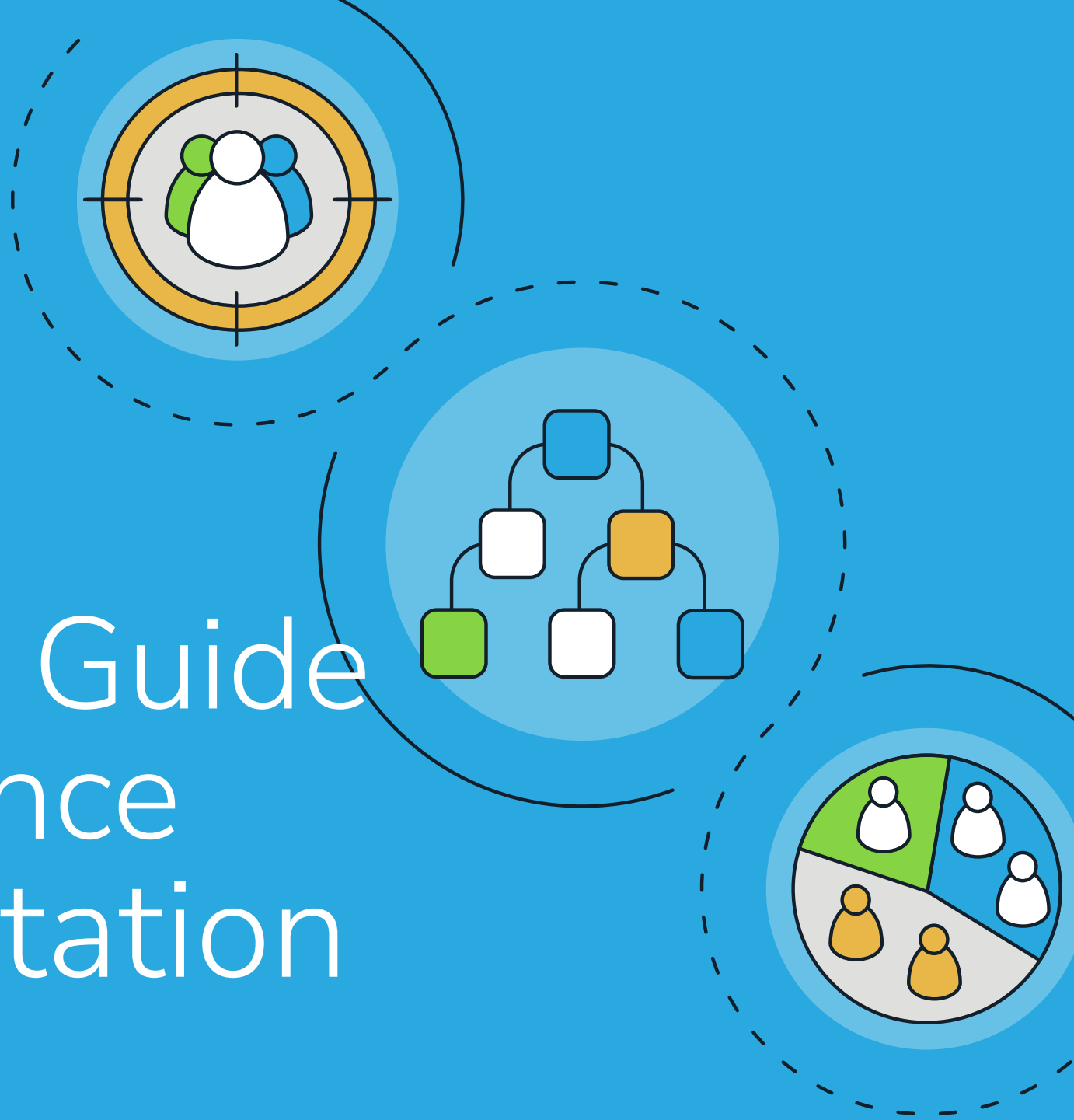


ACTIONIQ

# The B2B Guide to Audience Segmentation



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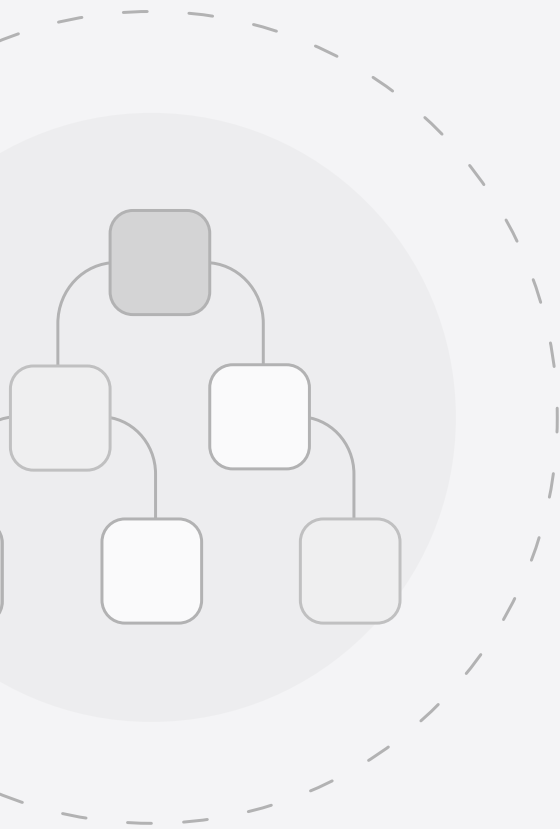
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# Build Speed, Agility & Granularity Into Your Segmentation Strategy



Every team across your business-to-business (B2B) brand holds a piece of the customer puzzle. Whether it's insights from marketing and product teams or intelligence from sales and customer success teams, each part of your organization has valuable customer data to help you better understand your target audiences and engage them accordingly.

Unfortunately, this data is not always actioned on holistically, leading to wasted advertising spend, churned customers and missed market opportunities.

Why? Because in most cases, business teams must go through data analysts or IT professionals to execute even simple tasks, such as customer list pulls. Without SQL expertise to extract and transform data from systems not built for business users, even

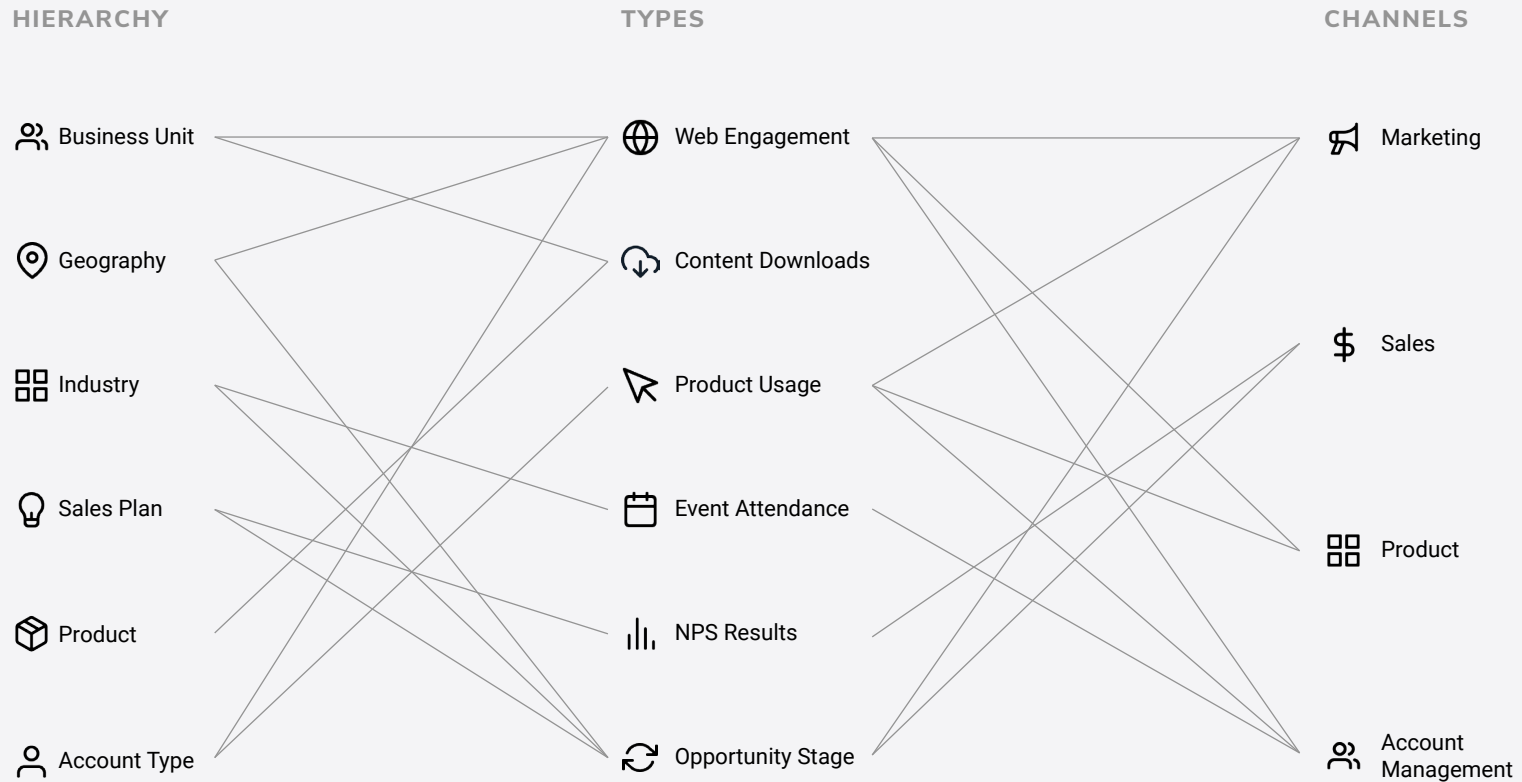
seemingly straightforward tasks can take weeks, if not months. And if requests increase in complexity — such as adding a new filter across accounts, plans or users to build an audience — the process takes even longer.

The result for many B2B companies is static, one-size-fits-all campaigns that leave significant revenue and growth on the table.

As buying committees continue to grow — and their customer journeys become increasingly complex — [successful audience segmentation](#) demands speed, agility and granularity.

**In this guide, we'll outline how you can improve your B2B segmentation strategy and use it to drive more business value.**

# B2B Data Complexity



⚙️  
**Complexity limits customer data access and activation**



⚙️  
**Dependence on IT for customer insights grows**



⊘  
**Long lead times leads to static, ineffective campaigns**

## STEP 1

# Enable Business Teams to Directly Access Customer Data for Segmentation & Discovery

### CHALLENGE

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Marketers today are highly dependent on IT to build hyper-targeted customer segments. In addition to waiting weeks or months for a team member with SQL knowledge to pull a customer list, marketers must contend with duplicative, messy or just plain unusable data that requires hours of reformatting and cleaning. With customer contacts frequently changing roles, the customer lists of yesterday are not always relevant today.

Many marketers make do with subpar insights – operating on old and outdated information – or are forced to fly blind. This means relying on hunches instead of factual information, resulting in poor customer experiences.

### SOLUTION

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With more digital interactions (not to mention more personas interacting with campaigns), it's critical for customer-facing teams to engage individuals at the right time and on the right channels. In short, business teams need to be able to build segments on their own and in real time.

By providing them with [governed access to a no-code, intuitive user interface](#), marketing, sales and customer service teams will have direct access to the customer data they need to quickly develop dynamic segments. And since this enables teams to get more granular in their segmentation, they'll be able to provide more personalized customer engagement across the buyer lifecycle.

## STEP 1

## Example Use Cases

| USE CASE  | DESCRIPTION  | BENEFITS  |
|---|--|---|
| <p><b>Accessing prospect, customer and account insights</b></p>  | Providing a holistic view of customer interactions that occur across teams.  | <ul style="list-style-type: none"><li>• Increased account engagement</li></ul>  |
| <p><b>Engaging high-propensity prospects</b></p>                 | Identifying cohorts based on high, medium and low response interaction propensity.   | <ul style="list-style-type: none"><li>• Increased customer engagement</li></ul>   |
| <p><b>Suppressing converted customers</b></p>                   | Removing existing customers and prospects from paid media campaigns.   | <ul style="list-style-type: none"><li>• Reduction in paid media costs</li></ul>   |
| <p><b>Supporting data privacy and governance</b></p>           | Safeguarding sensitive customer information and complying with data security and privacy regulations while achieving growth through data-driven personalization. | <ul style="list-style-type: none"><li>• Improved data quality</li><li>• Data and process standardization</li><li>• Data democratization</li></ul> |

## STEP 2

# Segment & Target Audiences Across Multiple Hierarchies & Dimensions

### CHALLENGE

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The buyers, champions and users you're targeting may vary significantly throughout the B2B buying cycle, as personas can span teams and consist of multiple individuals. But even if you tailor your messaging for each and every persona, your strategy will stagnate if other buyer details aren't taken into account. For example, where is the customer in their journey? What industry are they in? What type of account do they represent? Where are they located? How often do they use specific products? Messaging that doesn't adequately communicate value based on these various dimensions could be seen as a source of frustration for the customer, and make it that much harder to get high-propensity leads into your funnel.

### SOLUTION




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Go beyond targeting at the persona level only and [look at prospects multi-dimensionally](#).

Audiences need to be segmented based on company, persona, buying stage and behaviors. As these segments are created, new prospects that show high intent should automatically be added.

When audiences become dynamic and fluid, business teams can more efficiently direct spend and offers to the highest-propensity customers, driving more high-quality leads into the funnel.

# Example Use Cases

| USE CASE  | DESCRIPTION   | BENEFITS  |
|---|---|---|
| <p><b>Targeting multiple dimensions</b></p>              | <p>Segmenting and targeting audiences across multiple dimensions and hierarchies (e.g., account types, subscription plan, user behaviors, geography, opportunity type, etc.).</p> | <ul style="list-style-type: none"><li>• Increased account engagement</li></ul>            |
| <p><b>Identifying intent signals</b></p>                 | <p>Accessing indicators that identify accounts or personas that are actively showing interest in products or services.</p>  | <ul style="list-style-type: none"><li>• Increased marketing-qualified leads</li></ul>     |
| <p><b>Creating high-value lookalike audiences</b></p>  | <p>Leveraging predictive models to create new high-value audiences based on existing customers.</p>   | <ul style="list-style-type: none"><li>• Reduction in customer acquisition costs</li></ul> |



# Automate & Scale Personalized Omnichannel Experiences

## CHALLENGE

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When marketers want to activate and orchestrate a new campaign, they often have to redefine and re-pull their customer lists. Continuously defining audiences, targeting them and trying to facilitate interactions on buyers' channels of choice is burdensome.

Current strategies are typically manual, and as consumer expectations for convenient, individualized experiences continue to grow, the need for speed is obvious.



When marketers are continuously waiting on list pulls, experiences can't be activated in real time, jeopardizing conversion. Higher customer churn is also likely to occur, as customers who are not engaging with the product may not be identified and appropriately nurtured.

## SOLUTION

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As B2B organizations get more granular in their targeting, they'll need to invest in [automating and scaling customer experiences](#) across different channels. Segments should be updated automatically, and experiences should be orchestrated as quickly as possible across all online and offline channels. After you've defined your audience, continuously iterate and activate experiences across it in real time. A timely message can reengage at-risk customers and customized offers can turn prospects into brand loyalists. Business teams need to make sure their target lists are constantly evolving and the right messages are communicated across all relevant channels. Automation is fundamental to making this happen. When B2B businesses invest in automation, they increase efficiency and avoid manually analyzing every new contact that enters their funnels. This supports better cross-channel targeting and conversion growth as the right customers are targeted as soon as their intent scores rise.

## Example Use Cases

| USE CASE  | DESCRIPTION   | BENEFITS  |
|---|---|---|
| <p><b>Updating audiences continuously based on new data</b></p>      | Building, running and iterating on audience lists in real time.   | <ul style="list-style-type: none"> <li>• Improved speed to market</li> </ul>                                      |
| <p><b>Improving onboarding and adoption</b></p>                      | Attaching product usage data to user profiles and providing teams with the data needed for more guided conversations. | <ul style="list-style-type: none"> <li>• Increased product usage</li> <li>• Higher net promoter scores</li> </ul> |
| <p><b>Converting trial users to paid accounts</b></p>              | Targeting high-propensity trial users with customized offers and sales conversations.                                 | <ul style="list-style-type: none"> <li>• Increased paid subscribers</li> </ul>                                    |
| <p><b>Identifying new cross-sell and upsell opportunities</b></p>  | Identifying new opportunities to cross-sell and upsell existing clients.  | <ul style="list-style-type: none"> <li>• Customer lifetime value growth</li> </ul>                                |

# Achieve B2B Hyper-Segmentation



Today's B2B organizations face more competition than ever before. That means customers have no shortage of choices if experiences don't meet their expectations. If you don't catch your audience at the right time and place, buyers will end up further along in a competitor's funnel. Segmenting audiences should be the first step in defining your marketing strategy. Once this is complete, the experiences that come after will be much easier to orchestrate. When you get your audience segmentation strategy right, the payoff is plentiful. B2B organizations that attain a deeper understanding of their buyers, build

hyper-segmented audiences and explore ways to automate audience targeting and engagement will not only see more revenue growth, but be able to identify and prioritize their spend across their most valuable segments. Giving business teams self-service access to an easy-to-use UI where they can independently build and iterate on their customer lists is critical — you'll relieve frustration and accelerate speed to market. Even better, you'll set up your B2B organization to **dive deeper into customer insights and orchestrate the impactful experiences modern customers demand.**

✉ [Contact ActionIQ](#) for a consultation with one of our expert team members to learn how you can take your audience segmentation strategy to the next level.



## About ActionIQ

ActionIQ is at the center of a data-driven revolution that is changing the way brands think about customer experience, digital transformation and the value of customer data as a core corporate asset. We concentrate on solving enterprise data challenges so that teams are empowered to create authentic customer experiences across all brand touchpoints. ActionIQ helps enterprise companies by connecting their first-party customer data, providing an easy-to-use interface for business users to access customer insights and enabling customer experience orchestration across channels. We are helping brands like The New York Times, Pandora Media, The Hartford, Shopify, American Eagle Outfitters and others grow customer satisfaction and revenue.

