

How To:

# Segmenting Leads And Applying Workflows

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Learn how to use SharpSpring to segment and target a specific audience with your marketing communications. In this example, we'll show how a veterinarian's office uses this easy segmentation technique to target its clients with more relevant information, but the same principles apply to any business. The vet segments cat owners from dog owners using custom fields that hold information about each customer's pet type. These fields are not standard SharpSpring fields (e.g., address, phone, etc), and must be created.

## Learn How To:

- Import a list of leads using custom fields
- Segment your leads using dynamic lists
- Construct an email drip campaign
- Direct the campaign at a segment of your mailing list

## Why It's Helpful:

- Drive leads to conversions with relevant, targeted information
- Promote specific services to your client base
- Boost engagement with your client base

## Watch And Learn:

This example was part of a SpringBoard Live how-to session. [View on-demand video.](#)

## The Situation

For a veterinarian, keeping track of whether clients have cats or dogs or both can be a long and complicated process - especially when it comes to yearly vaccinations and check-ups.

Through SharpSpring, the vet can segment clients based on their pets and their specific requirements, and send automated email notifications to clients when it's close to the time their pets are due.

This also allows the vet to send clients targeted promotions based on pet type or other specific interests (e.g., dog training, cat grooming, flea vaccinations).

## How To Do It:

*Record the Data & Save It as a .CSV*

Be sure to record every piece of information that you may find useful in a spreadsheet. To begin with, the vet recorded the client's first name, last name, email, company and pet's name. Save the file as a .CSV so you can use it in SharpSpring.

**\*SharpTip 1:** The First Name, Last Name, Email and Company columns are required in order for the import to work. The fields within the Company column don't need to have information, but this is required to be in the CSV file for import.

## Import the .CSV to SharpSpring

This is useful for uploading external information to SharpSpring quickly and easily.

1. Navigate to Contacts and select Import Tool.
2. Click Choose a File and select the file that you want to import. The checkmark on the Choose a File button indicates your file has been imported.

**\*SharpTip 2:** If you hover over the Choose a File button, you can see which file you selected.

3. Click Upload CSV File.
4. All of the columns from your original spreadsheet will display on the left, and you can match them to fields in SharpSpring on the right. To create a new field that doesn't already exist in SharpSpring, select Make Custom Field. You can go back later to build out this field.

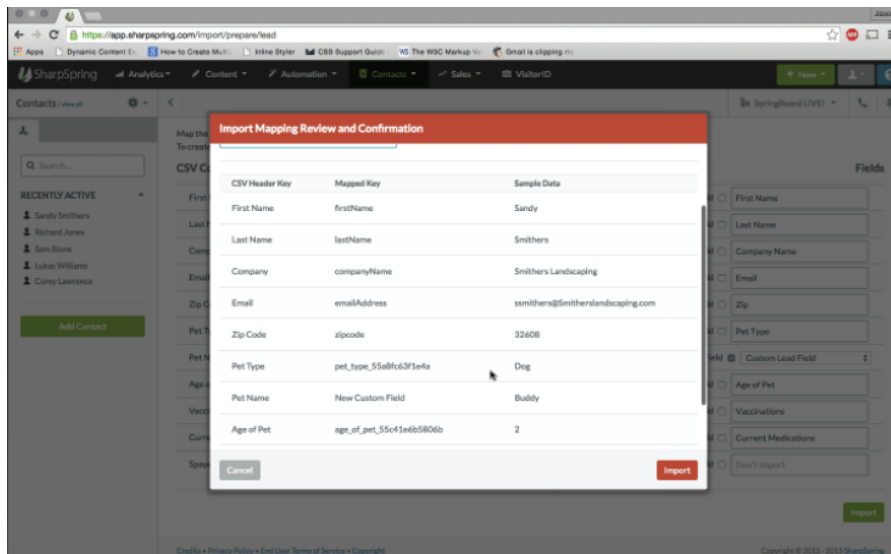
Map the following column names to a field in SharpSpring. By default, unassociated fields will not be mapped.  
To create a new custom field from the column, select "Make Custom Field."

CSV Columns	Fields
First Name	Make Custom Field <input type="checkbox"/> First Name
Last Name	Make Custom Field <input type="checkbox"/> Last Name
Company	Make Custom Field <input type="checkbox"/> Company Name
Email	Make Custom Field <input type="checkbox"/> Email
Zip Code	Make Custom Field <input type="checkbox"/> Zip
Pet Type	Make Custom Field <input type="checkbox"/> Pet Type
Pet Name	Make Custom Field <input type="checkbox"/> Don't Import
Age of Pet	Make Custom Field <input type="checkbox"/> Age of Pet
Vaccinations	Make Custom Field <input type="checkbox"/> Vaccinations
Current Medications	Make Custom Field <input type="checkbox"/> Current Medications
Spayed/Neutered	Make Custom Field <input type="checkbox"/> Don't Import

[Import](#)

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5. Click Import, type "confirm" in the popup box, do a quick review to be sure the information is correct, and click Import.

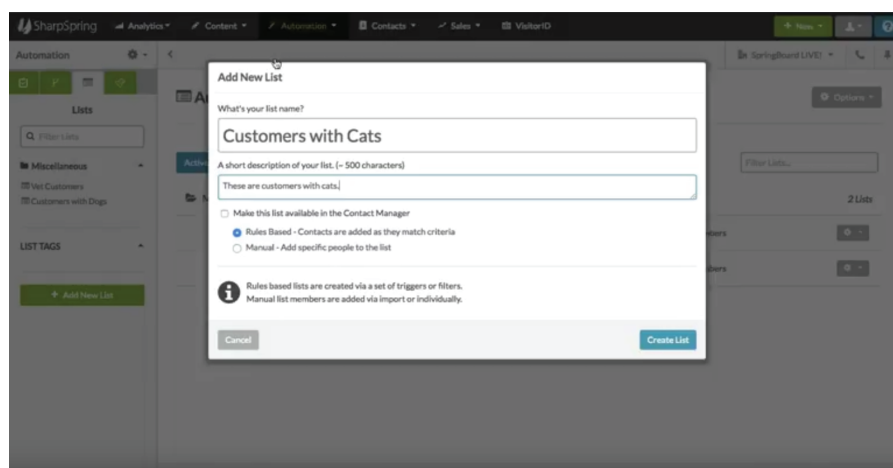


6. Click View List to go back and see the custom fields you created.

## Segment Your Contacts

The next step is to segment your contacts and leads by common interests or attributes (this is based on their responses on the form).

1. Navigate to Automation > Lists.
2. To create a list of contacts who share a common attribute (such as all clients who own cats), you need to create a dynamic list. (A list is 'dynamic' when contacts who match the list criteria are automatically added to the list upon being added to SharpSpring). Click Options, then select New List, and type in your new list name.

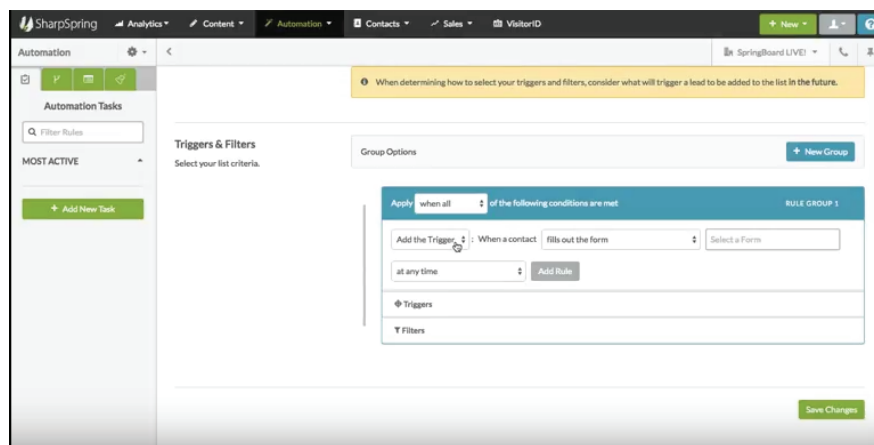


3. Be sure to mark the list as a Rules Based list so that future contacts who match the criteria for the list are added to it (e.g., all contacts with cats). Once you're happy with the settings, click Create List.

**\*SharpTip 3:** *New contacts are continually added to lists that match their criteria, such as new clients who own cats. Static Lists only add your current contacts who own cats and do not update dynamically.*

4. Once you have clicked Create List, you'll be provided with the properties of that list. Under Triggers and Filters, you can set the list to add contacts when any of the conditions are met or when all these conditions are met next to "Apply."

The vet can automatically add owners who only have cats or owners who have cats and dogs, depending on which option he selected.



5. Once you have decided when the rules apply, you need to adjust the properties of the rules. You can adjust whether the rule is a trigger or a filter, to which field in your data you want to apply the rule, and what you want to look for. Once you're done, click Add Rule.

In the example, the vet sets the rule as a trigger for when a contact changes the field identified as "Pet Type" to include the word "cat." This rule will add a contact to a list whenever the "Pet Type" field contains the word "cat."

## Create a Drip Campaign

Once you've segmented your leads, you can send targeted drip email campaigns to them. Before you begin the following steps, you should create the emails you'd like to send using the SharpSpring email editor. You can then add them to a drip campaign via a workflow.

In the example, the vet could email customers three-month vaccination reminders, promotions for grooming, one-week check-in reminders, and other information targeting their specific interests or needs.

1. Navigate to Automation > Workflows. Select Options, then Create New Workflow.

The screenshot shows the SharpSpring Automation interface. The top navigation bar includes 'SharpSpring', 'Analytics', 'Content', 'Automation', 'Contacts', 'Sales', and 'VisitorID'. The left sidebar has 'Automation Tasks' with a search bar and a list of tasks. The main area is titled 'Dog Post Yearly Check Up Drig Campaign / Edit'. It contains a 'Workflow' section with a 'Workflow Name' field and two checkboxes: 'Create a time-based workflow utilizing a custom field' and 'Make this workflow available in the contact manager.'. Below this is an 'Events' section with a description 'When and what should your workflow accomplish.'. It features a configuration for a 1-week event: '1 Weeks after start send the email 1 Week Check In - How is your pet'. There is an 'Add Action' button and a 'Save Changes' button at the bottom right.

2. After naming your workflow, you need to add the actions that will tell SharpSpring what should happen and when.

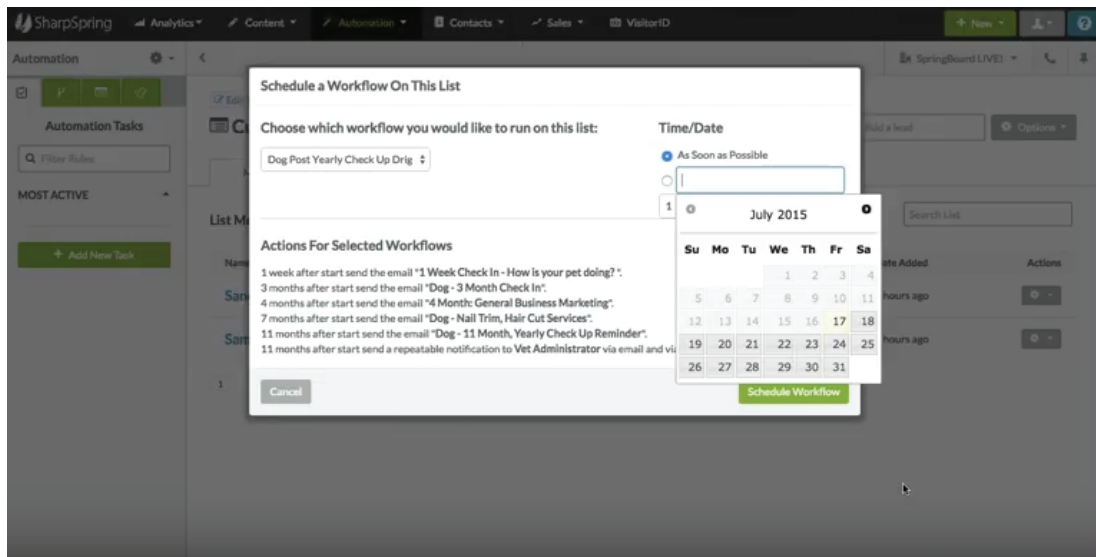
In our example, the vet added a one-week waiting period before sending out the one-week check-in email. This means that after a contact is added to the workflow, one week will pass before they receive the email. The vet went on to add subsequent emails to be sent three months, seven months and one year after the workflow begins.

Finally, the vet selected to send email and text notifications to specified employees whenever these messages went out in order to help staff stay on top of customer service.

**\*SharpTip 4:** Actions are not limited to sending emails. You can add to a list, remove from a workflow, and a whole lot more.

3. To add your segmented lists to the workflow, navigate to Automation, then click Lists. Under Lists, select the segment you want to work with. Select Options, then click Schedule a Workflow. Here, you can select when to add these leads to the workflow and view a summary of the workflow actions you have selected.

The vet could choose between two lists of contacts - one with cats and one with dogs - and assign workflows to their relevant lists (e.g., assigning Dog workflow to the Dog contact list).



***\*SharpTip 5:** To add a single contact to your workflows whenever you want, navigate to Contacts, select the contact you want to add, click Options, then Add to Workflow.*

