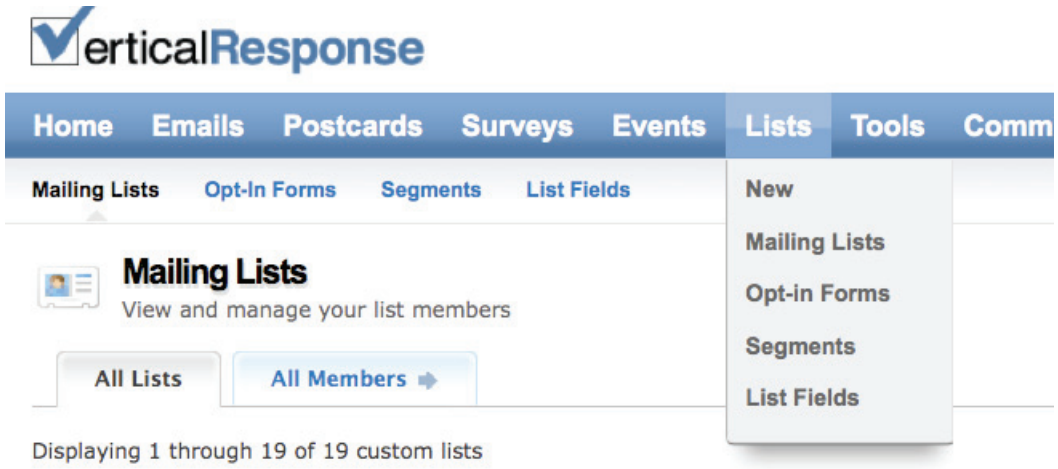
Quick Overview

What is List Segmentation?

The List Segmentation feature enables you to create new, unique mailing lists from the data found on your existing mailing lists, and the results of your sent email campaigns. You can “slice & dice” your data to create new targeted mailing lists based on the specific criteria that you set.

Where do I access the List Segmentation feature?

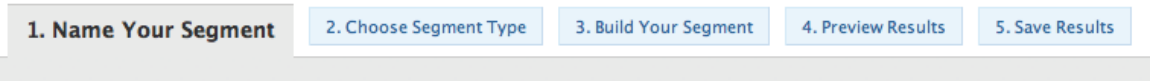
Simply log into your account and scroll over the List tab on the blue navigation bar. You will see the **Segments** option in the drop down menu. Just click on it to get started.



5 Simple Steps for Creating Segments

The List Segmentation feature was designed to meet the needs of all users. The tool can handle both basic and complex queries with ease. In this section we'll cover the steps you'll need to follow to build and run your target segment.

Create Your Segment in 5 Steps:



1 Name Your Segment:

Give it a name and brief description for quick reference.

2 Choose Segment Type:

Select one of the following options:

- Create a Simple Segment using a single data source (Lists or Campaigns)
- Create an Advanced Segment using multiple data sources (Lists, Campaigns & Saved Segments)
- Mass Merge Your Data – Technically it's not segmentation but it's a nice tool for merging multiple lists or campaign audiences into a single mailing list

3 Build Your Segment:

Use filters and rules to define your segmentation criteria.

4 Preview Results:

View a snapshot of your results set, go back and edit your segment or proceed to save the results.

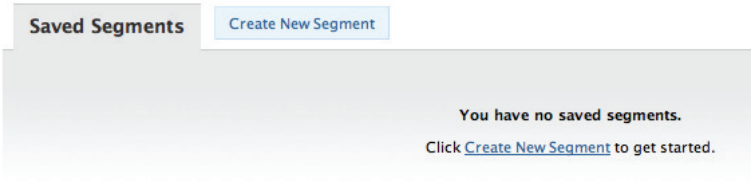
5 Save Results:

Load your results as a new mailing list, split the results into randomized chunks or take a "slice" of the total result set.

Creating a new Simple Segment
List Members Only

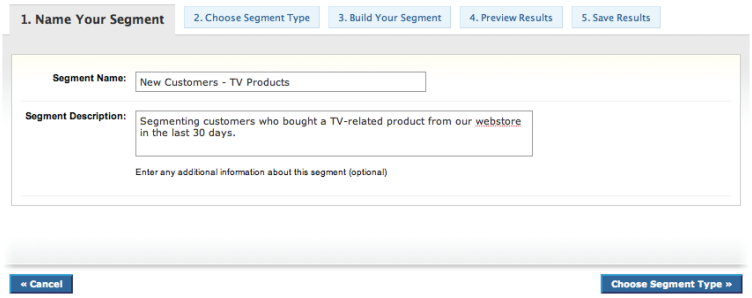
Getting Started:

To begin, click on the Segment option within the List section. You will see the Saved Segments box, which will be empty, so go ahead and click “Create New Segment” to get started.



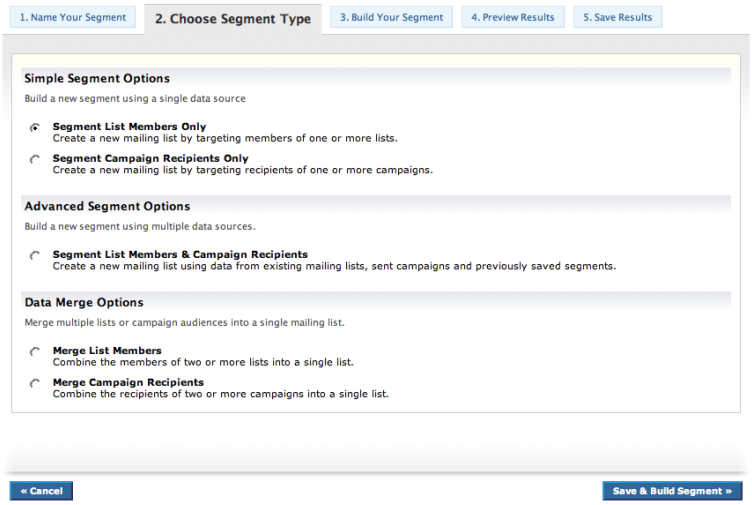
Name Your Segment:

On this step you will give your segment a name (required) as well as description (optional). The description field is useful as you’ll be able to add additional information that explains the rationale or business rules behind the segment if you need to reference this in the future.



Choose Segment Type:

On this step you’ll be presented with a few options, some simple and some more advanced. For this example we’ll choose one of the Simple Segment Options, specifically **Segment List Members Only**.



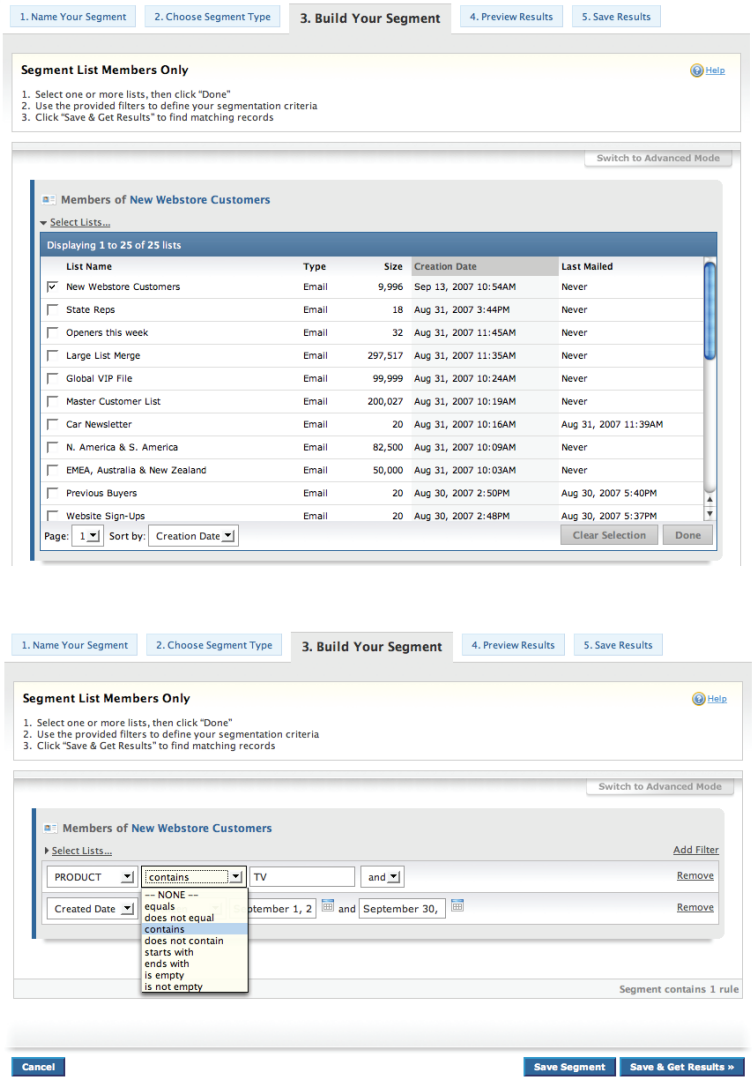
Creating a new Simple Segment - List Members Only

Build Your Segment:

Now it's time to begin the segmentation process and the first step is to select one or more mailing lists. Simply check the box next to the list(s) you'd like to segment and then click the "Done" button. You will then see the list selector page collapse and the segmentation filters will appear.

With the provided filters, use any of the standard or custom fields in your list(s) to build your segment. After you've selected your field, you can then choose an operation (i.e. contains, equals, starts with, etc) that will enable you to fine-tune your results. Lastly, input your specific search criteria into an empty text box and you're ready to go.

You can easily add additional filters to your segment by clicking the "Add Filter" link and just as quickly remove filters that are not needed. Once you've finished defining your segmentation criteria, click the Save & Get Results button to proceed.



Creating a new Simple Segment - List Members Only

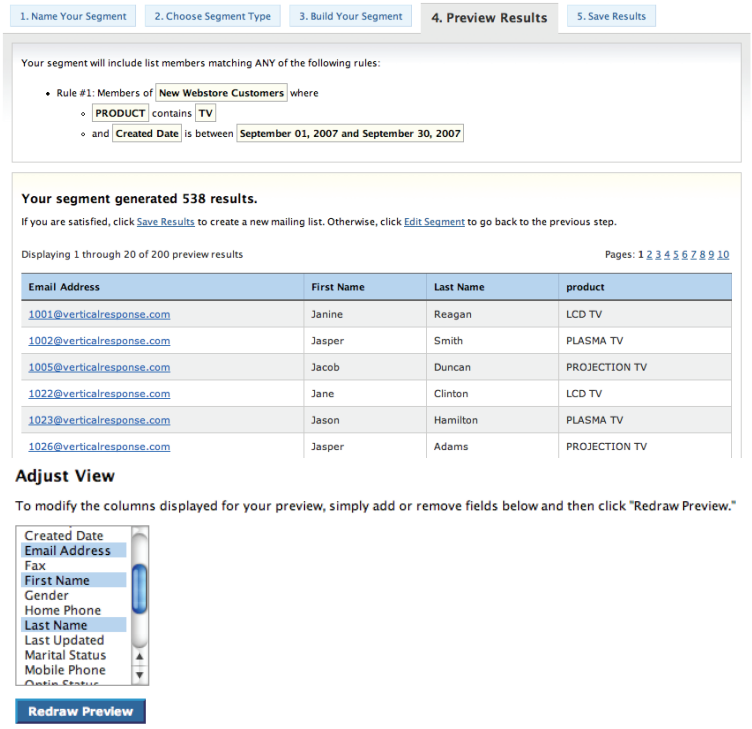
Preview Results:

On this step you'll be able to see a snapshot of your segment results and it's helpful to use this as a checkpoint during the segment building process.

Carefully review your results and then decide if you'd like to go back and modify your segmentation criteria (expand or restrict the results) or move forward and save the data as a new mailing list.

In addition, the default preview will display columns for First Name, Last Name, Email Address and any standard or custom fields that were used in your segmentation criteria (i.e. PRODUCT).

If you'd like to add/remove columns to customize your preview, simply use the Adjust View tool. Select the fields you wish to see and then click Redraw Preview. Once you are ready to proceed and save your segment, click the "Save Results" link or button to move on to the next step.



Creating a new Simple Segment - List Members Only

Save Results:

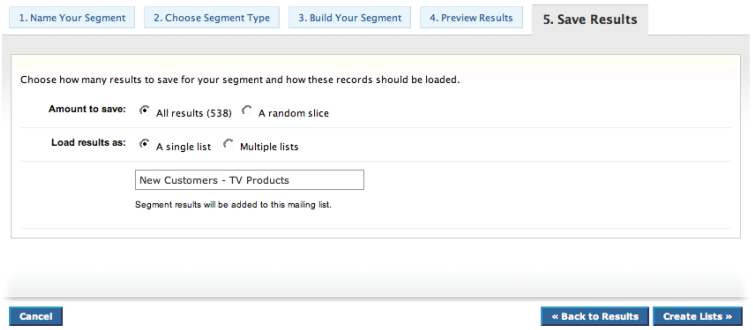
There are a variety of options for saving your segment results. You can choose the amount of results to save as well as how this data should be loaded as a new list(s).

In addition, the segment you defined will also be saved for future use or reference and it can be found in the Saved Segments area of your account.

Let's cover all of the segment saving options below:

1. Save All Results – As a Single List

Choose this option if you want to create a new mailing list that contains all of the records returned for your segment. Click the "Create Lists" button and a single mailing list will be loaded in the Mailing List Management section of your account.



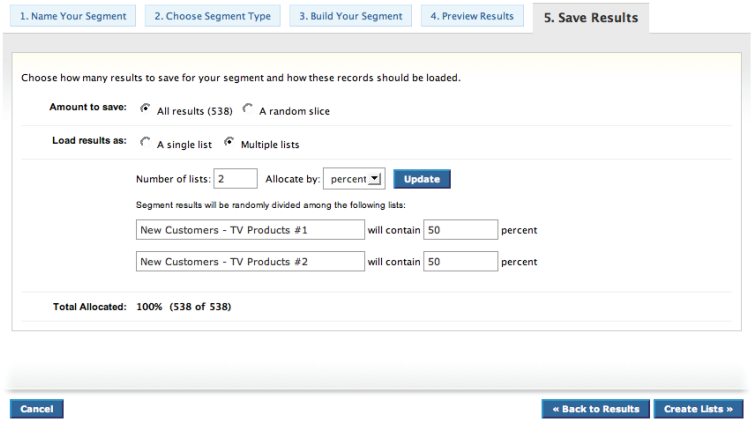
2. Save All Results – As Multiple Lists

Choose this option if you want all of the records returned for your segment divided into a specific number of randomized lists. The default will be set to 2 lists (i.e. A/B split) but you can increase the number by entering a new value in the text box and clicking the Update button.

In addition, you can also toggle the allocation view for your lists to show either percentages or record counts. For example, a segment of 100,000 records could be split into 4 randomized lists and displayed as:

25% + 25% + 25% + 25% = 100% Or 25,000 + 25,000 + 25,000 + 25,000 = 100,000.

Click the "Create Lists" button and the data will then be loaded as multiple lists in the Mailing List Management section of your account.

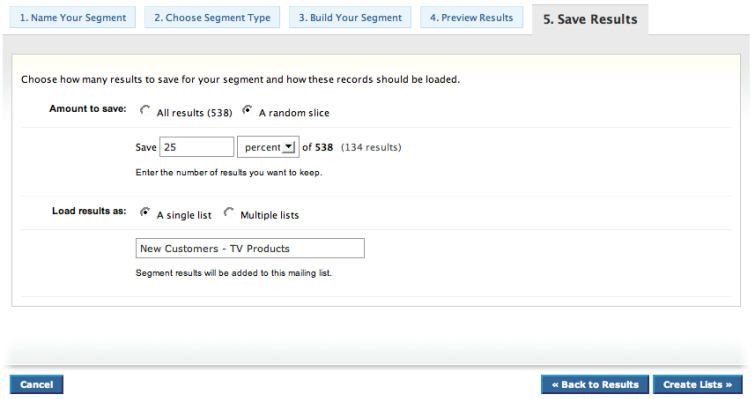


Creating a new Simple Segment - List Members Only

3. Save a Random Slice – As a Single List

Choose this option if you'd like to save only some of the records from your segment results and have this data loaded as a single mailing list.

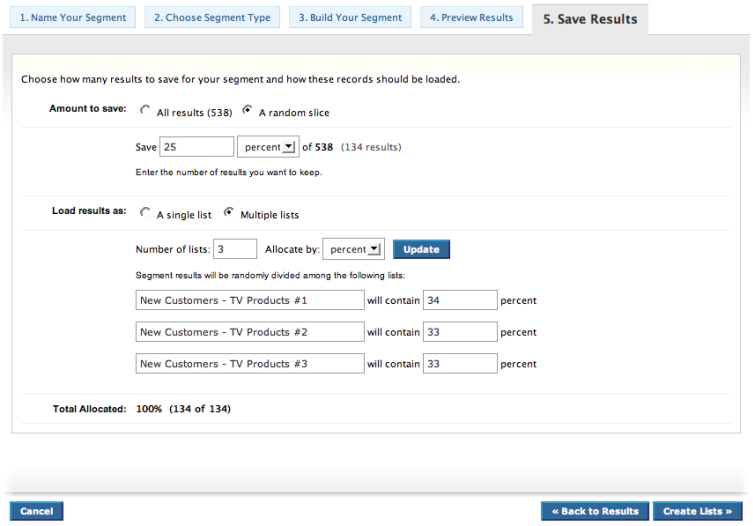
You can enter a percentage (i.e. 10% or 35%) or an exact record count (i.e. 15,000 or 45,500). Click the "Create Lists" button and a single mailing list will be loaded in the Mailing List Management section of your account.



4. Save a Random Slice – As a Multiple Lists

Choose this option if you'd like to save only some of the records from your segment results and have this data loaded as multiple mailing lists. You can enter a percentage (i.e. 10% or 35%) or an exact record count (i.e. 15,000 or 45,500) and this data will then be allocated into 2 or more lists.

The default will be set to 2 lists (i.e. A/B split) but you can increase the number by entering a new value in the text box and clicking the Update button.



In addition, you can also toggle the allocation view for your lists to show either percentages or record counts. For example, a segment of 100,000 records could be split into 4 randomized lists and displayed as:

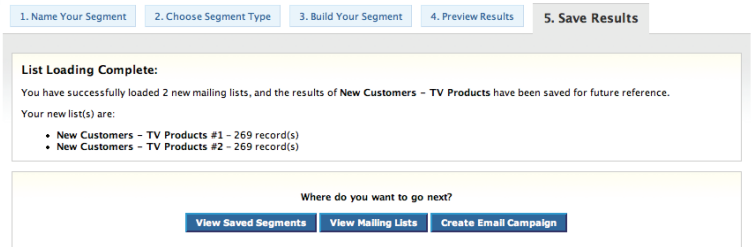
25% + 25% + 25% + 25% = 100% Or 25,000 + 25,000 + 25,000 + 25,000 = 100,000.

Click the "Create Lists" button and the data will then be loaded as multiple lists in the Mailing List Management section of your account.

Creating a new Simple Segment - List Members Only

Post-Save Options:

After you've loaded your mailing list you will see a summary page which notes the number of mailing lists that were loaded and provides some informational text regarding your newly saved segment.

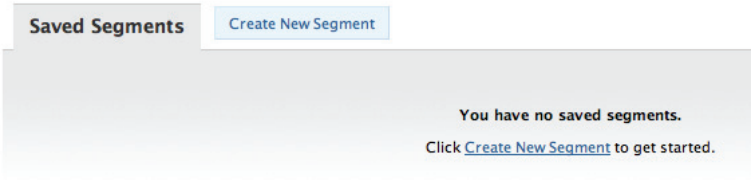


At this point you'll have the option to go back to the Saved Segments page, view your existing Mailing Lists or begin the creation of a New Email Campaign. Simply click the button that meets your needs.

Creating a new Simple Segment
Campaign Recipients Only

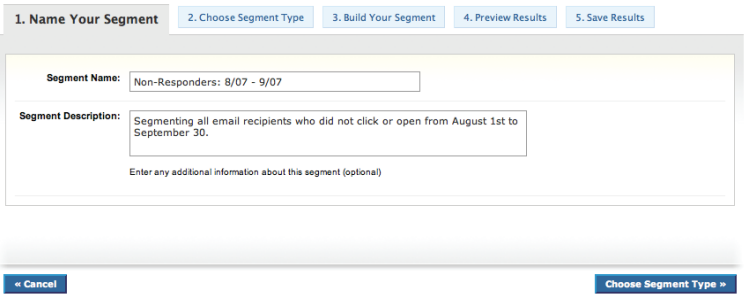
Getting Started:

To begin, click on the Segment option within your List section You will see the Saved Segments box, which will be empty, so go ahead and click “Create New Segment” to get started.



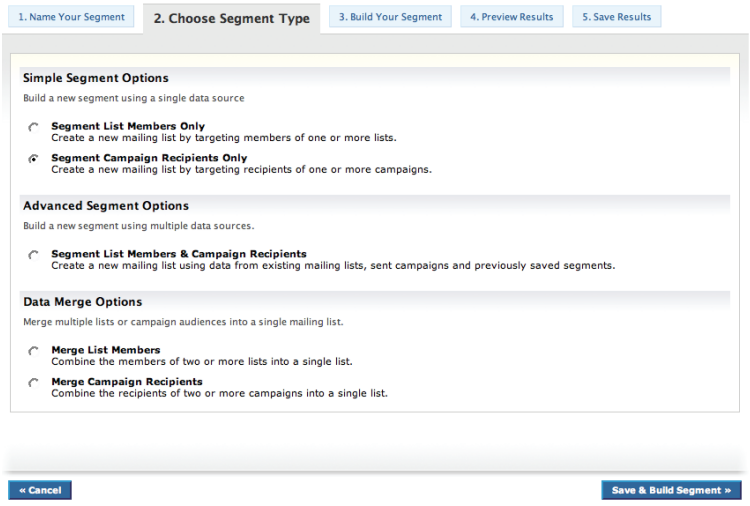
Name Your Segment:

On this step you will give your segment a name (required) as well as description (optional). The description field is useful as you’ll be able to add additional information that explains the rationale or business rules behind the segment if you need to reference this in the future.



Choose Segment Type:

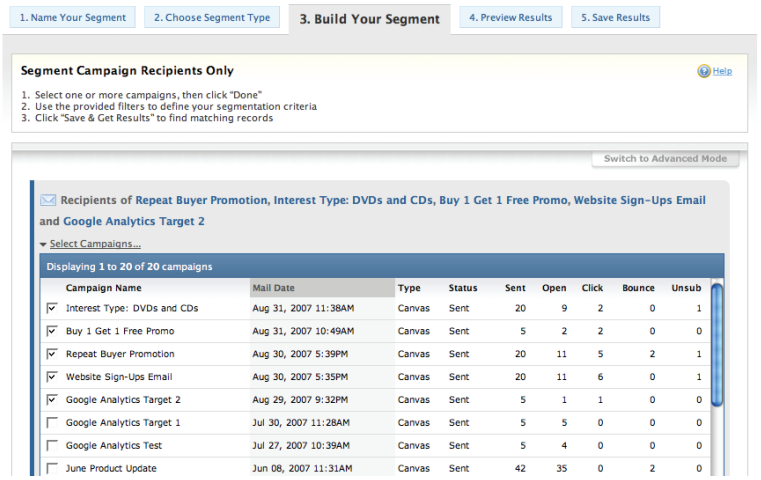
On this step you’ll be presented with a few options, some simple and some more advanced. For this example we’ll choose one of the Simple Segment Options, specifically **Segment Campaign Recipients Only**.



Creating a new Simple Segment - Campaign Recipients Only

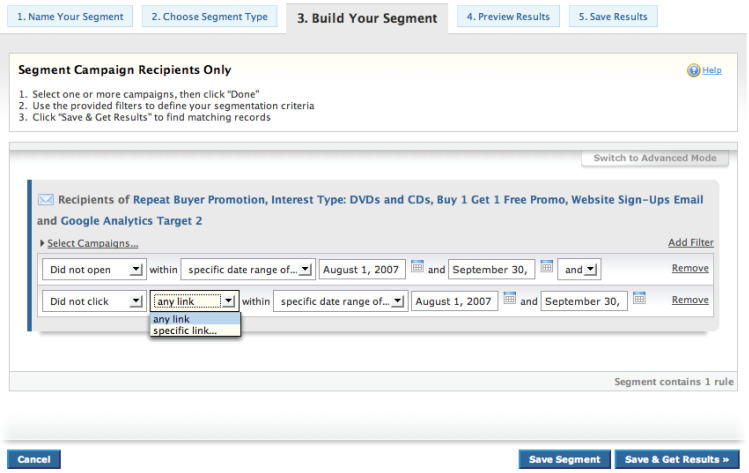
Build Your Segment:

Now it's time to begin the segmentation process and the first step is to select one or more email campaigns. Simply check the box next to the campaign(s) you'd like to segment and then click the "Done" button. You will then see the campaign selector page collapse and the segmentation filters will appear.



With the provided filters, use any of the standard or custom fields in your campaigns to build your segment. In addition, you will also be able to choose from campaign response types such as Opened, Clicked, Did not Open, Did not Click, etc.

After you've selected your field, you can then choose an operation (i.e. contains, equals, starts with, etc) that will enable you to fine-tune your results. Lastly, input your specific search criteria into an empty text box and you're ready to go.



You can easily add additional filters to your segment by clicking the "Add Filter" link and just as quickly remove filters that are not needed. Once you've finished defining your segmentation criteria, click the Save & Get Results button to proceed.

Creating a new Simple Segment - Campaign Recipients Only

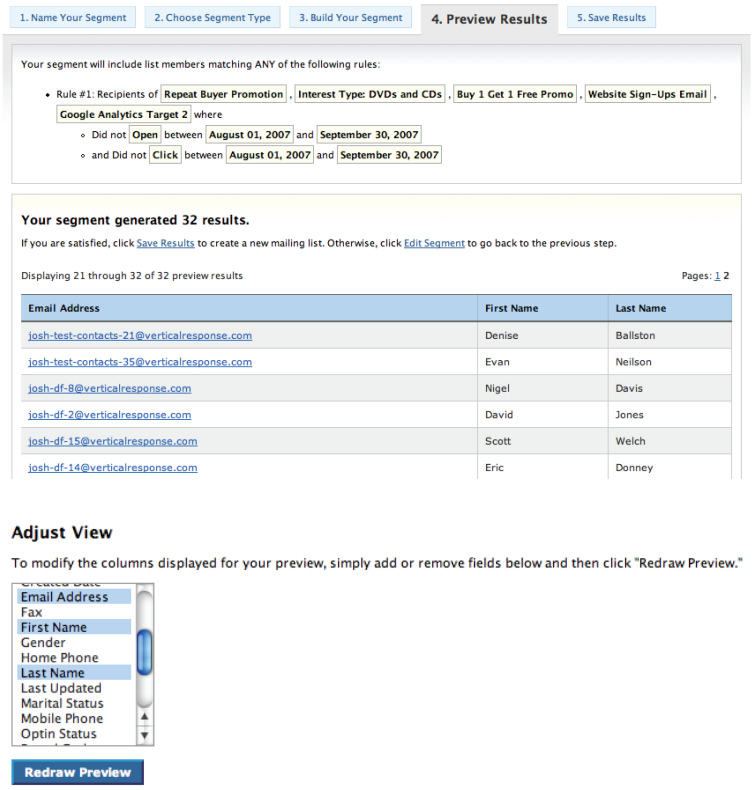
Preview Results:

On this step you'll be able to see a snapshot of your segment results and it's helpful to use this as a checkpoint during the segment building process.

Carefully review your results and then decide if you'd like to go back and modify your segmentation criteria (expand or restrict the results) or move forward and save the data as a new mailing list.

In addition, the default preview will display columns for First Name, Last Name, Email Address and any standard or custom fields that were used in your segmentation criteria (i.e. COMPANY_NAME).

If you'd like to add/remove columns to customize your preview, simply use the Adjust View tool. Select the fields you wish to see and then click Redraw Preview. Once you are ready to proceed and save your segment, click the "Save Results" link or button to move on to the next step.



Creating a new Simple Segment - Campaign Recipients Only

Save Results:

There are a variety of options for saving your segment results. You can choose the amount of results to save as well as how this data should be loaded as a new list(s).

In addition, the segment you defined will also be saved for future use or reference and it can be found in the Saved Segments area of your account.

Let's cover all of the segment saving options below:

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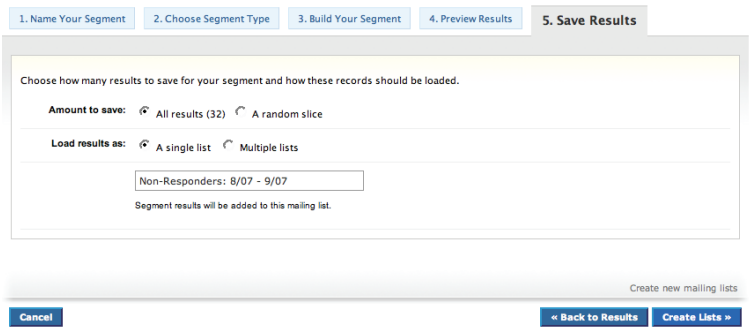
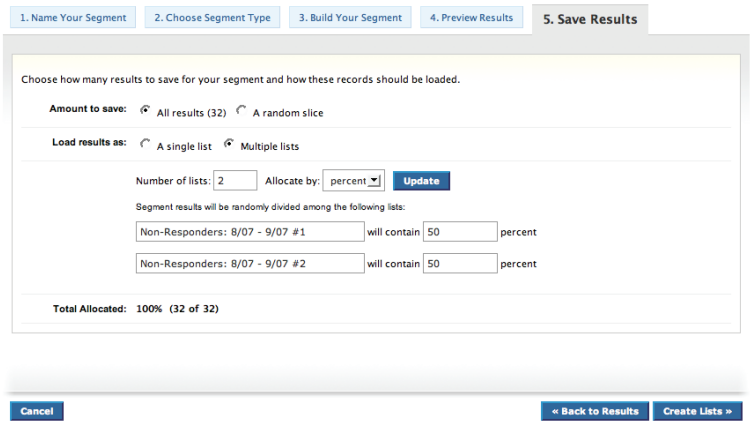


2. Save All Results – As Multiple Lists

Choose this option if you want all of the records returned for your segment divided into a specific number of randomized lists. The default will be set to 2 lists (i.e. A/B split) but you can increase the number by entering a new value in the text box and clicking the Update button.



In addition, you can also toggle the allocation view for your lists to show either percentages or record counts. For example, a segment of 100,000 records could be split into 4 randomized lists and displayed as:

25% + 25% + 25% + 25% = 100% Or 25,000 + 25,000 + 25,000 + 25,000 = 100,000.

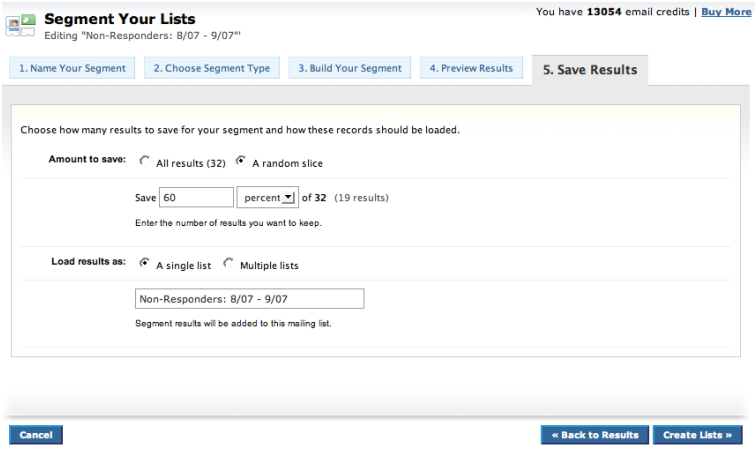
Click the "Create Lists" button and the data will then be loaded as multiple lists in the Mailing List Management section of your account.

Creating a new Simple Segment - Campaign Recipients Only

3. Save a Random Slice – As a Single List

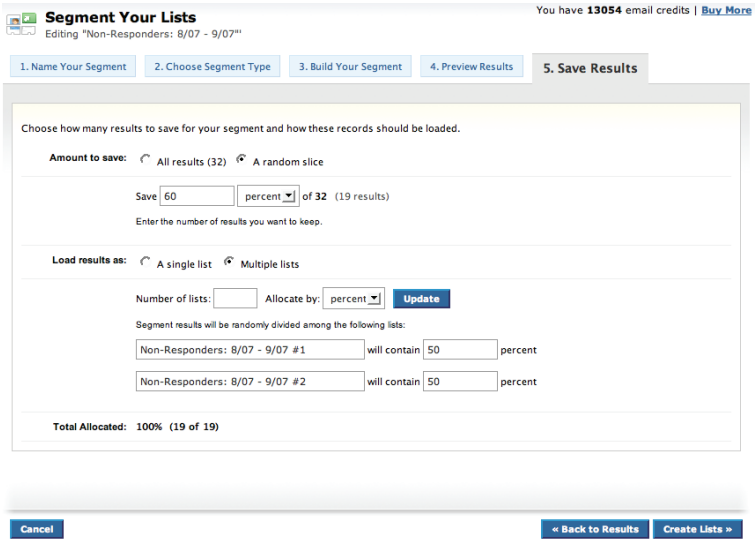
Choose this option if you'd like to save only some of the records from your segment results and have this data loaded as a single mailing list.

You can enter a percentage (i.e. 10% or 35%) or an exact record count (i.e. 15,000 or 45,500). Click the "Create Lists" button and a single mailing list will be loaded in the Mailing List Management section of your account.



4. Save a Random Slice – As a Multiple Lists

Choose this option if you'd like to save only some of the records from your segment results and have this data loaded as multiple mailing lists. You can enter a percentage (i.e. 10% or 35%) or an exact record count (i.e. 15,000 or 45,500) and this data will then be allocated into 2 or more lists.



The default will be set to 2 lists (i.e. A/B split) but you can increase the number by entering a new value in the text box and clicking the Update button.

In addition, you can also toggle the allocation view for your lists to show either percentages or record counts. For example, a segment of 100,000 records could be split into 4 randomized lists and displayed as:

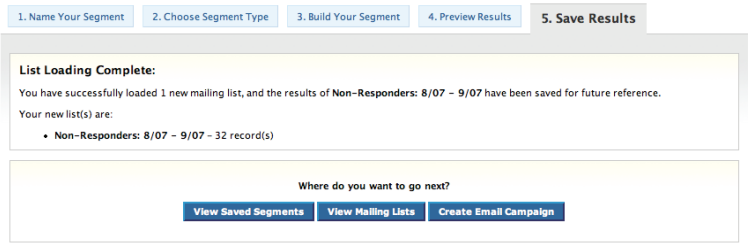
25% + 25% + 25% + 25% = 100% Or 25,000 + 25,000 + 25,000 + 25,000 = 100,000.

Click the "Create Lists" button and the data will then be loaded as multiple lists in the Mailing List Management section of your account.

Creating a new Simple Segment - Campaign Recipients Only

Post-Save Options:

After you've loaded your mailing list you will see a summary page which notes the number of mailing lists that were loaded and provides some informational text regarding your newly saved segment.



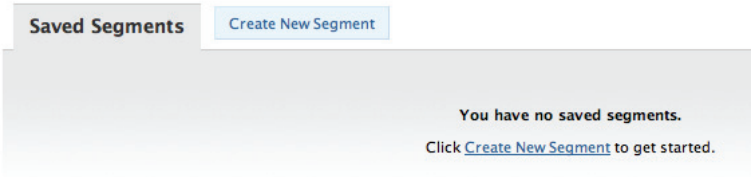
At this point you'll have the option to go back to the Saved Segments page, view your existing Mailing Lists or begin the creation of a New Email Campaign. Simply click the button that meets your needs.

Creating a new Advanced Segment

List Members & Campaign Recipients

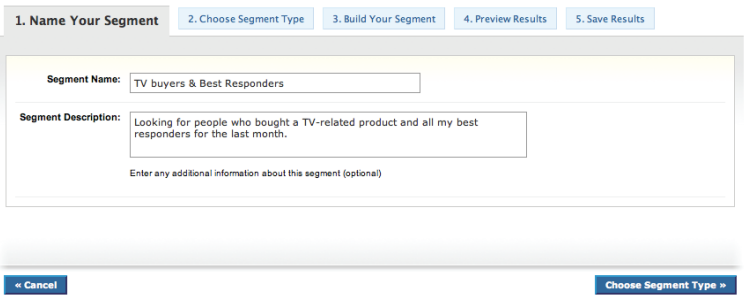
Getting Started:

To begin, click on the Segment option within your List section. You will see the Saved Segments box, which will be empty, so go ahead and click "Create New Segment" to get started.



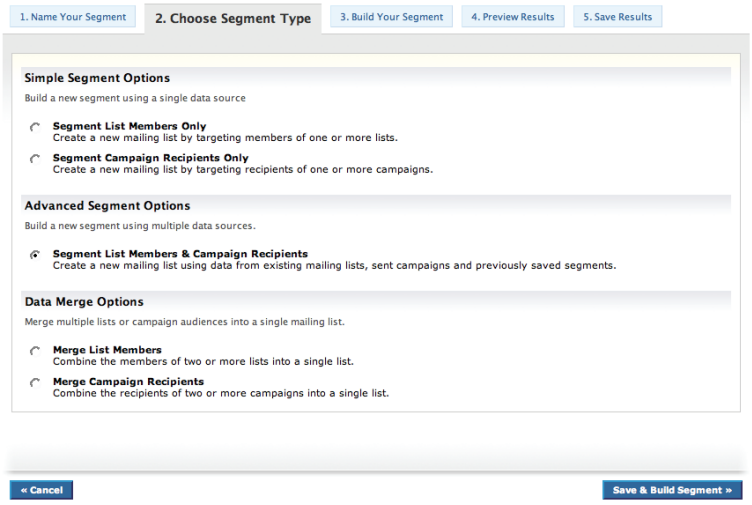
Name Your Segment:

On this step you will give your segment a name (required) as well as description (optional). The description field is useful as you'll be able to add additional information that explains the rationale or business rules behind the segment if you need to reference this in the future.



Choose Segment Type:

On this step you'll be presented with a few options, some simple and some more advanced. For this example we'll choose the Advanced Segment Options, specifically **Segment List Members & Campaign Recipients**.

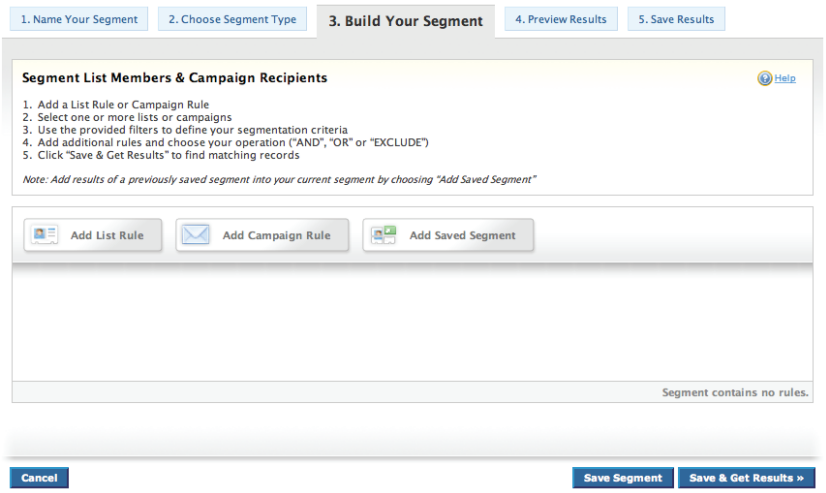


Creating a new Advanced Segment - List Members & Campaign Recipients

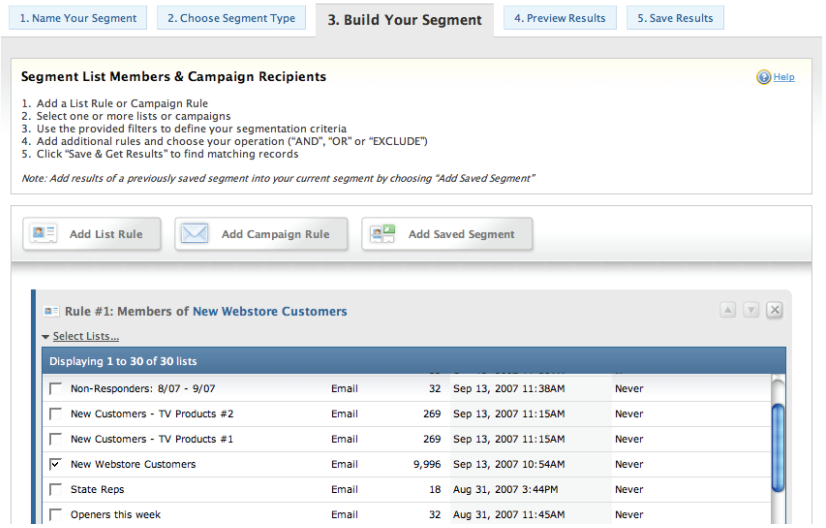
Build Your Segment:

Now it's time to begin the segmentation process. You will see 3 icons that will enable you to choose the data sources to be included in your segment: Add List Rule, Add Campaign Rule and Add Saved Segment. With the Advanced Segment option you can create complex segments by joining multiple rules together and linking them with operations such as "AND", "OR" and "EXCLUDE."

Simply click one of the data source icons to get started. In this example we'll explain how to build an advanced segment using both a List Rule and a Campaign Rule.



First, click "Add List Rule" and then select one or more mailing lists. Simply check the box next to the lists(s) you'd like to segment and then click the "Done" button. You will then see the list selector page collapse and the segmentation filters will appear.



With the provided filters, use any of the standard or custom fields in your lists to build your segment. After you've selected your field, you can then choose an operation (i.e. contains, equals, starts with, etc.) that will enable you to fine-tune your results. Lastly, input your specific search criteria into an empty text box and you're ready to go.

Now it's time to add another rule so click "Add Campaign Rule" and then select one or more campaigns lists. Simply check the box next to the campaigns(s) you'd like to segment and then click the "Done" button. You will then see the campaign selector page collapse and the segmentation filters will appear.

Creating a new Advanced Segment - List Members & Campaign Recipients

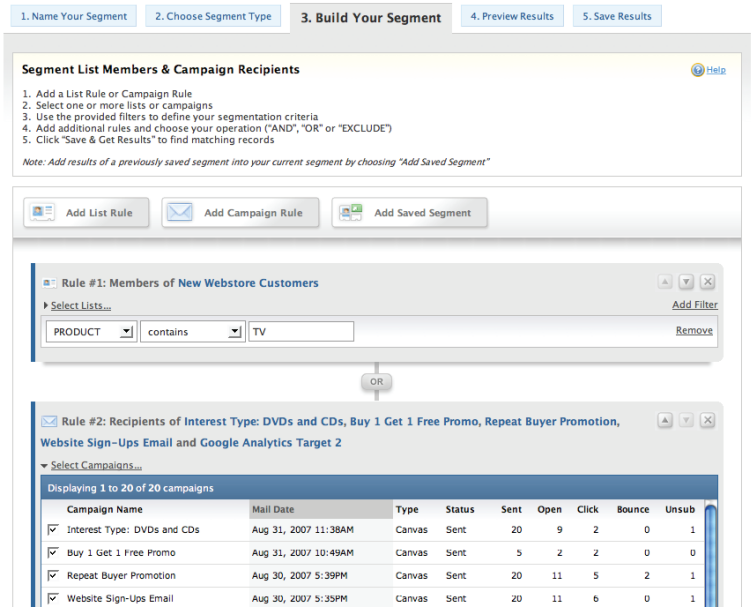
Now you'll see the two rules you've created joined by an operation, in this case "OR." You can click this icon to toggle between operations as a way of expanding or restricting your segment results.

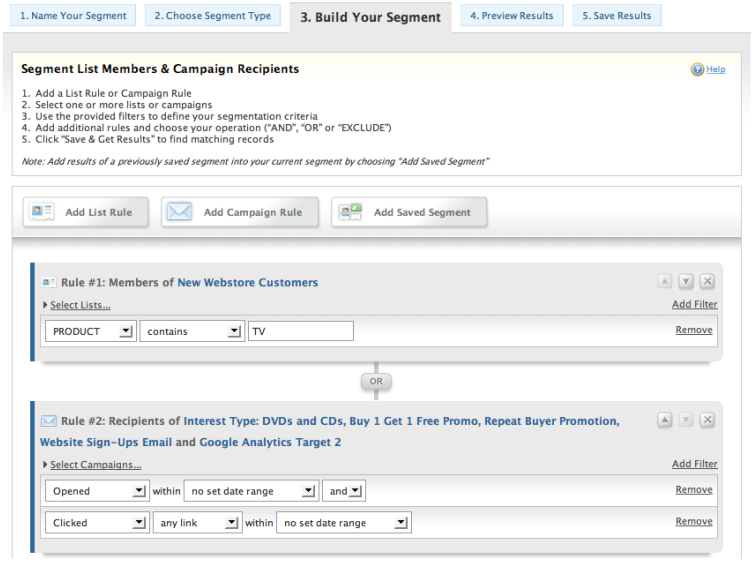
In the example below, we are building a segment that will join the results of the 2 rules we defined:

Rule 1: People on the "New Webstore Customers" List who have bought a TV-related product

Rule 2: People who have Opened & Clicked on the series of selected campaigns.

The final results will produce records that satisfy either the List Rule or the Campaign Rule. Once you've finished defining your segmentation criteria, click the Save & Get Results button to proceed. Note: By clicking the "Add Saved Segment" icon you can also include a previously saved segment as a rule in the current segment you are building.





Creating a new Advanced Segment - List Members & Campaign Recipients

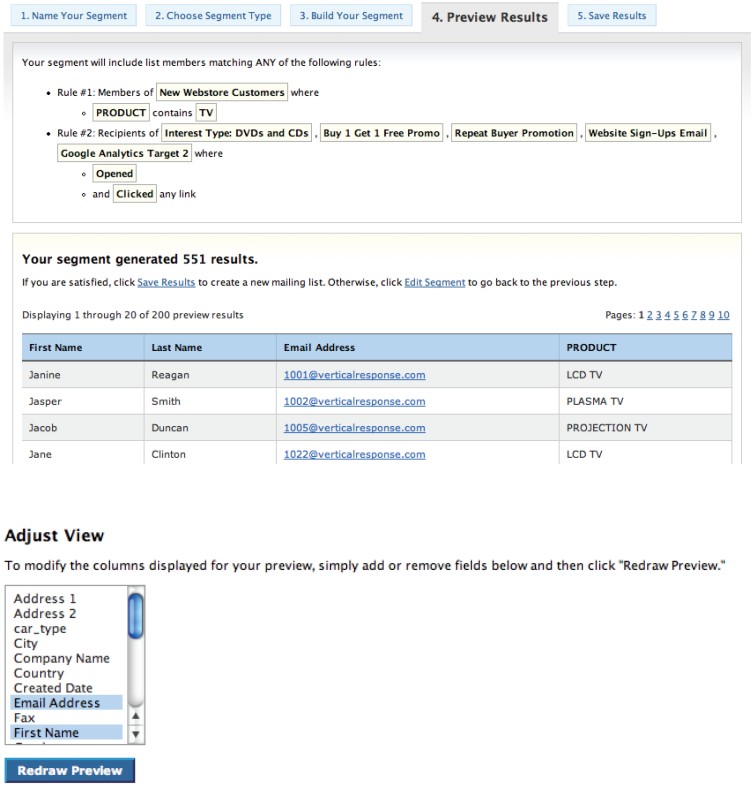
Preview Results:

On this step you'll be able to see a snapshot of your segment results and it's helpful to use this as a checkpoint during the segment building process.

Carefully review your results and then decide if you'd like to go back and modify your segmentation criteria (expand or restrict the results) or move forward and save the data as a new mailing list.

In addition, the default preview will display columns for First Name, Last Name, Email Address and any standard or custom fields that were used in your segmentation criteria (i.e. PRODUCT).

If you'd like to add/remove columns to customize your preview, simply use the Adjust View tool. Select the fields you wish to see and then click Redraw Preview. Once you are ready to proceed and save your segment, click the "Save Results" link or button to move on to the next step.



Creating a new Advanced Segment - List Members & Campaign Recipients

Save Results:

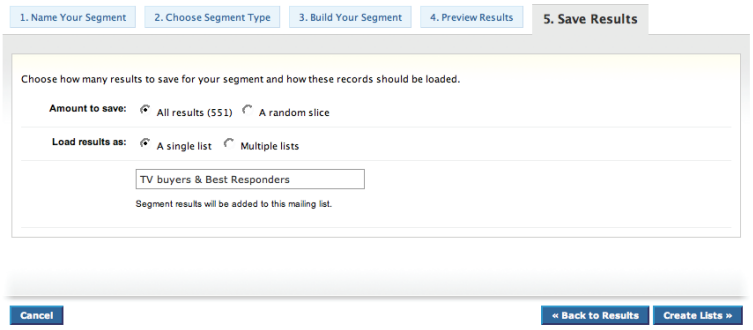
There are a variety of options for saving your segment results. You can choose the amount of results to save as well as how this data should be loaded as a new list(s).

In addition, the segment you defined will also be saved for future use or reference and it can be found in the Saved Segments area of your account.

Let's cover all of the segment saving options below:

1. Save All Results – As a Single List

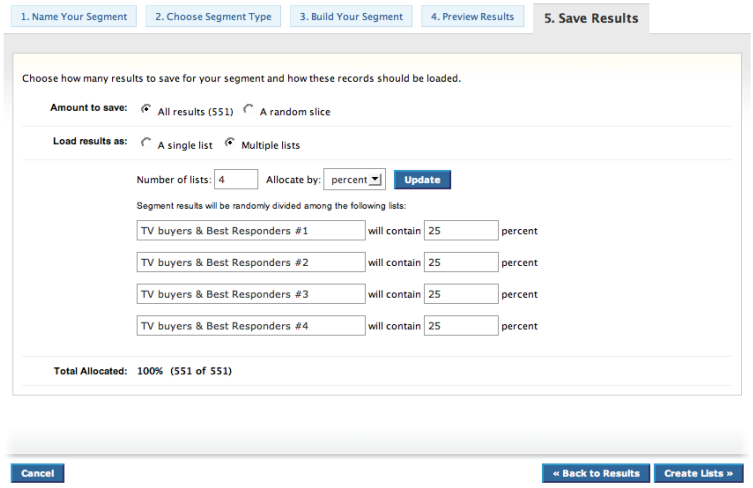
Choose this option if you want to create a new mailing list that contains all of the records returned for your segment. Click the "Create Lists" button and a single mailing list will be loaded in the Mailing List Management section of your account.



2. Save All Results – As Multiple Lists

Choose this option if you want all of the records returned for your segment divided into a specific number of randomized lists. The default will be set to 2 lists (i.e. A/B split) but you can increase the number by entering a new value in the text box and clicking the Update button.

In addition, you can also toggle the allocation view for your lists to show either percentages or record counts. For example, a segment of 100,000 records could be split into 4 randomized lists and displayed as:



25% + 25% + 25% + 25% = 100% Or 25,000 + 25,000 + 25,000 + 25,000 = 100,000.

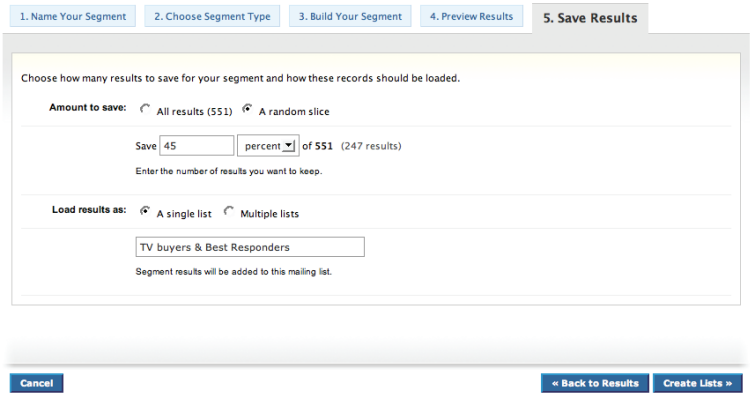
Click the "Create Lists" button and the data will then be loaded as multiple lists in the Mailing List Management section of your account.

Creating a new Advanced Segment - List Members & Campaign Recipients

3. Save a Random Slice – As a Single List

Choose this option if you'd like to save only some of the records from your segment results and have this data loaded as a single mailing list.

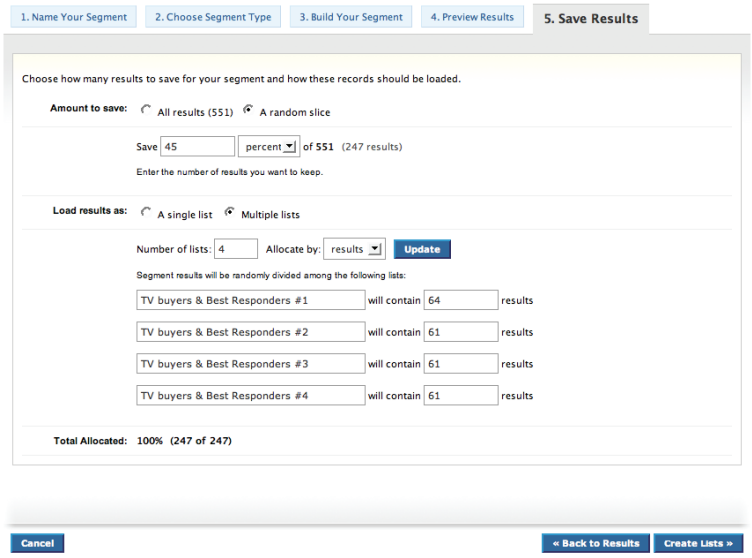
You can enter a percentage (i.e. 10% or 35%) or an exact record count (i.e. 15,000 or 45,500). Click the "Create Lists" button and a single mailing list will be loaded in the Mailing List Management section of your account.



4. Save a Random Slice – As a Multiple Lists

Choose this option if you'd like to save only some of the records from your segment results and have this data loaded as multiple mailing lists. You can enter a percentage (i.e. 10% or 35%) or an exact record count (i.e. 15,000 or 45,500) and this data will then be allocated into 2 or more lists.

The default will be set to 2 lists (i.e. A/B split) but you can increase the number by entering a new value in the text box and clicking the Update button.



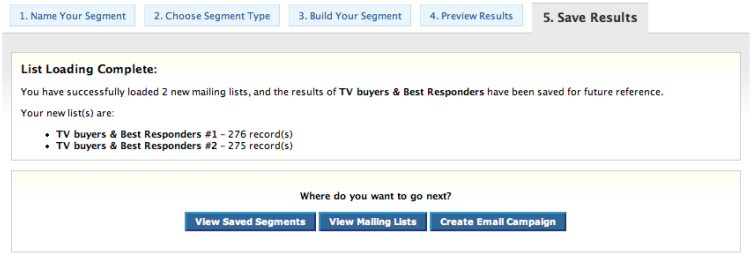
In addition, you can also toggle the allocation view for your lists to show either percentages or record counts. For example, a segment of 100,000 records could be split into 4 randomized lists and displayed as:

25% + 25% + 25% + 25% = 100% Or 25,000 + 25,000 + 25,000 + 25,000 = 100,000.

Click the "Create Lists" button and the data will then be loaded as multiple lists in the Mailing List Management section of your account.

Creating a new Advanced Segment - List Members & Campaign Recipients

Post-Save Options:



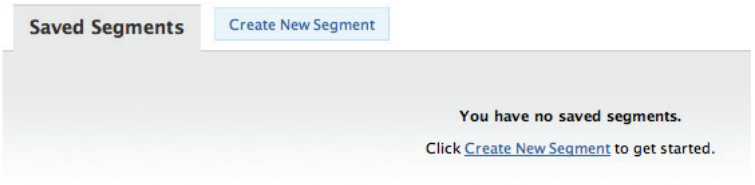
After you've loaded your mailing list(s) you will see a summary page which notes the number of mailing lists that were loaded and provides some informational text regarding your newly saved segment.

At this point you'll have the option to go back to the Saved Segments page, view your existing Mailing Lists or begin the creation of a New Email Campaign. Simply click the button that meets your needs.

Mass Merging List Members

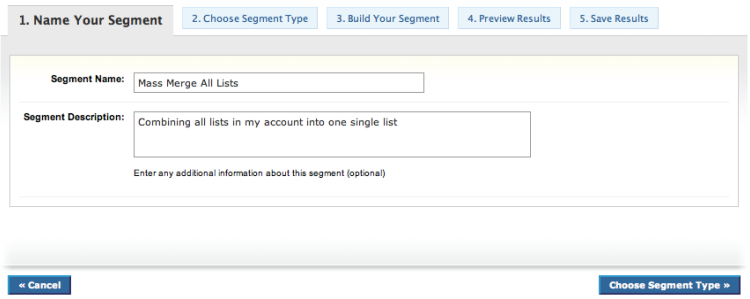
Getting Started:

To begin, click on the Segment option within your List section. You will see the Saved Segments box, which will be empty, so go ahead and click “Create New Segment” to get started.



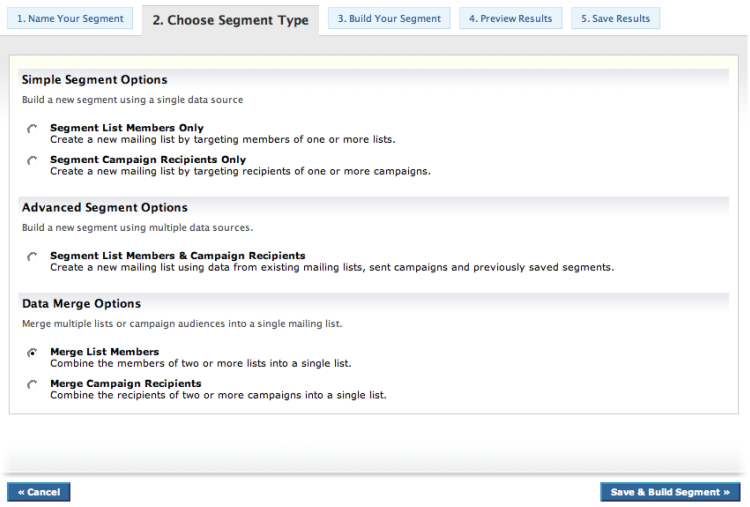
Name Your Segment:

On this step you will give your segment a name (required) as well as description (optional). The description field is useful as you’ll be able to add additional information that explains the rationale or business rules behind the segment if you need to reference this in the future.



Choose Segment Type:

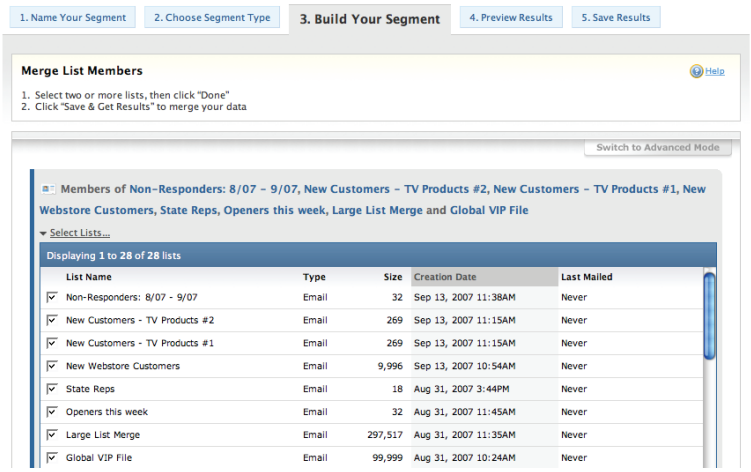
On this step you’ll be presented with a few options, some for simple or advanced segmentation and some for data merging. For this example we’ll choose one of the Data Merge Options, specifically **Merge List Members**.



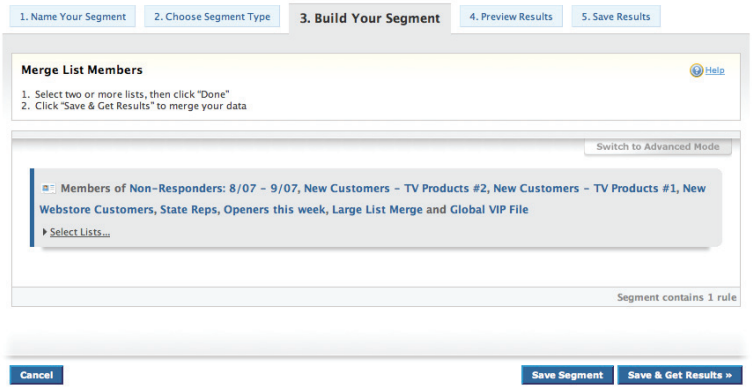
Mass Merging List Members

Build Your Segment:

Now it's time to begin the data merging process and the first step is to select two or more mailing lists. Simply check the box next to the lists you'd like to merge and then click the "Done" button. You will then see the list selector page collapse.



Since you are merging your data and not segmenting, you can simply click "Save & Get Results" to proceed.



Mass Merging List Members

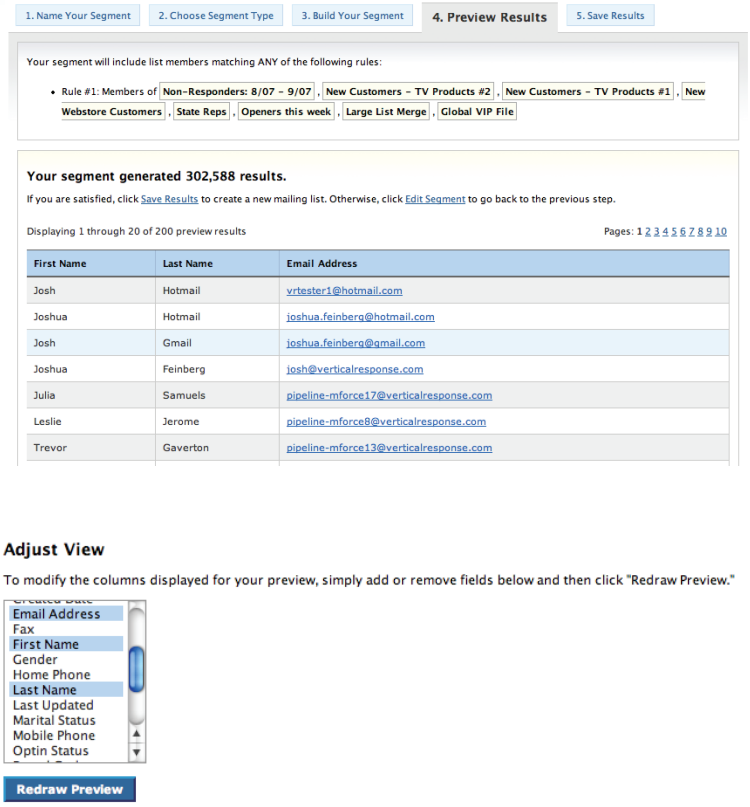
Preview Results:

On this step you'll be able to see a snapshot of your data merge results and it's helpful to use this as a checkpoint during the list building process.

Carefully review your results and then decide if you'd like to go back and modify your merge criteria (add/remove lists) or move forward and save the data as a new mailing list.

In addition, the default preview will display columns for First Name, Last Name and Email Address. If you'd like to add/remove columns to customize your preview, simply use the Adjust View tool. Select the fields you wish to see and then click Redraw Preview.

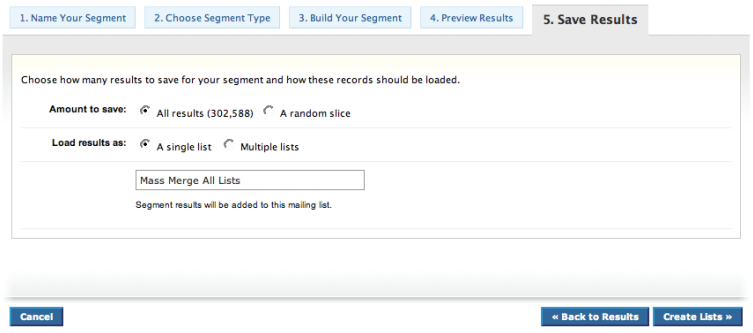
Once you are ready to proceed and save your segment, click the "Save Results" link or button to move on to the next step.

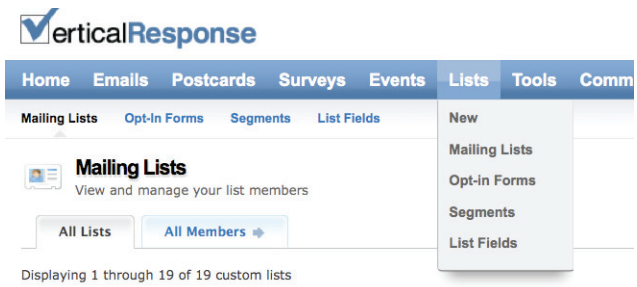


Save Results:

There are a variety of options for saving your merge results. You can choose the amount of results to save as well as how this data should be loaded as a new list(s).

Since you chose this option to consolidate multiple lists, you'll most likely want to choose the default selection, which is to load the results as a single mailing list. Click the "Create Lists" button and a single mailing list will be loaded in the Mailing List Management section of your account.





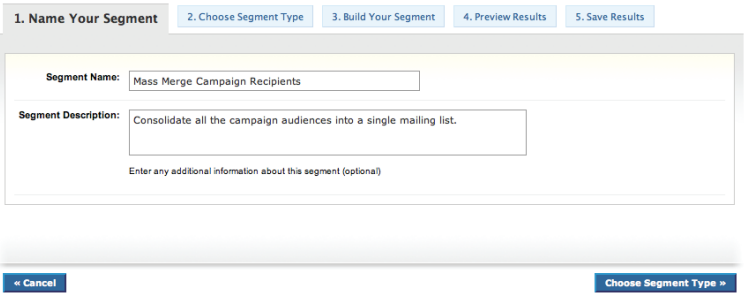
Mass Merging Campaign Recipients

Getting Started:

To begin, click on the Segment Your Lists tab within your Control Center. You will see the Saved Segments tab, which will be empty, so go ahead and click “Create New Segment” to get started.

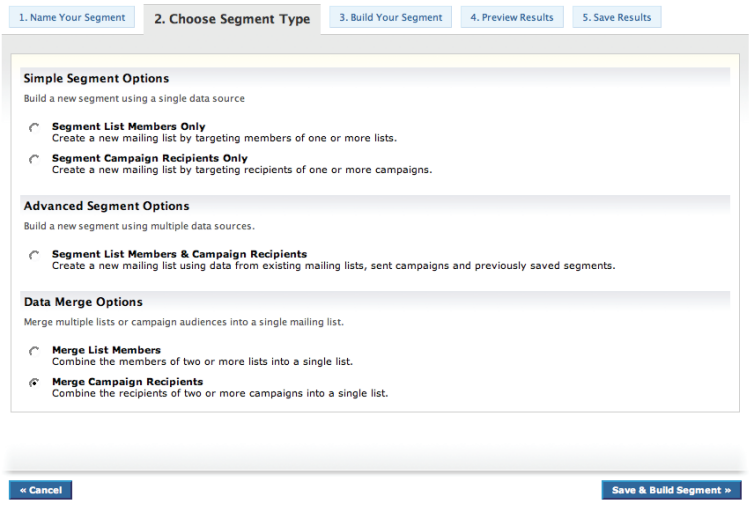
Name Your Segment:

On this step you will give your segment a name (required) as well as description (optional). The description field is useful as you’ll be able to add additional information that explains the rationale or business rules behind the segment if you need to reference this in the future.



Choose Segment Type:

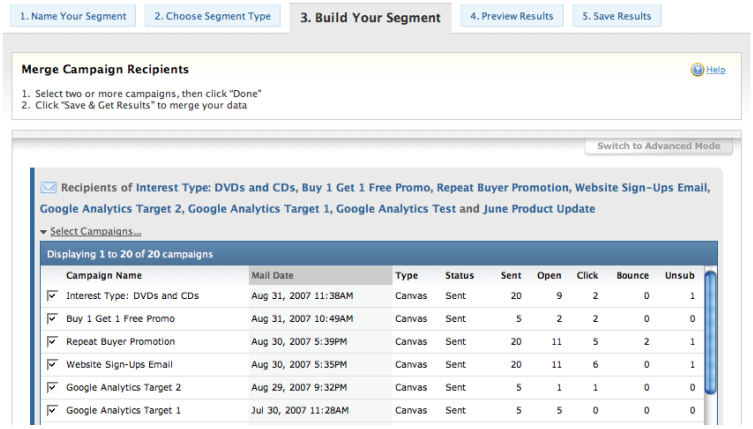
On this step you’ll be presented with a few options, some for simple or advanced segmentation and some for data merging. For this example we’ll choose one of the Data Merge Options, specifically **Merge Campaign Recipients**.



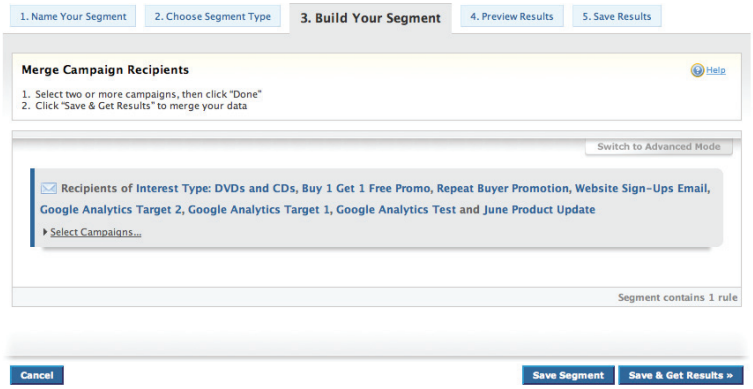
Mass Merging Campaign Recipients

Build Your Segment:

Now it's time to begin the data merging process and the first step is to select two or more email campaigns. Simply check the box next to the campaigns you'd like to merge and then click the "Done" button. You will then see the campaign selector page collapse.



Since you are merging your data and not segmenting, you can simply click "Save & Get Results" to proceed.



Mass Merging Campaign Recipients

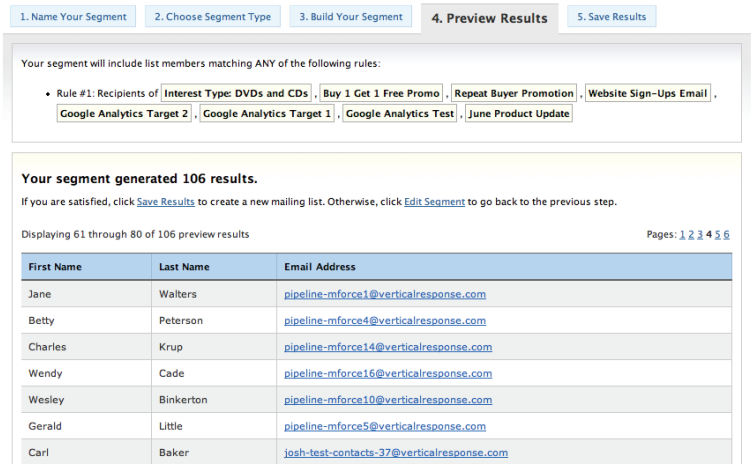
Preview Results:

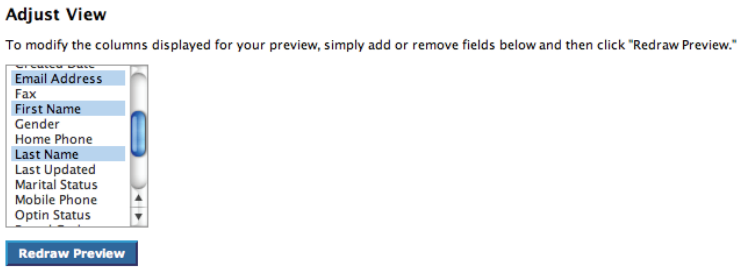
On this step you'll be able to see a snapshot of your data merge results and it's helpful to use this as a checkpoint during the list building process.

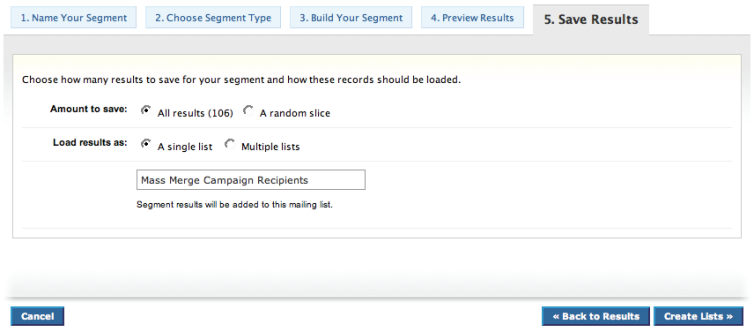
Carefully review your results and then decide if you'd like to go back and modify your merge criteria (add/remove campaigns) or move forward and save the data as a new mailing list.

In addition, the default preview will display columns for First Name, Last Name and Email Address. If you'd like to add/remove columns to customize your preview, simply use the Adjust View tool. Select the fields you wish to see and then click Redraw Preview.

Once you are ready to proceed and save your segment, click the "Save Results" link or button to move on to the next step.



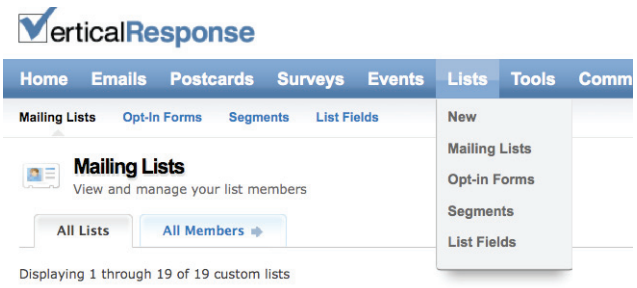




Save Results:

There are a variety of options for saving your merge results. You can choose the amount of results to save as well as how this data should be loaded as a new list(s).

Since you chose this option to consolidate multiple campaign audiences, you'll mostly likely want to choose the default selection, which is to load the results as a single mailing list. Click the "Create Lists" button and a single mailing list will be loaded in the Mailing List Management section of your account.



List Segmentation FAQs & Glossary

What is a List Rule?

A list rule allows you to construct a new segment using the standard and custom fields found within your existing mailing lists. You can select one list or multiple lists to define your search criteria and then find matching results.

When would I use a List Rule?

You'll want to use a list rule if you trying to find records that have a specific "field value." For example, to find people who bought a specific product and who live in California, New York and Texas you could construct a segment that focuses on a custom field called "PRODUCT" and the standard field of "STATE."

What are some examples of List Rules?

Great question, and this all depends on the data within your uploaded mailing lists. We'll provide some generic examples and hopefully this will generate some ideas for the types of list rules you'd want to build.

Ex. 1 Using standard fields

Find all records on List A, List B and List C where "State" equals California, New York, Texas

Ex. 2 Using custom fields

Find all records on List B and List D where "Product_Category" contains software, hardware, peripherals

Ex. 3 Using standard & custom fields

Find all records on List C, List D and List G where "Title" contains VP and "Purchase_Amount" is greater than or equal to $100.00

What is a Campaign Rule?

A campaign rule allows you to reference data from your sent email campaigns to construct a new segment. When using a campaign rule you'll be able to access any of the standard and custom fields found on the list(s) you mailed to, as well as campaign response types such as "Opened", "Clicked", etc., to find records that match your search criteria.

List Segmentation FAQs & Glossary

When would I use a Campaign Rule?

You'll want to use a campaign rule when you are looking to isolate responders and non-responders for the campaigns you've sent. These segments can be based on specific campaign response types or date ranges for when the action was taken.

For example, you could use a campaign rule to find recipients who opened your email and clicked a link during the past 14 days and then build a new mailing list from these results.

What are some examples of Campaign Rules?

Great question and this all depends on the data that you have within your uploaded mailing lists and the response types you're looking to target. We'll give some generic examples and hopefully this will generate some ideas for the types of campaign rules you'd want to build.

Ex. 1 Using Response Types
Find all records on Campaign A, Campaign B and Campaign C who "Clicked" between June 1st, 2007 and June 15th, 2007.

Ex. 2 Using Response Types and Standard fields
Find all records on Campaign B and Campaign D who "Did not open" and whose "email address" contains aol.com, msn.com and yahoo.com

Ex. 3 Using Response Types, Standard fields and Custom fields
Find all records on Campaign C, Campaign D and Campaign G who "Opened" and who "Did not click" and whose "Company" equals Acme, Inc and "Product Interest" contains "autos, computers, travel"

What is a Saved Segment?

A saved segment is comprised of the parameters that you previously defined using list and/or campaign rules. When creating new segments, you can include a previously saved segment when defining your search criteria.

List Segmentation FAQs & Glossary

When would I use a Saved Segment?

Using saved segments is great time-saver as you can add fully constructed rules into your new query without taking the time to build them from scratch. Generating a bank of commonly used segments is a great way to speed up the process of segment building as it will get you to your desired result set much faster.

What are some examples of Saved Segments?

That's for you to decide! Since every user has different business needs, the types of saved segments will vary. Just know that each time you create a new segment using list and campaign rules it will automatically be saved into the "Saved Segments" section of the your account. Create as many as you like for easy and efficient segment creation in the future.

What is the "AND" operation?

The "AND" operation will return results that satisfy all of the defined rules within your segment. This operation tends to produce a smaller result set since it's more restrictive.

What is the "OR" operation?

The "OR" operation will return results that satisfy any of the defined rules within your segment. This operation tends to produce a larger result set since it's less restrictive.

What is the "EXCLUDE" operation?

The "EXCLUDE" operation requires exactly two rules to be constructed. It will take the results of Rule 2 subtract them from the results of Rule 1 to produce your final target audience. This operation is very useful for suppressing campaign recipients or lists members to make sure they are not added to the new mailing list.

What is "Merge List Members?"

This tool enables you to quickly and easily create a new mailing list by combining the records found on two or more existing lists. Simply select any of your saved mailing lists and a new list will be created containing the sum of all records found on the selected lists, minus duplicates.

List Segmentation FAQs & Glossary

When would I merge List Members?

You would choose this option if you're looking to consolidate multiple lists into a master file for a variety of space-saving and time-saving reasons.

What is "Merge Campaign Recipients?"

This tool enables you to quickly and easily create a new mailing list by combining the records found on two or more sent campaigns. Simply select any of your previously sent campaigns and a new list will be created containing the sum of all records found on the lists you mailed to, minus duplicates.