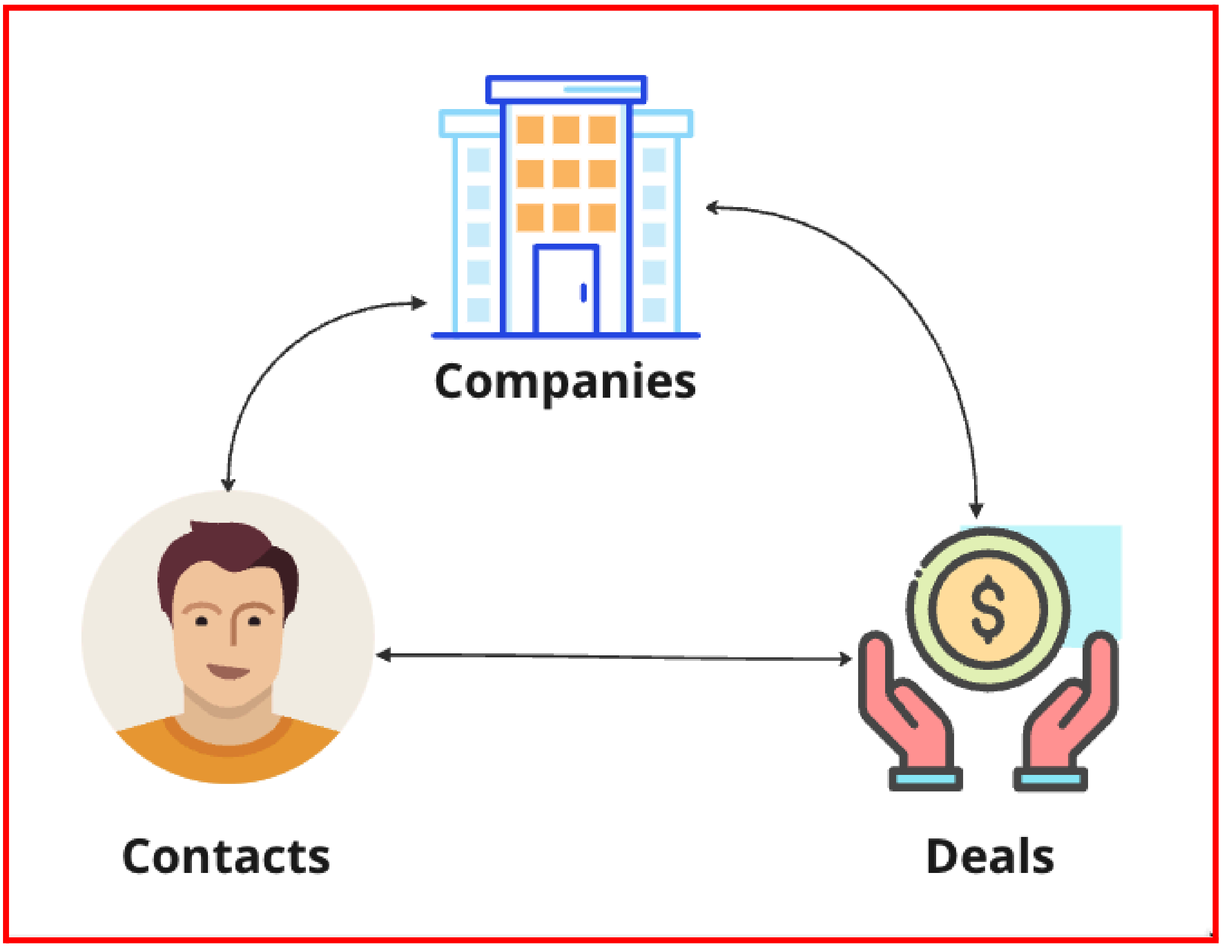
Understanding Segments in HubSpot

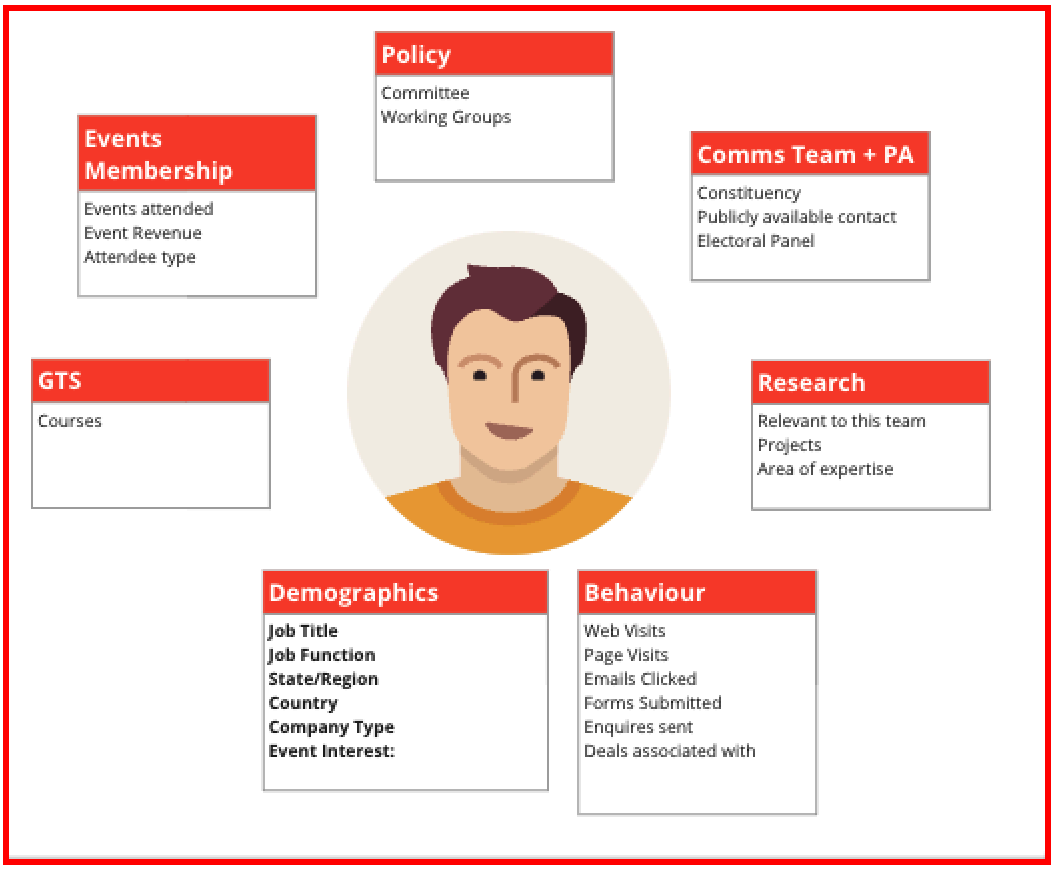
Marketers and super admins need to have a really good understanding of HubSpot's different objects (contacts, deals, companies, tasks etc), how it stores data in these different objects and how these objects relate to each other.

With this understanding it will become easier and clearer to build segments and lists in the tool.



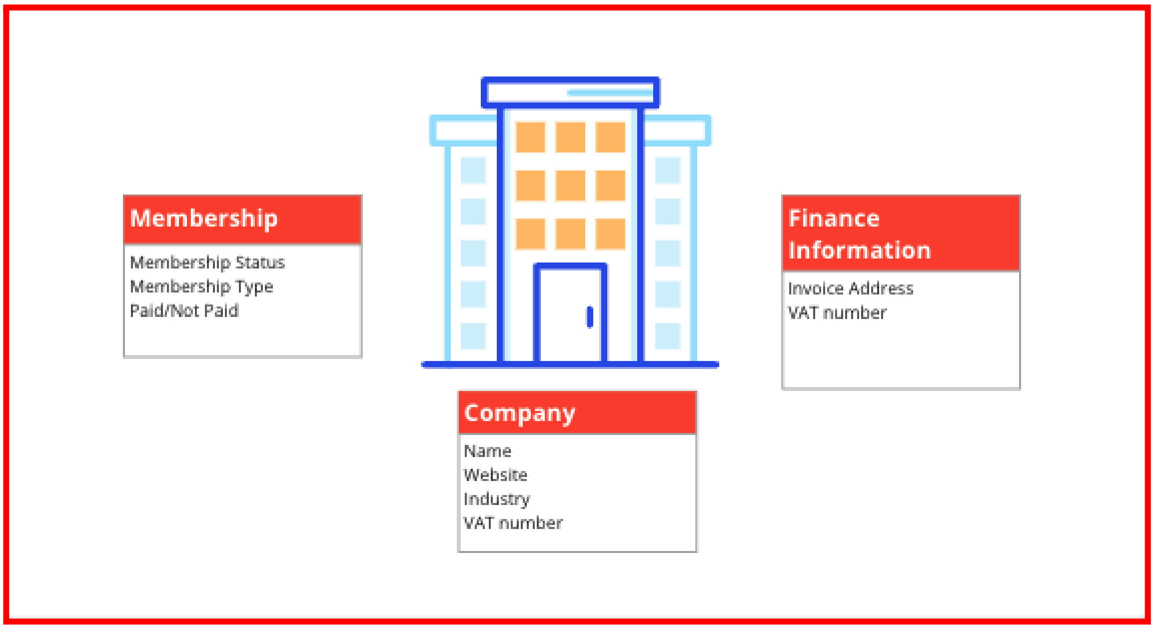
Essentially the majority of information is stored in three main buckets: **You can watch an explainer here >**
https://www.loom.com/share/ceab58c065404c2ba529ded7d3ce075c?highlightComment=13019659&t=59

This is what HubSpot currently stores / records for Contacts



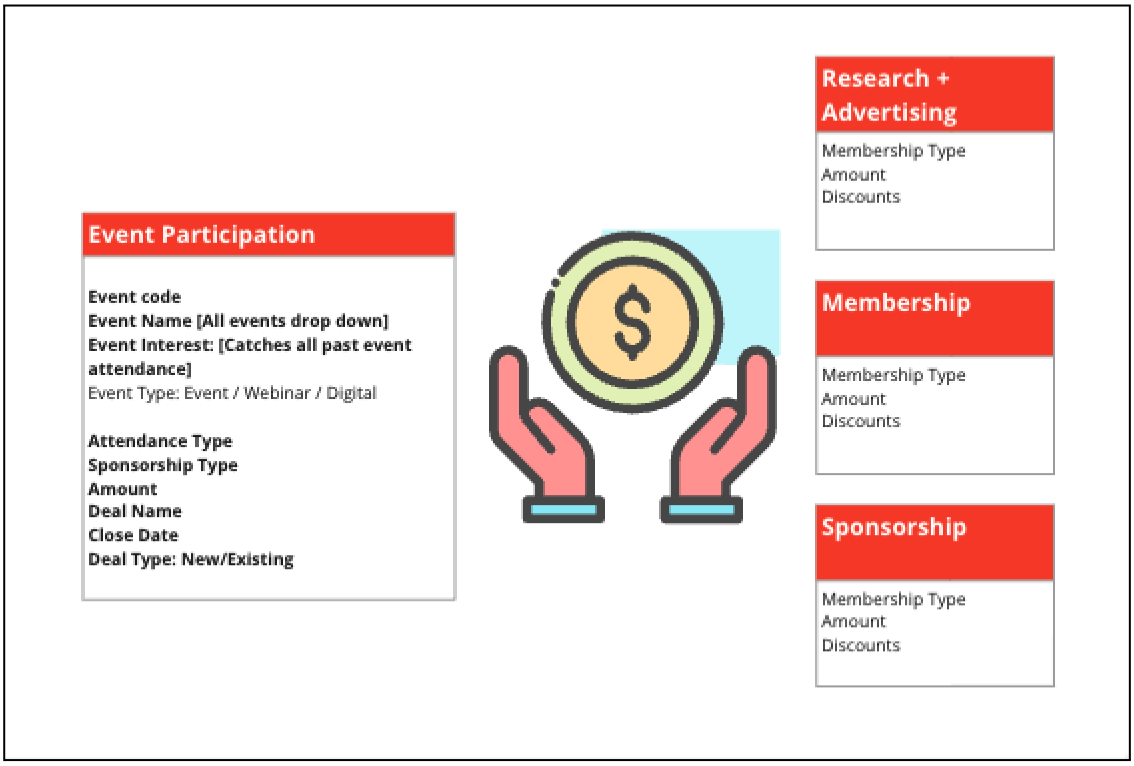
In addition HubSpot has a set of default Contact properties which you can find here: https://knowledge.hubspot.com/contacts/hubspots-default-contact-properties

This is what HubSpot currently stores / records for Companies



In addition HubSpot has a set of default COMPANY properties which you can find here: https://knowledge.hubspot.com/companies/hubspot-crm-default-company-properties

This is what HubSpot currently stores / records for Deals



In addition HubSpot has a set of default DEAL properties which you can find here: https://knowledge.hubspot.com/crm-deals/hubspots-default-deal-properties

Understanding Segments in HubSpot

Here is a general overview from HubSpot Academy > https://academy.hubspot.com/lessons/understanding-segmentation-in-hubspot

Lists / Segments / Buckets / Groups whatever you call them, the "Lists" tool in HubSpot is the real power and magic from HubSpot.

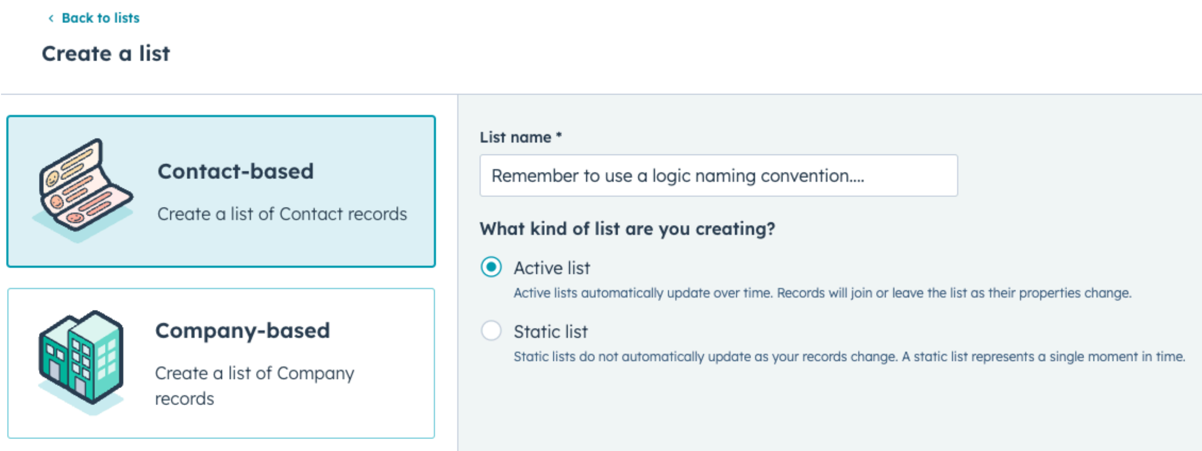
Lists are an important part of your marketing. Beyond email sends, lists can help you identify how many contacts in your database have certain traits in common. But HubSpot's Lists App becomes an even more powerful tool when you're using lists to create reports.

Every report should begin with a segmented list. The most specific your report's starting list is, the more powerful the report is. For example, let's say you run a report based on all of the contacts in your database. You'll gather conclusions at a high level on your entire database based on that information, yet the contacts in your database when reported on in segments may be very different.

Everything You Can Do With Lists in HubSpot

Start by going to **Contacts > Lists**.

Click on **Create a new list** at the top right.



There are two types of lists:

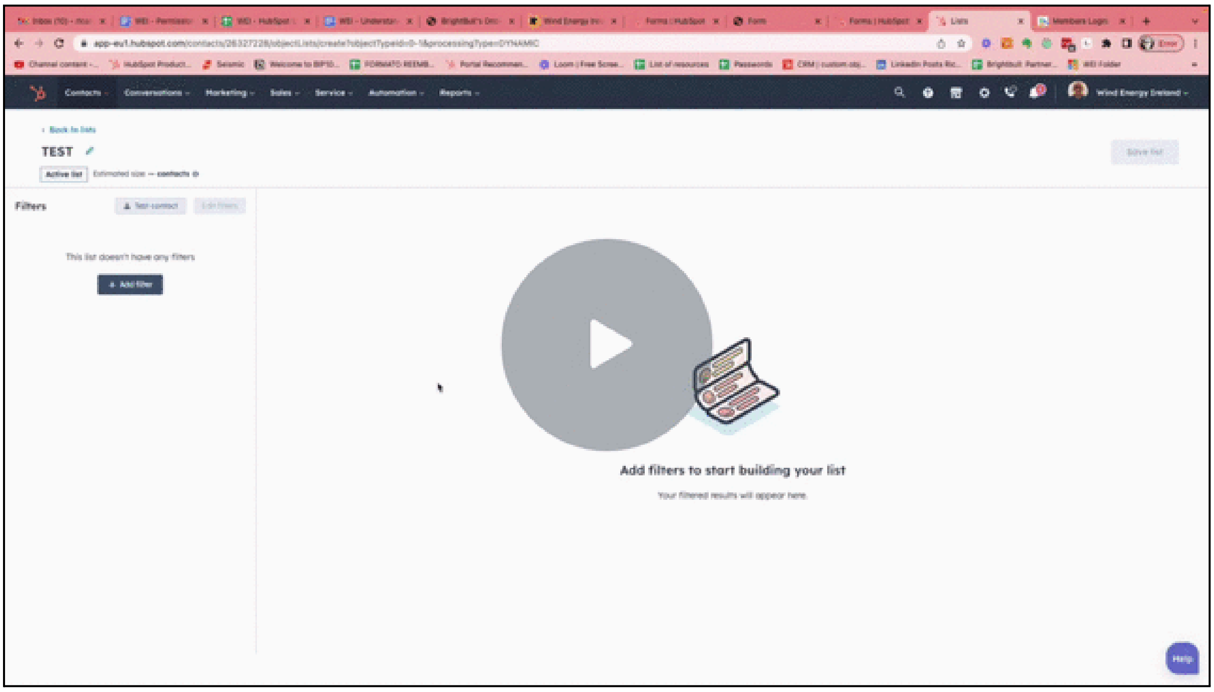
- **Active lists:** these lists automatically update, so records will join the list whenever they meet the criteria and leave the list when they no longer meet the criteria. For example, you can use an active list when you want to send multiple email campaigns to a particular subset of subscribed contacts, and you want the list to update with new contacts who meet the criteria over time.

- **Static lists:** these lists do not update as new records meet or existing records no longer meet the criteria. They are a snapshot of records that meet a certain set of requirements when the list was created and saved. A static list can be helpful to gain an understanding of contacts or companies who met a certain criteria on a particular date, for example, contacts collected from a trade show or a webinar. Records can also be [manually added and removed from static lists].

Generally you should be creating Active Lists

VERY IMPORTANT: You must always add to your search criteria the CONTACT property that will determine the Database you are selecting from:
WEI-DB > YES o GTS-DB > YES

WEI - Always include WEI-DB or GTS-DB in your list selection - Watch Video

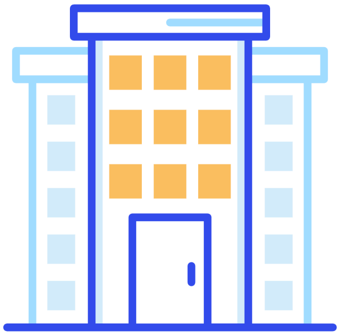


#1 Build a List off a Contacts Property

First, you can build a list off of any contacts property in your database. If you want to create a list based off of people who have the same Lifecycle Stage, you can do that. If you want to create a list based off of people who have been added to your contacts database from just Social Media, you can do that. You may literally have hundreds of pieces of information on your contacts. You can use any of that data to create your list.

CONTACT PROPERTIES THAT HELP US SEGMENT BASED ON WEI CUSTOM PROPERTIES	
Committee	Important field that determines the committee a contact belongs to
Working Groups	Important field that determines the working group a contact belongs to
County of residence	Which county in Ireland the contact is in
Country	Country of residence if outside Ireland
Privacy Agreement	GDPR Explicit agreement
Job Title	A contact's job title
Request a course	
CC	
Mailchimp Tags	Legacy tags brough over from Mailchimp
HubSpot Score	The number that shows qualification of contacts to sales readiness. It can be set in HubSpot's Lead Scoring app.
Area of Expertise	Denotes the area of expertise required by the research team
Constituency	Used by the Comms team and the list of TDs by PA
Media Contacts	Used to tag if a contact is part of media or not
WEI-DB	Contacts that belong to WEI Database set > Important for email campaigns
GTS-DB	Contacts that belong to GTS Database set > Important for email campaigns

CONTACT PROPERTIES THAT HELP US SEGMENT BASED ON BEHAVIOUR	
First Referring Site	URL that referred the contact to your website. Set automatically.
First Touch Converting Campaign	Campaign responsible for the first touch creation of this contact.
Last Referring Site	Last URL that referred contact to your website. Set automatically.
Time Last Seen	Timestamp for most recent webpage view on your website.
Last Touch Converting Campaign	Campaign responsible for the last touch creation of this contact.
Time of Last Session	Timestamp for start of the most recent session for this contact to your website.
Number of Pageviews	Total number of page views this contact has had on your website. Set automatically.
Number of Sessions	Number of times a contact has come to your website. Set automatically.
Original Source	First known source the contact used to find your website. Set automatically, but may be updated manually.
Original Source Drill-Down 1	Additional information about the source the contact used to find your website. Set automatically.
Original Source Drill-Down 2	Additional information about the source the contact used to find your website. Set automatically.
Latest Source	The source of the latest session for a contact
Latest Source Drill-Down 1	Additional information about the latest source for the last session the contact used to find your website. Set automatically.
Latest Source Drill-Down 2	Additional information about the source for the last session the contact used to find your website. Set automatically.
Latest Source Date	The time of the latest session for a contact
First Conversion Date	Date this contact first submitted a form.
First Conversion	First form this contact submitted.
Number of times contacted	The number of times a call, email, or meeting was logged for a contact. This is set automatically by HubSpot based on user actions in the contact record.
Wind Energy Ireland's - Latest News Email Subscription (English)	Blog Subscription
Became a Customer Date	The date when a contact's lifecycle stage changed to Customer. This is automatically set by HubSpot for each contact.
Number of Form Submissions	The number of forms this contact has submitted
Number of Unique Forms Submitted	The number of different forms this contact has submitted
Recent Conversion Date	The date this contact last submitted a form
Recent Conversion	The last form this contact submitted
Recent Deal Amount	Amount of last closed won deal associated with a contact. Set automatically.
Recent Deal Close Date	Date last deal associated with contact was closed-won. Set automatically.
Total Revenue	Sum of all closed-won deal revenue associated with the contact. Set automatically.
Marketing emails clicked	The number of marketing emails which have had link clicks for the current email address. This is automatically set by HubSpot.
Email hard bounce reason	The issue that caused a contact to hard bounce from your emails. If this is an error or a temporary issue, you can unbounce this contact from the contact record.
Marketing emails opened	The number of marketing emails opened for the current email address. This is automatically set by HubSpot.



#2 Build a List off a Company Property

You can also build a list off of any company property. In addition to the different contacts properties that you have, you will also have separate companies properties. These fields will give information about the company as a whole instead of the individual contacts. Some examples include website URL, industry, and annual revenue.

CONTACT PROPERTIES THAT HELP US SEGMENT BASED ON WEI CUSTOM PROPERTIES	
Mailing List Category	
Member/Student	Member Student Status
Membership Category	Important property that captures the membership level of that organisation. It is a key field for reporting
City	City where the company is located. Powered by HubSpot Insights.
County	
Industry	The type of business the company performs. By default, this property has approximately 150 pre-defined options to select from. While these options cannot be deleted as they used by HubSpot Insights, you can add new custom options to meet your needs.
Lifecycle Stage	The qualification of companies to sales readiness throughout the buying journey
State/Region	State or region in which the company or organization is located. Powered by HubSpot Insights.
Total Revenue	The total amount of closed won deals
Total open deal value	The total value, in your company's currency, of all open deals associated with this company
Number of Associated Deals	The number of deals associated with this company
Recent Deal Amount	The amount of the last deal closed
Recent Deal Close Date	Date of the last "closed won" deal associated with this company record.
Country DD	Country property, standardised as dropdown
Date Joined	The date the organisation joined as a member
2022 Paid	Property used to report Membership Status in 2022
2023 Paid	Property used to report Membership Status in 2023
Primary Interest Onshore/Offshore	Denotes the primary interest of the organisation

#3 Build a List off a Deal Property

Next, you can build a list off a Deal Property. A Deal Property is any revenue amount that you may be pulling in from your CRM. For more information on how to integrate your CRM with HubSpot, see this blog post.

DEAL PROPERTIES THAT HELP US SEGMENT BASED ON OPPORTUNITIES/ BUSINESS WON OR INTENDED	
Attendance Type	Describes the type of attendance to an event
Booking Form	
Dinner	Dropdown which determines if an attendee is coming to a dinner
Event	Dropdown with all list of fortcoming events. It needs to be ticket/selected when creating a deal
Date Joined	Date membership starts
Leaver/Joiner	Used to determine the membership movement
Membership Expirying	Date membership expires
Membership until	Date membership expires
2023 Paid	Confirms if the deal has been paid
Sponsorship/Exhibition	Classifies a Spex Deal Pipeline between Sponsorship or Exhibitor
Type of Sponsorship	Classifies the type of Sponsorship Packages available
Deal Stage	The stage of the deal. Deal stages allow you to categorize and track the progress of the deals that you are working on.
Is Closed Won	True if the deal is in the closed won state, false otherwise
Pipeline	The pipeline the deal is in. This determines which stages are options for the deal.
Amount	The total amount of the deal
Close Date	Date the deal was closed. This property is set automatically by HubSpot.
Deal Name	The name given to this deal.
Deal Type	The type of deal. By default, categorize your deal as either a New Business or Existing Business.
Membership	Classifies a Membership Deal by the type of membership discussion/application

#4 Build a List off a List Membership

You can also build a list off of a current list. You may be thinking that this sounds a bit redundant, but it can actually be a great time saver. If you have another list set up and want to use that criteria along with some additional pieces of criteria, this may be a great way to help you save time while setting that up. Or, if you want to create a list that doesn't include the members of another list you have previously created, this is also another great tool.

#5 Build a List off a Form Submission

You can build lists off of contacts who have submitted any form on your website.

#6 Build a List off Email Actions

Next, you can build a list off of email actions. This means you can build a list based on whether or not your contacts opened certain emails, clicked on links in emails, or even just received an email.

#7 Build a List off Page Views

You can also build a list of the contacts who viewed a specific page on your website(s) or assets that have your tracking code installed.

#8 Build a List off Events

HubSpot Events is an Enterprise-only feature. It allows you to track actions or behavior someone takes on your website. For example, you can track the number of people that click on elements of a page. One great benefit of using Events is you can create a list of contacts based on events. If you want to know who of your contacts took certain actions on your website, you can create a list for that.

#9 Build a List off of Workflows

You can build lists off of contacts who have not completed the workflow or contacts who have completed the workflow.

#10 Build a List off an Integration Action

There are many integrations available from HubSpot that you can use to build lists from: SurveyMonkey, Citrix, Zoom etc. Most integration will allow you to build lists based on certain criteria related to the application/tool.

So always review

#11 There are other criteria that you can select from

The 10 most popular ways to build a list is not a finite list. You can review the list building interface and you will find that you can also build lists based on

- Associated object information
- Associated CRM Activities
- Marketing Interactions with other channels

Understanding Marketing Contacts and Lists

When purchasing a Marketing Hub subscription, you select a contact tier to set a limit to the number of contacts you'll engage with through HubSpot's marketing tools each month (e.g., marketing emails, ads). The contacts included in this tier are called marketing contacts, which are the only contacts that affect the cost of your subscription. Any contacts you don't plan on marketing to are called non-marketing contacts. Non-marketing contacts don't count towards your contact tier, and you're not charged for these contacts.

Now, when building segmentation lists to use in your email marketing, remarketing campaigns or to build audiences for PPC you will need to ensure that all contacts are tagged as "**Marketing Contacts".**

- **How do marketing contacts work >** https://knowledge.hubspot.com/contacts/marketing-contacts
- **Set contacts as marketing >** https://knowledge.hubspot.com/contacts/set-contacts-as-marketing
- **Set contacts as non-marketing >** https://knowledge.hubspot.com/contacts/set-contacts-as-non-marketing

Space for the training session video

Further links and trainings on the matter

- **How to create and use lists** > https://knowledge.hubspot.com/lists/create-active-or-static-lists
- **How to determine your list criteria** > https://knowledge.hubspot.com/lists/determine-your-list-criteria
- **How to export your lists** > https://knowledge.hubspot.com/lists/export-your-lists