

Worksheet: Planning and Creating A New Segmentation in the Marketo Database

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Segmentations are built in the Marketo Database and allow you to group people into different profiles. This helps you provide a more personalized touch for your users through dynamic content or snippets by displaying different information based on the values specified in building your Segmentation. This exercise will help you plan out how to think about your segmentations.

EXERCISE 1A - BUILDING A SEGMENTATION

(Examples: Language, Region, Job Title, Industry, etc.)

1. Identify 3 variables on your lead records that could be used for creating a Segmentation in your instance for more personalized marketing.

Examples: Language, Region, Job Title, Industry, Product of Interest, etc.

2. Choose one of the above variables and identify the Segments you would assign them to. You want to break leads up based on factors that will affect personalization.

Example:

SEGMENTATION NAME: *Region*

SEGMENT 1: *EMEA*

SEGMENT 2: *APAC*

SEGMENT 3: *ANZ*

SEGMENT 4: *NA*

SEGMENT 5: *SA*

3. Select one of the above segments, and identify the parameters you would need in your Smart List to define the users in the segment:

Example:

SEGMENT: *ANZ*

Smart List:

Country is:

Australia

New Zealand

NOW TRY IT IN MARKETO!

- To build your Segmentation, head to the Marketo Database.
- Right-click on the Segmentations folder to Create a New Segmentation
- Name your Segmentation and add the segments you would like to have included (Step 2 above)
 - Note: There will always be a Default option for people who do not meet the criteria of your defined Smart Lists for each Segment.
- Once you have created the Segmentation, define the Smart List for each of your Segments (Step 3 above).
- After all Segments have been completed, approve your Segmentation to enable it for use.