Contact management

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What information do you need to set up segments?

To create segments in your email marketing tool or CRM system, you need data about your contacts: their characteristics (contact fields and interests) and preferences regarding the content of your emails. Note why you want to segment and what contact data you need to do so.

Example of the necessary contact data for a clothing brand:

I want to address my customers in their own language.

Contact field: Language

I want to address my customers personally

Contact field: First name

I want to let male customers know that we also sell menswear.

Contact field: Gender

I want to send my customers an email with a discount code on their birthday.

Contact field: Date of birth

I have promotions targeted by region and want to share them with customers who live in these regions.

Contact field: Postal code

I would like to congratulate customers of 5 years with a discount code.

Contact field: Date of customer registration

I want to respond to my customers' interests regarding my products and/or services.

Interests: Sportswear, Lingerie, Accessories, Spring collection fashion show

I want to send emails with content that my customers would like to receive.

Preference(s): Promotions, New products, Special collections, Events (fashion shows)

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Write down which contact fields, interests and preferences you need in order to create relevant segments:

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Contact field: ....

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Contact field: ....

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Contact field: ....

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Contact field: ....

I want to respond to my customers' interests regarding my products and/or services.

Interest(s): ....
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I want to send emails with content that my customers would like to receive.

Preference(s): ....
....

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Would you like to list the most important contact fields, interests and preferences for your company in an email marketing tool? Create a demo account on flexmail.be now. Find out how to create contact fields in Flexmail and complete your profile with the necessary contact fields using the instructions above. See what a completed profile looks like in Flexmail.

Collecting information about your contacts

During or after collecting your contacts, you also want to gather relevant information about them. You can always ask your contacts for extra data in your opt-in form or afterwards in a survey.

> **Tip:** Download our checklist for an opt-in form that works. We love helping you succeed!

Thanks to the previous assignment, you know exactly what contact data you need. Ask your contacts what they want to share so you can effectively use the data to segment. For this purpose, we prepared some useful questions to get you started. Answers to these questions will then provide additional information so that you can anticipate the needs and desires of your contacts and set up relevant segments.

What questions do you need to collect the necessary contact data? Supplement the table with questions that are relevant to your company. Distinguish between the characteristics of your contacts, their interests and preferences, and what stage of the purchasing process they are in.

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Features	Interests	Preferences	Customer journey stage
What is your postal code?	Would you like to know more about: - Product X - Product Y - Product Z	Would you like to be kept informed about the latest news concerning our products?	How was your experience with product X?
What is your gender?	Would you like to get more background information on product X?	Which product and/or service attracts you the most?	How can we do more for you?
What is your date of birth?	Do you like to keep up with the latest trends?	Would you like to receive emails about milestones related to our brand?	What stops you from buying product X?
What sector do you work in?	Would you like to learn how to use product x differently?	Would you like to be notified when product X is on sale?	How satisfied are you with our service? Please indicate what could be better.

Creating segments based on personas

For this assignment, use the personas you designed in [Worksheet Module 1](). Determine per persona what information is important and how you can segment.

A simple way to represent and set up your segments visually, is by using a **Venn diagram** to collect the characteristics, preferences and/or interactions on which you want to segment. Where the given criteria overlap, your segment's relevance emerges.

Tip: The more criteria, the more personal and specific you segment.

Features: Information about your contacts such as gender, location, date of birth, registration date, interests... (contact fields from the first task).

Preferences about message content: What type of emails do they want to receive and what topics do they prefer?

Interactions with your company and/or email communication: What is their click behaviour? What campaigns are they opening? What content are they downloading? Are they active or not? Is there a product or service they regularly show interest in?

Persona 1: ………………………………………

Features: ……… .
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Preferences about message content: …………………………………………………………………………………
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Interactions with your company and/or email communication: …………………………………………………
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Persona 2: …………………………………………

Features: ……… .
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Preferences about message content: ………
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Interactions with your company and/or email communication: ……………………………………………………………
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Persona 3: …………………………………………

Features: ……… .
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Preferences about message content: ………
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Interactions with your company and/or email communication: ……………………………………………………………
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Persona 4: ……………………………………

Features: …… .
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Preferences about message content: ………………………………………………………………………………………………
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Interactions with your company and/or email communication: ……………………………………………………
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Persona 5: ……………………………………

Features: …… .
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Preferences about message content: ………………………………………………………………………………………………
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Interactions with your company and/or email communication: ……………………………………………………
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Fill in the Venn diagrams with the aforementioned information and create segments yourself. Give each segment a relevant name that you can use afterwards in your email marketing tool or CRM system.
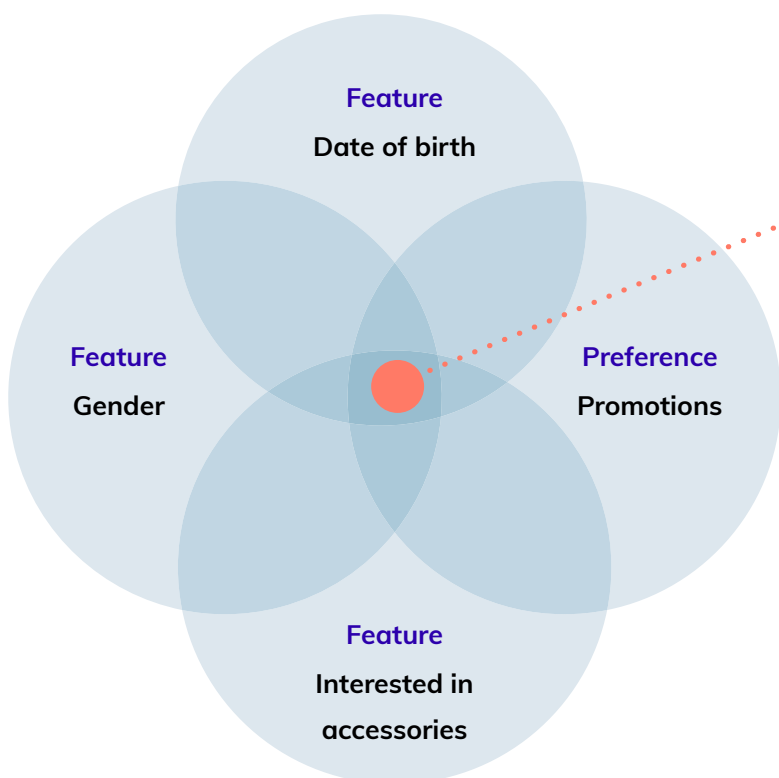
Some examples:

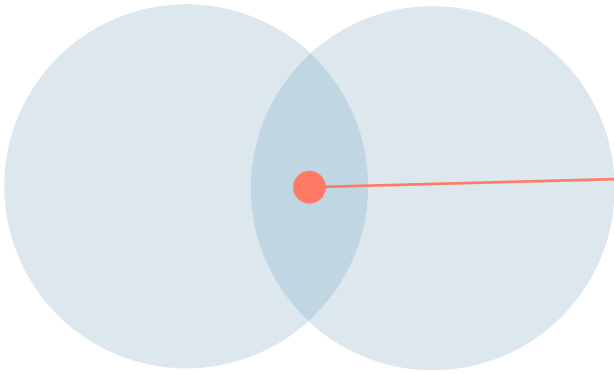**Feature**
Postal code

Preference
Promotions

Segment: Promotion region X

With this segment, I can send customers in region X an email with the available promotions valid in that region.

Feature
Date of birth

Feature
Gender

Preference
Promotions

Feature
Interested in accessories

Segment: Birthday gift accessories

With this segment, I can send female customers interested in accessories a discount code on their birthday, valid on a selection of accessories.

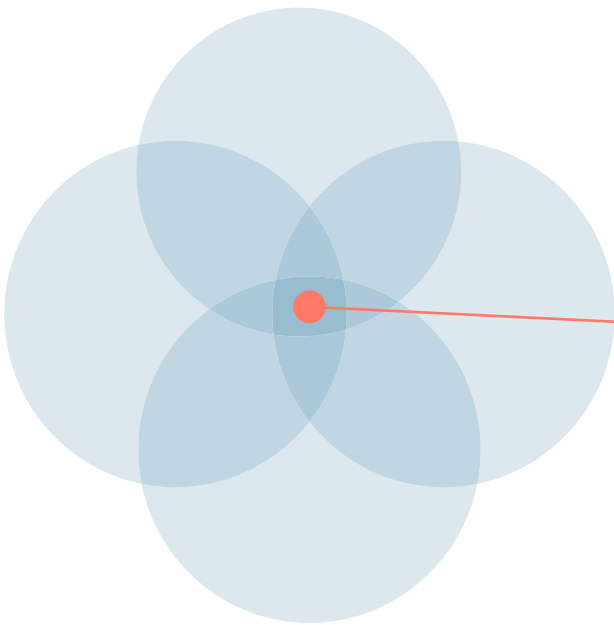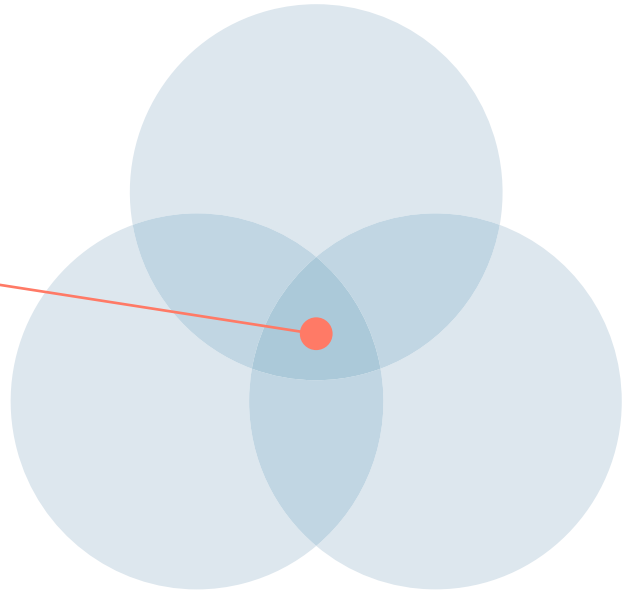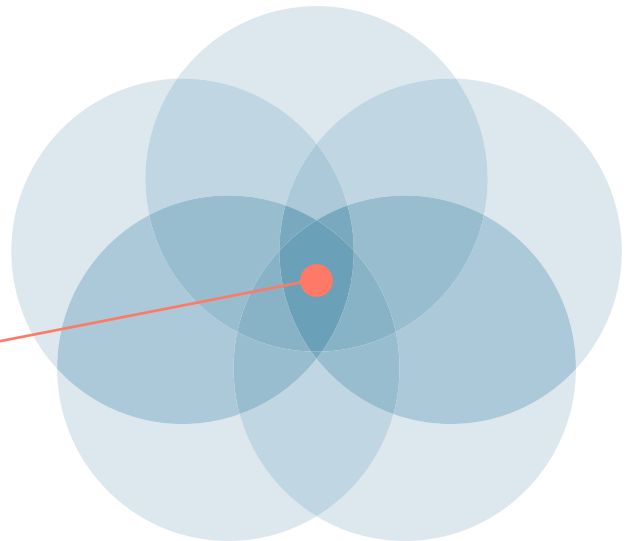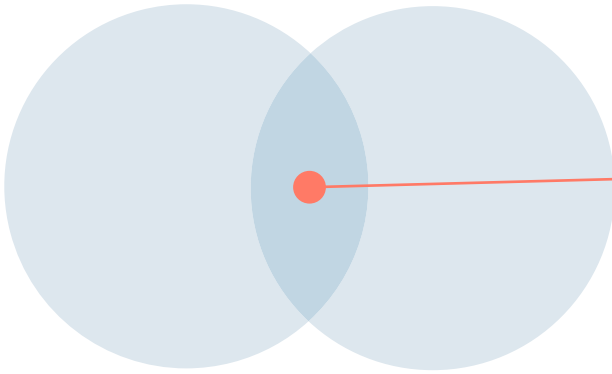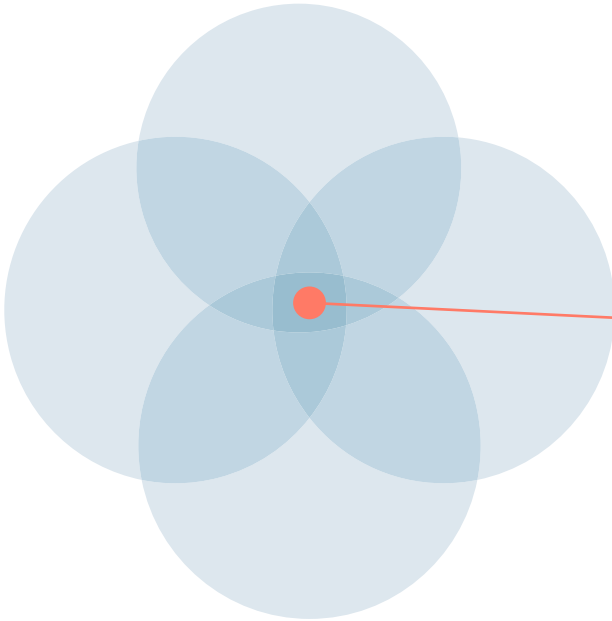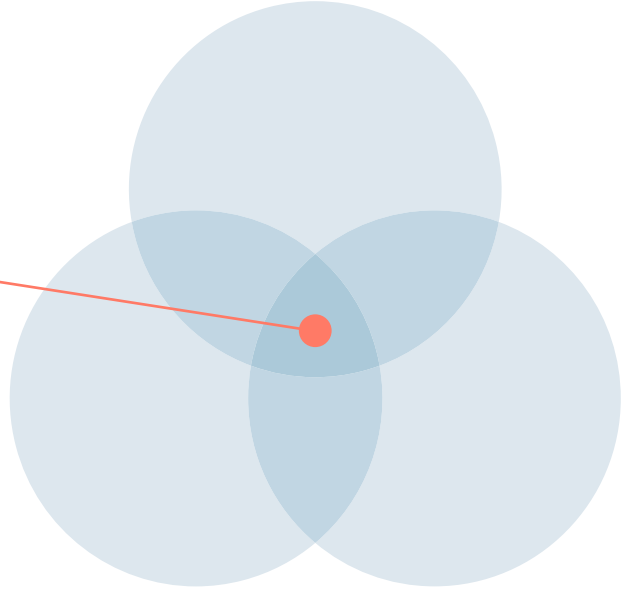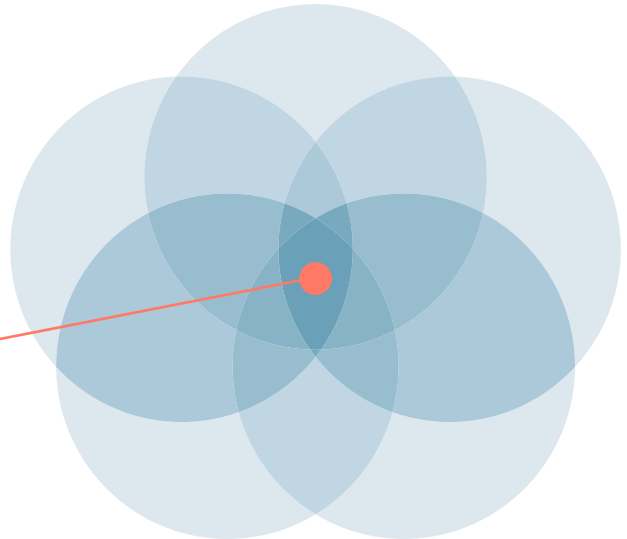**Flexmail**

Segment: ....
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