



# 5 ways to become a segmentation sniper

Recommendations for marketing  
professionals

You think you know.

High rollers versus casual customers – what they want, when they buy, how much they spend. Partners who bring in profitable customers – and those who don't. Programs worth the bucks because they drive hot leads for a reasonable cost.

Think again.

When you dig into the analysis that underlies strategy and tactics for most marketing professionals you expose more gut-instinct than facts. For a long time this has worked. Experience, relationships and impressions have defined success. But in today's environment of scrutinized spending and measurable impact, tenure in an industry or a sell-out event is not enough to define success. Marketing must become more astute, more accountable and more impactful.

A cornerstone to this evolution is putting your data to work for you. By expecting more out of your data it will bring precision and depth to your knowledge about everything from which markets to target and which channels to use. You've got rich information within marketing and CRM systems, not to mention data warehouses, databases, third-party and social media. But having the data isn't enough.

Converting marketing data to laser-focused, actionable knowledge requires more. Five strategies stand out to make this data work for you:

- 1. Go beyond the basics**
- 2. Add micro-segmentation**
- 3. Mix & match data sources**
- 4. Map your data**
- 5. Share and refine**

With these steps you will become a segmentation sniper, delivering precise marketing impact and measurable results.

## 1 Go beyond basics

Most segmentation exercises churn out groups based on conspicuous, relevant demographics such as size, industry, gender or age. These are important building blocks, but if you stop there you are likely missing relationships that exist between these foundational categories that can take your segmentation from good to great.

Start by exploring relationships between the data you already use. For example, look at the relationship between gender and age, then add a layer for education, location and married or single. Drill into the connections among channels, product mix and pricing to see if you're optimizing for all your environments. You might find an audience or a channel that is driving outsized results.

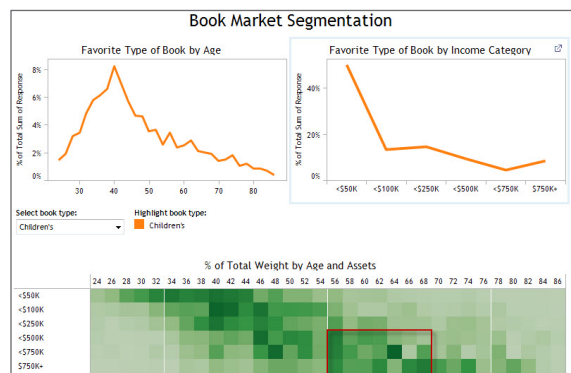
While seemingly obvious, many marketing professionals don't take these steps. But going beyond the basics is critical to get the most out of your foundational data and generate insight that will help you spend effectively, drive measurable impact to your organization and separate yourself from your competition.

## 2 Add micro-segmentation

Now that you've exploited the basics, you can start seeing new opportunities from your segmentation. Don't stop there. With the droves of information available today and the control you have over your marketing efforts, micro-segmentation strategies can make your tactics more precise.

Micro-segmentation drills into your topline segmentation and identifies behaviors and preferences that will provide the foundation effective investment. It's one thing to know your segment of female, 30-39, working professionals like to purchase suits. But what if you can validate that they prefer shopping at one discount retailer more than another and they shop most often on Saturday morning? Especially as technology improves to target real-time actions with relevant promotions and

experiences, knowing as much as possible about your segments empowers you to effectively market to key audiences.



**Figure 1: Going micro with books**

*While children's books are most popular with readers in their thirties (probably parents), this micro-segmentation reveals that it's the grandparents who likely have more disposable income to make these purchases. This insight leads to targeted campaigns to this market for this category.*

### 3 Mix and match data sources

It's easy to get in the rut of analyzing what is convenient. But by limiting yourself to data at hand, you risk missing depth, insight and opportunity. Campaign tracking and CRM solutions are great on their own, but are you considering them together? What about transactional data and third-party information?

Connecting data sources reveals deeper insight and should be a mainstay of segmentation projects. If you're not taking the time to bring together disparate data sources, you're not seeing the entire picture. Exploring blended data puts a spotlight on new segments or offers characteristics about the segments you have identified. This in turn drives targeted – and more effective – tactics to go after these opportunities. Overlaying demographics, spending patterns and purchase channel, for example, all of a sudden illuminates relationships that could lead to new priorities about which partners to work with, how much to invest and which subset of products to promote in a given outlet.



**Figure 2: Combine sources of data for rich analytics**

*Data that lives in an excel sheet, data warehouse or third-party system can be valuable for segmentation unto itself. By adding a second set of data and blending the two your segmentation possibilities become significantly more powerful.*

## 4 Map your data

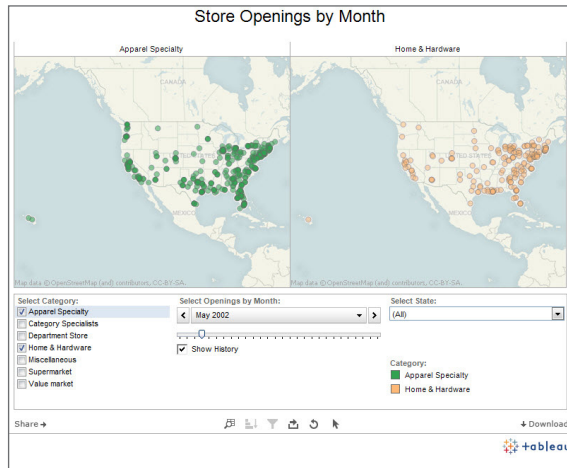
When you're planning a trip, whether it's cross-country or across town, you anchor most major decisions in maps. Do the backroads or freeways meet my needs? Is there a direct bus or should I drive? Turn to maps for the same insight about your segmentation possibilities.

Customer profiles, product mix, channel type are just a few examples of data brought to life on maps. Creating a map that allows you to zoom in or zoom out to understand both macro and micro trends will bring a level of specificity to your segmentation strategies and tactics you cannot glean from spreadsheets or pivot tables.

“ Because Tableau is powerful and easy to use, our analysts can rapidly uncover and deliver important insights that improve our clients’ campaigns.

In today’s marketplace, that time saved may be Tableau’s greatest benefit. ”

– Ben Winkler, The Martin Agency



**Figure 3: Make “where” part segmentation**

*Mapping your segmentation possibilities highlights patterns and reveals opportunities not easily detected in pivot tables or spreadsheets. Adding a map to your segmentation is easy and essential to get the most out of your marketing budget.*

## 5 Share and refine

It's one thing to satisfy your need to create meaningful segments. It can be quite another to convince others your answers are the best. But it's a must. Getting others on board – whether they're executives or team members – is a mandatory step to put your segmentation to work. Sharing your segmentation insights relies on two factors: showing it in an intuitive manner and providing easy access.

Creating dashboards that contain relevant charts, tables and other information about your segmentation is the first step to effective sharing. This gives viewers the opportunity to quickly understand your segmentation and then drill into it. By providing your audience this ability to ask questions and get answers, they can share ownership of the direction you want to head and have the information to provide valuable insight.

Communicating your dashboard is the second step to sharing your segmentation. Sending a spreadsheet or slide deck in email doesn't cut it to assure the reader that they're not seeing something stale. Sharing using links to data that serves up accurate, consistent material creates confidence on the part of executives and team members alike that what they're viewing is the latest and greatest, with current data that gives them maximum insight. And it leads to richer discussions that provide new angles on your analysis.

## Bring laser-focus precision to your segmentation

Becoming a segmentation sniper is about mandating that one of your greatest assets – your data – provide laser-focus accuracy about how to align your marketing strategy and tactics with great segmentation. From building confidence in your core segmentation to deriving new perspective about prospects you might not have considered, demanding more from your data to drive segmentation precision yields more effective marketing initiatives that drive measurable return to your organization.

## Tableau: Solution for segmentation snipers

From consumer goods and manufacturing to game design and healthcare, marketing professionals are turning to Tableau to transform into segmentation snipers. Tableau is a next-generation business intelligence solution that provides an intuitive way for marketing professionals dig into their data for unparalleled insight. Whether it's adding a map to your analysis with a single click or blending two data sources for richer insight, Tableau creates an environment where segmentation that optimizes your strategy and tactics becomes second nature and can be executed in record time. Download your free, full-featured trial of Tableau to start exploring your data for segmentation insights today.

## About Tableau

Tableau Software helps people see and understand data. Ranked by Gartner and IDC in 2011 as the world's fastest growing business intelligence company, Tableau helps anyone quickly and easily analyze, visualize and share information. More than 10,000 companies get rapid results with Tableau in the office and on-the-go. And tens of thousands of people use Tableau Public to share data in their blogs and websites. See how Tableau can help you by downloading the free trial at [www.tableausoftware.com/trial](http://www.tableausoftware.com/trial).

*Tableau is a trademark of Tableau Software, Inc. All other company and product names may be trademarks of the respective companies with which they are associated.*