

act-on

WEBINAR

ASK
ACT-ON
ABOUT...

SEGMENTATION & SCORING

JUNE 11, 2018

9AM-10AM PT



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Marketing Operations
Strategist

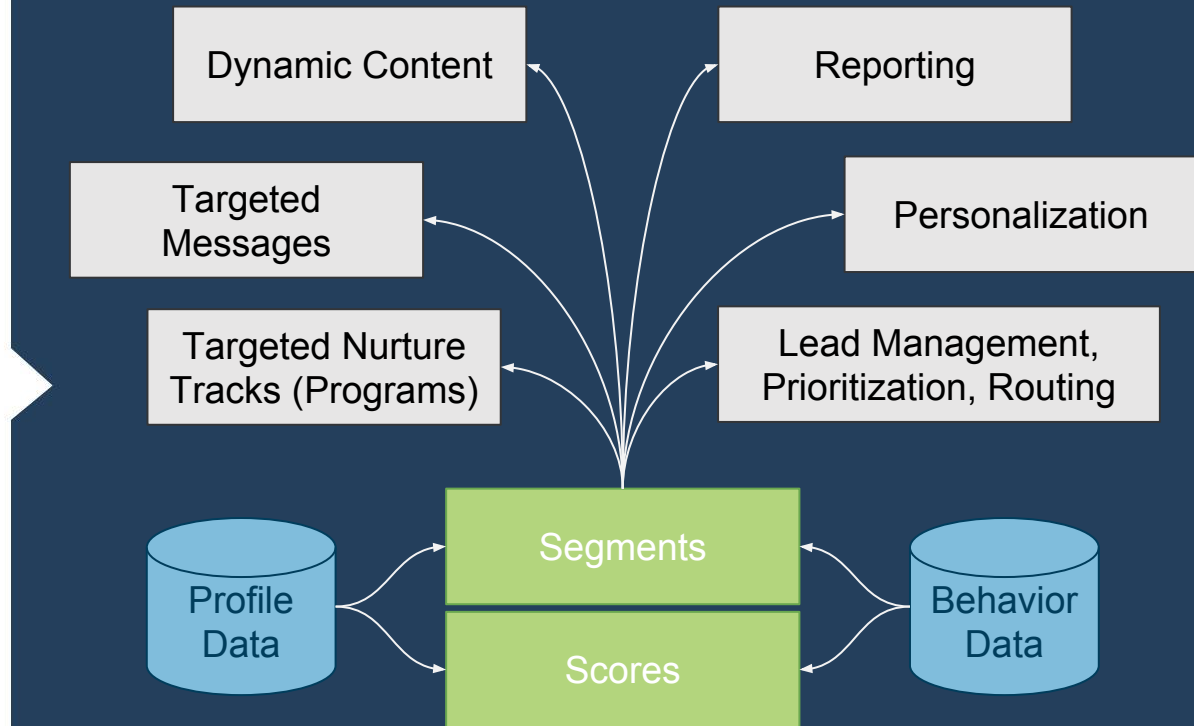


Max Spector
Sr. Product Manager

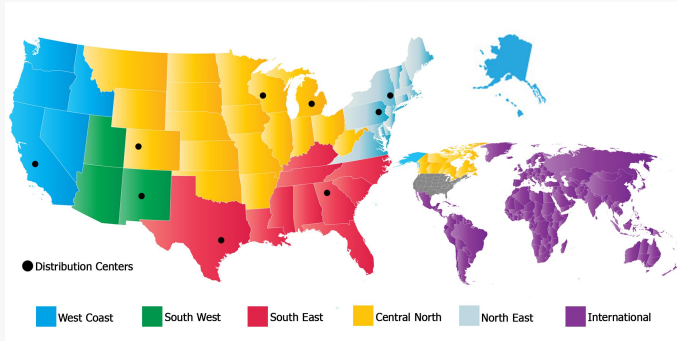
Today's Agenda

- Segmentation and Scoring's place in Marketing Automation
- Segmentation and Scoring best practices
- Recent updates
- Q&A

**Segmentation is
the bedrock of
successful
marketing
campaigns**



Segments and Scores feed your Marketing Engine



- Create micro-segments for direct marketing messages and digital content
- Route leads to the appropriate team member, content, or web-property

- Score leads for follow-up prioritization
- Determine level of interest and intent to match with appropriate messages
- Develop buyer fit and engagement scores for a complete understanding of lead quality and timing

		Acts like a buyer Account-Based Behavior Score			
		1	2	3	4
Looks like a buyer Account-Based Fit Score	A	8.2x	4.0x	1.7x	1.2x
	B	3.0x	1.9x	0.8x	0.2x
	C	2.1x	0.8x	0.5x	0x
	D	1.3x	0.4x	0.1x	0x

Pair Segments with Programs and Content

- Customer Satisfaction campaign:
 - Target promoters for public review solicitation
 - Target detractors for issue resolution
- Product/Service-specific campaigns
 - Target customers based on their specific past purchases
 - Communicate updates or market related products/services
- Upcoming renewal campaigns
 - Target customers with an upcoming renewal based on contract date

Developing your scoring strategy

How well does this person fit my understanding of an ideal Lead?

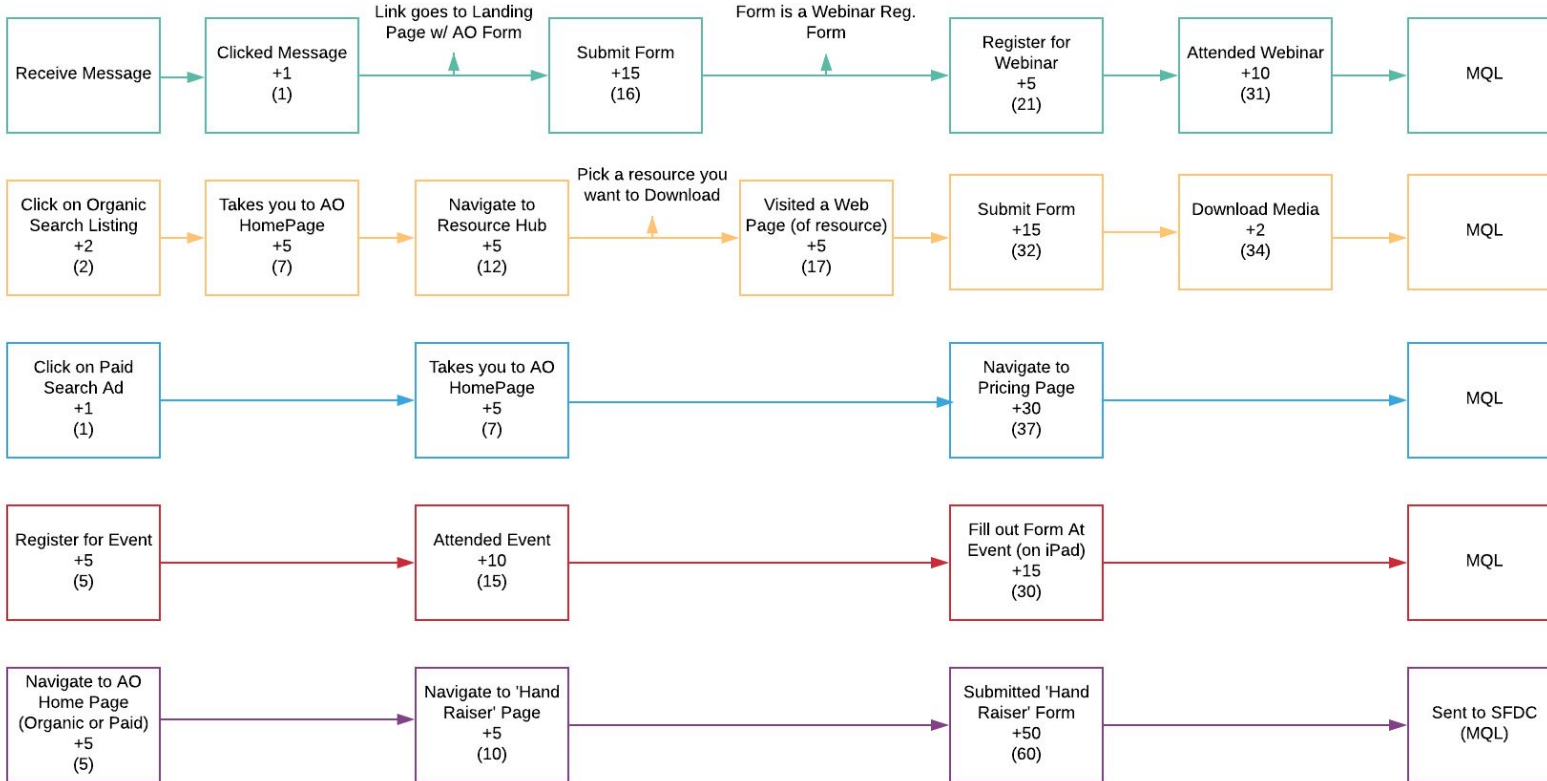
- How similar are the contacts who convert?
- Which behaviors indicate intent?
- Does an ideal Lead look different from one product/business line to another?
- How can static scoring rules remain flexible for human behavior?



Setting Up Scoring Rules in Act-On



What does scoring do for you?



Different Types of Scoring Rules

Act-On supports Four Scoring Types

1. **Profile**
2. **General Activity**
3. **Custom Activity**
4. **Specific Activity**

Each of these are treated and used differently within the platform.

The Score Sheet(s)

Default Score Sheet Save Cancel

Profile Score

VP+ title	<input type="text" value="4"/>
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+

Activity in the last 90 days Score

Was sent a message	<input type="text" value="0"/>
Opened a message	<input type="text" value="0"/>
Clicked on a message	<input type="text" value="1"/>
Viewed a form	<input type="text" value="0"/>
Submitted a form	<input type="text" value="15"/>
Downloaded media	<input type="text" value="2"/>
Visited a landing page	<input type="text" value="0"/>

Score Sheet

- Profile (top section)
- Activity (bottom section)
- Score Value
- Multiple Score Sheets

Profile Scoring

★ Profile Condition

Enter a short description

Contact Field

Condition

Criteria

Profile Scores

- Contact Field - Standard Field Names
- Condition/ Criteria

Important note!!!

- Profile scores are list-specific!

Behavior/Activity Scoring

Activity	Score
Was sent a message	0
Opened a message	0
Clicked on a message	1
Viewed a form	0
Submitted a form	15
Downloaded media	2
Visited a landing page	0
Visited a web page	5
Clicked a Social Post	0
Registered for a webinar	5
Attended a webinar	10
Clicked on an organic search listing	2
Clicked on a paid search ad	1
Entered a program	0

Activity Scores

- Activity Time Frame
- Behaviors
- Scores

Custom vs Specific Activity Scores

Custom Activity

- Custom Touch Points
- Blue

Registered for an event

Attended an event

Downloaded media

Vidyard

Event Handraiser

3rd Party Review

general behavior 3

Specific Activity

- Any Activity
- Multiple Scores for Activity "type"
- One-time usage (per record)

▼ Submitted these forms:

 Login Tracking



▶ Visited these web pages:

▶ Submitted these forms:

The Results - Act-On Behavioral Score

MAS
Act-On
Street Address
City, State, Zip

Email robert.kohnke@act-on.com
Mobile
Work
Home

- Overview
- Website
- Search
- Mailings
- Forms
- Webinars
- Media
- Programs
- Social
- Custom
- All
- Timeline

Forms

Views	0
Submits	10

Webinars

Registered	1
Attended	1

Media

Downloads	0
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Social Publish

Twitter Clicks	0
Facebook Clicks	0
Linkedin Clicks	0

Behavioral Score 15 for the last 90 days

Registered for webinars:	5 pts
Attended webinars:	10 pts

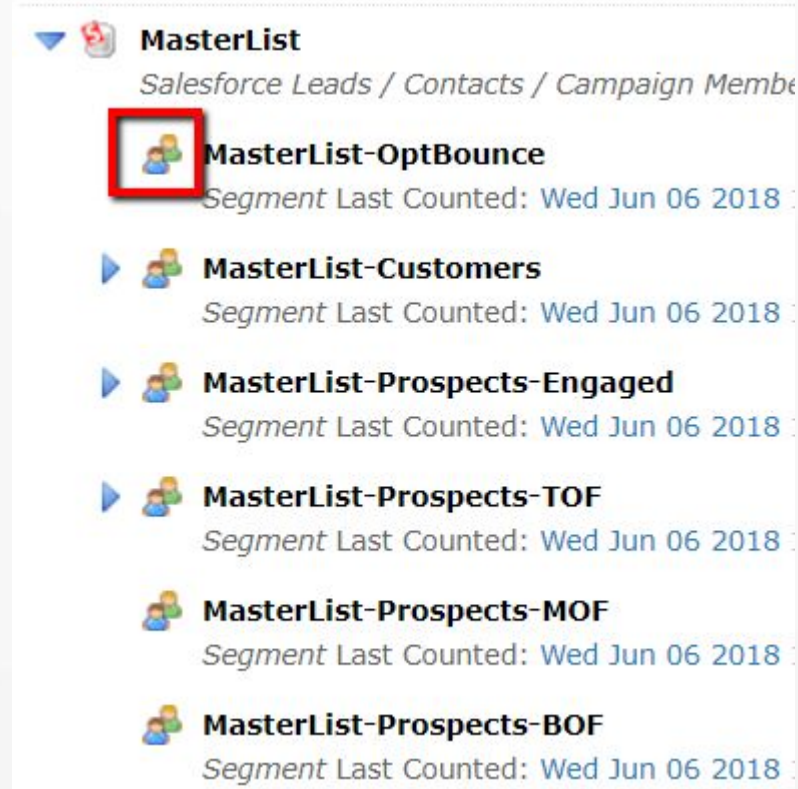


Segmentation - What, Why, and Examples

What is Segmentation (in Act-On)?

Segments are:

1. Views/Buckets of the Parent List
2. Query/Logic Driven
3. NOT lists unto themselves
4. Dynamic
5. Automatically updating
6. A MUST!



The screenshot displays a list of segments under the heading "MasterList". The segments are:

- MasterList-OptBounce** (highlighted with a red box): Segment Last Counted: Wed Jun 06 2018
- MasterList-Customers**: Segment Last Counted: Wed Jun 06 2018
- MasterList-Prospects-Engaged**: Segment Last Counted: Wed Jun 06 2018
- MasterList-Prospects-TOF**: Segment Last Counted: Wed Jun 06 2018
- MasterList-Prospects-MOF**: Segment Last Counted: Wed Jun 06 2018
- MasterList-Prospects-BOF**: Segment Last Counted: Wed Jun 06 2018

The breadcrumb path at the top reads: *Salesforce Leads / Contacts / Campaign Membe*

Act-On's Segment Builder

Manage Segment

Name

Method Query ▼

Search

Combine expressions with AND ▼

[Query Templates](#)



▼ First Name ▼

▼ contains ▼



Profile

Behavior

Score

CRM

Subscription

System

Example Segmentation

Manage Segment

Name

Method

Combine expressions with

contains



- Profile
- Behavior
- Score
- CRM
- Subscription
- System

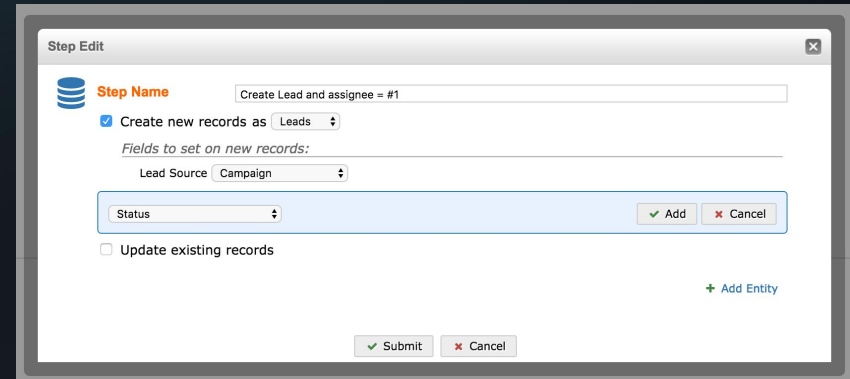
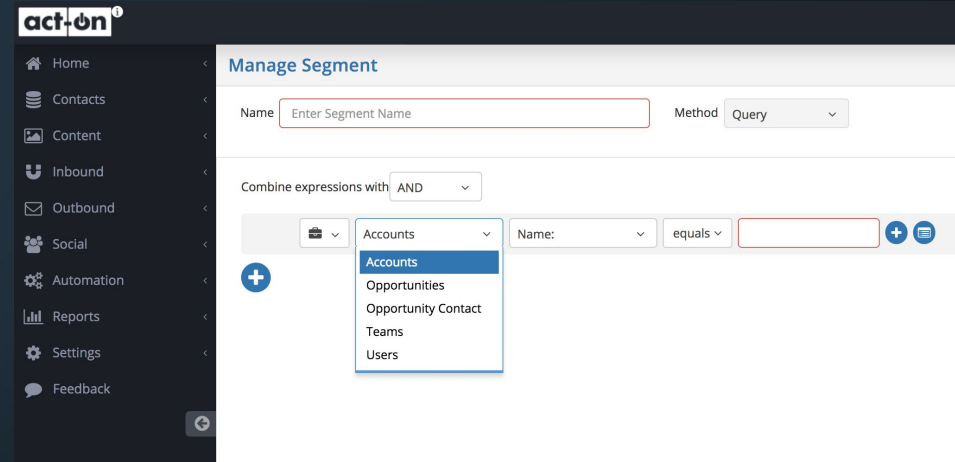
- List - Example Segmentation Architecture**
Uploaded List Created: Tue Dec 27 2016 6:52 AM
- Industry: Petroleum**
Segment Last Counted: Wed Dec 06 2017 9
- Role: Petro - Executive**
Segment Last Counted: Wed Dec 06 20
- Petro - TOF**
Segment Last Counted: Wed Dec 06 20
- Petro - MOF**
Segment Last Counted: Wed Dec 06 20
- Petro - BOF**
Segment Last Counted: Wed Dec 06 20
- Petro - MQL**
Segment Last Counted: Wed Dec 06 20
- Role: Petro - Safety/Training**
Segment Last Counted: Wed Dec 06 20
- Role: Petro - Manager**
Segment Last Counted: Wed Dec 06 20
- Industry: Construction**
Segment Last Counted: Wed Dec 06 2017 9

Recent Updates



CRM Entity Segmentation

- Any related entity data can be used for:
 - Lead/Contact Segmentation
 - 'Create in CRM' program steps
 - Personalization*
- Custom entities can be synced following a PSO engagement



- Where available: Salesforce and Sugar customers only

* - 1:1 entity relationships only

Where you can find help

Act-On University

<https://university.act-on.com/>

- Detailed guides to get you started
- On-demand training courses cover basic to advanced use cases

The screenshot displays the Act-On University interface. At the top, there's a navigation bar with the Act-On logo and a grid of partner logos including Microsoft Dynamics, Salesforce, HubSpot, NetSuite, and SAP. Below this, a dark-themed course card for '126: Manage Prospects with Segments' is visible, featuring a 'Start this course' button. A dark blue sidebar menu on the left contains links for Home, Course Library, Achievements, Live Sessions, and Collapse Menu. The main content area shows 'Course Library / 103: Marketing Automation Strategy'. Below this, there's a course card for '103: Marketing Automation Strategy' with a 'Start this course' button. At the bottom, a list of course modules is shown: Live Workshop, Homework, Quiz: Marketing Automation Strategy (100% Passmark), and Marketing Automation Strategy.

Questions?



Robert Kohnke
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Max Spector
Sr. Product Manager

Join the Act-On Community

Grow your network of Brand, Demand & Expand marketers

Get answers to your questions directly from Act-On experts

Share your product ideas & exchange marketing best practices

Keep up-to-date on Act-On products, services, training & events

Have fun with contests, points & badges

community.act-on.com

The screenshot shows the Act-On Community website interface. At the top, there is a navigation bar with the 'act-on' logo and 'COMMUNITY' text. Below the navigation bar are several menu items: HOME, DISCUSSIONS, NETWORK, NEWS & EVENTS, PARTICIPATE, UNIVERSITY, and MODERATORS, along with a search bar. The main content area features a large banner with the text 'A SPACE FOR YOU POWERED BY ALL' and a 'GET STARTED' button. To the right of the banner is a circular graphic showing a group of people around a table with a large blue 'i' icon. Below the banner, there are sections for 'Unlock the answer' (with an 'ASK A QUESTION' button), 'FEATURED DISCUSSION' (with a discussion titled 'RE: What email subject lines have been most successful...'), and a 'FEATURED MEMBER' profile for Becky Montchal, Director of Marketing at Symmetry Software. At the bottom of the page, there are four badges: CONTRIBUTOR (25), CREATOR (50), VIDEO CELEBRITY, and EVENT HEADLINER. The Act-On logo is visible in the bottom right corner.