

Segment and manage your contacts

Send the right message to the right audience
with contact segmentation!



Here's what we'll go over:

Want to get higher engagement with your emails? Start by segmenting your audience and sending more targeted content! This guide will go over all the ways you can manage and segment your contacts in Constant Contact.

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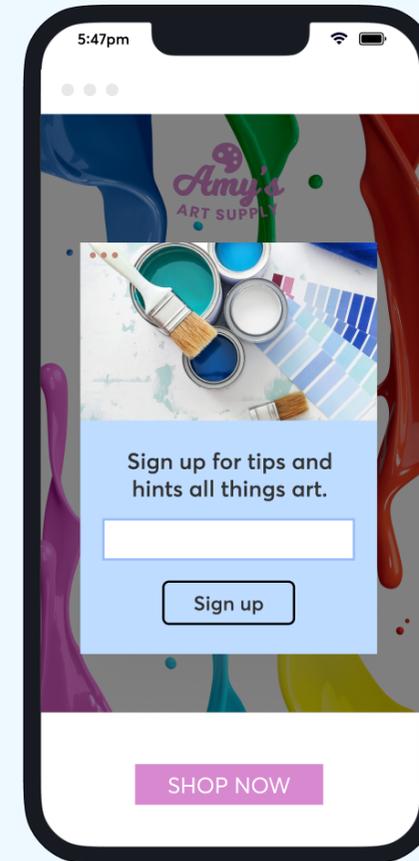


Understanding segmentation

Segmentation simply means dividing your contacts into smaller groups—or segments—based on shared characteristics or interests. It helps you get the right message to the right people at the right time.

The days of sending a giant, generic email blast to everyone on your list are long gone. Your contacts want to receive content that's relevant to them! When recipients continue to receive information they aren't interested in, they'll stop opening and reading your emails, or worse, they'll unsubscribe from your list completely.

Segmenting your contacts lets you customize your email content for each audience and send more targeted messages, resulting in higher open and click rates.



My email list	
<input checked="" type="checkbox"/>	Jeff Andrews
<input checked="" type="checkbox"/>	Talia Davis
<input checked="" type="checkbox"/>	Amanda Peters
<input checked="" type="checkbox"/>	Daphne Wallows
<input type="checkbox"/>	Elaine Adams
<input type="checkbox"/>	Dane Kipps



Creating lists, tags, and custom segments, as well as keeping a steady flow of new contacts coming in and organized with sign-up forms, are all key pieces to managing and segmenting your contacts!



Contact lists

[Creating lists](#) is the most basic way to segment your contacts into groups based on different characteristics that are relevant to your business. For example, you can create different lists of contacts based on their location, preferences on products or services, or if they've attended an event or volunteered with your organization before.

To get started:

1. Click **Contacts > Lists**.
2. Click **Create List**.

Once you've got your lists created, it's easy to [add](#) or [move existing contacts](#) to the appropriate lists and have new contacts automatically added to a specific list when they subscribe through one of your sign-up forms. You can also let your contacts choose which lists they want to be part of with the [Update Profile Form](#).

The screenshot shows the 'Contacts' section of a dashboard. At the top, there is a navigation bar with 'Home', 'Marketing', and 'Contacts' menus. A 'Create' button is visible. Below the navigation, a dropdown menu is open under 'Contacts', showing options: 'All contacts', 'Segments', 'Lists', 'Tags', and 'Add contacts'. The 'Lists' option is highlighted. Below the dropdown, there are tabs for 'Lists', 'Segments', and 'Tags'. The main content area features an 'Insights' section with four cards: 'Subscribed' (342), 'New subscribers (30 days)' (0), 'Subscriber growth (30 day)' (0%), and 'Unsubscribed' (0). Below the insights, there is a section for '11 Lists' with a search filter 'Filter by List name'. A table lists the following contact groups:

<input type="checkbox"/>	★	List name ↑	Contacts	Date created
<input type="checkbox"/>	☆	Bark in the Park	4	May 11, 2017
<input type="checkbox"/>	☆	Donors List	130	Feb 22, 2016
<input type="checkbox"/>	☆	Events & Fundraisers	12	Jul 20, 2018
<input type="checkbox"/>	☆	General Interest	315	Nov 11, 2019
<input type="checkbox"/>	☆	Grooming Services	110	Mar 30, 2017

Tags

[Tags](#) are labels that you can add to contacts to help group them together in ways that make sense to you. They can be applied to different contacts across multiple lists and when you go to send an email, you can choose to [exclude or send it only to the tagged contacts](#) on your selected lists.

To create a tag:

1. Click **Contacts > Tags**.
2. Click **Create Tag**.

Once you have tags created, you can [import a spreadsheet](#) of contacts with tags included to automatically apply them to specific contacts, or you can manually search for contacts and [apply the tag](#) to them.

The screenshot shows the HubSpot interface. At the top, there is a navigation bar with 'Home', 'Marketing', and 'Contacts' menus. A 'Create' button is visible. Below the navigation bar, the 'Contacts' section is active, showing a dropdown menu with options: 'All contacts', 'Segments', 'Lists', 'Tags', and 'Add contacts'. The 'Tags' option is highlighted. Below the dropdown, there are four insight cards: 'Subscribed' (342), 'New subscribers (30 days)' (0), 'Subscriber growth (30 day)' (0%), and 'Unsubscribed' (0). Below the insights, there is a section for '6 Tags' with a search filter 'Filter by Tag Name'. A table lists the tags:

<input type="checkbox"/>	Tag Name ↓	Contacts	Date Created
<input type="checkbox"/>	Dog Owner	3	Nov 16, 2023
<input type="checkbox"/>	Cat Owner	1	Nov 16, 2023



Did you know? When sending an email, you can choose a combination of lists and tags to reach the right audience with your message!

Custom segments

Whether you want to segment your contacts based on who opened a specific email or contacts who live in a certain state, the possibilities are endless! You're then able to [send an email to one of your segments](#) rather than to a list.

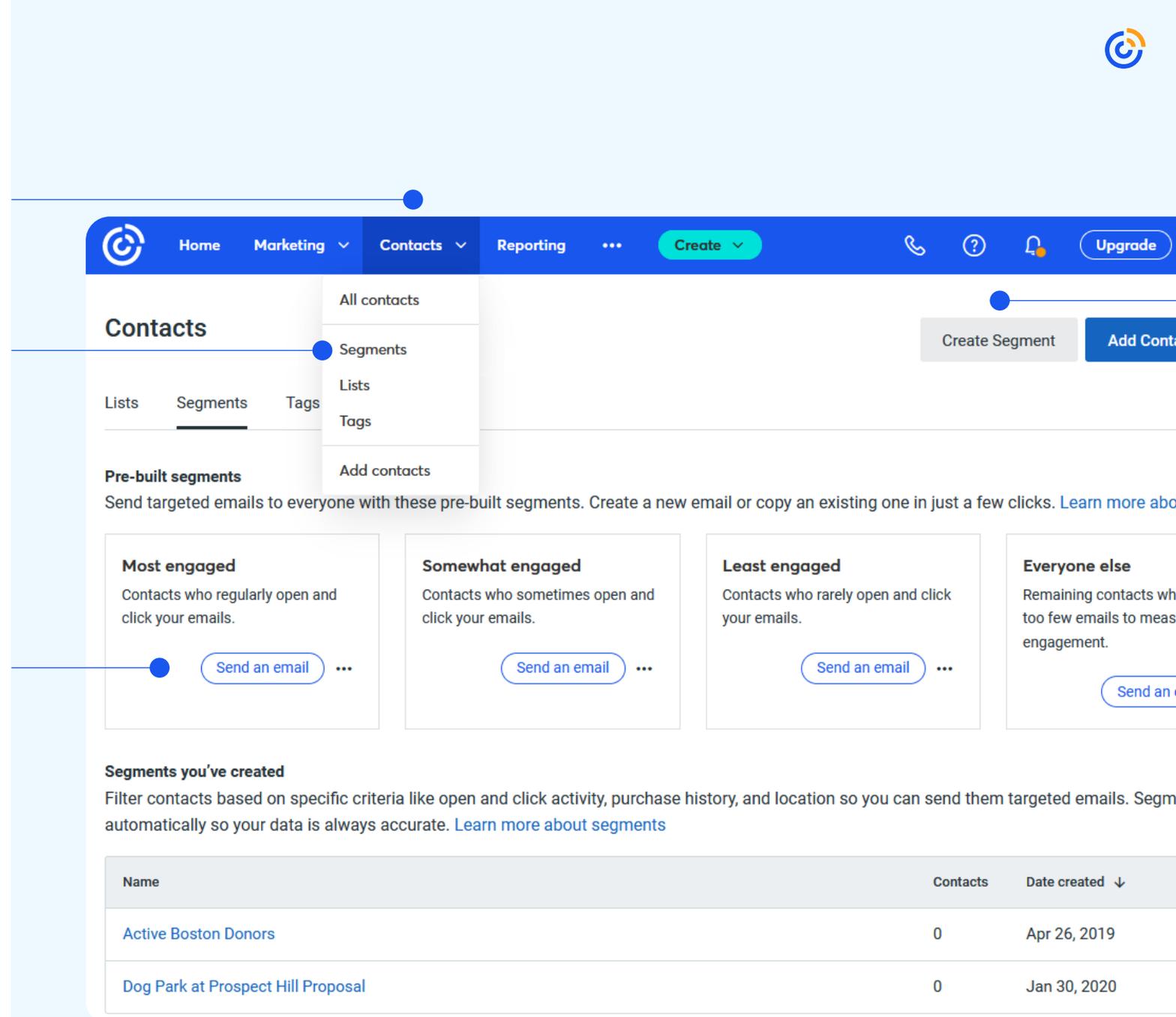
You can [create a segment](#) based on any combination of criteria:

- Their engagement with your emails
- The email lists they're currently on
- Any personal information you've collected
- Any tags you've added
- Their purchase activity

To create a segment:

1. Click **Contacts** > **Segments**.
2. Click **Create Segment**.

We also have pre-built segments so you can [target contacts based on their engagement](#) with your emails!



The screenshot shows the HubSpot CRM interface. The top navigation bar includes 'Home', 'Marketing', 'Contacts', and 'Reporting'. The 'Contacts' dropdown menu is open, showing options like 'All contacts', 'Segments', 'Lists', 'Tags', and 'Add contacts'. The 'Segments' option is selected. Below the menu, there are tabs for 'Lists', 'Segments', and 'Tags'. The main content area displays 'Pre-built segments' with four cards: 'Most engaged', 'Somewhat engaged', 'Least engaged', and 'Everyone else'. Each card has a description and a 'Send an email' button. Below this, there is a section for 'Segments you've created' with a table listing segments like 'Active Boston Donors' and 'Dog Park at Prospect Hill Proposal'.

Name	Contacts	Date created ↓
Active Boston Donors	0	Apr 26, 2019
Dog Park at Prospect Hill Proposal	0	Jan 30, 2020



Unlike lists, segments are dynamic, meaning contacts are automatically added as they meet the criteria and removed when they no longer do.

Click segmentation

[Click segmentation](#) is a great way to automatically segment your contacts based on the links they engage with in your emails. Enabling click segmentation is as easy as checking a box when inserting a link and selecting a list from the drop-down.

When your contacts click on the link in your email, they're automatically added to the list you chose!

The screenshot displays an email editor interface for a campaign titled "Adoption and Donation Drive". The main content area shows a teal patterned background with the text: "We are so glad to have you as an active member of our community. We're currently looking for volunteers for our upcoming dog and cat adopt-a-thon. To make this a success, we need your help!" Below the text is a button labeled "Sign up to volunteer".

On the left, a "Customize button" panel is visible, showing options for "Add link", "Button color" (teal), and "Button radius" (12). A blue dot on the "Add link" option is connected by a line to the "Insert Link" dialog box.

The "Insert Link" dialog box is open, showing the following fields and options:

- Text to display as link:** "Sign up to volunteer"
- Link URL:** "https://www.heartsandtailsanimalrescue.org/volunteer"
- Enable Click Segmentation**
Clicking on this link will add the contact to the specific list, helping you send more targeted emails.
[Learn more](#)
- Segmentation List:** "Volunteer Opportunities" (selected from a dropdown menu)
- [Create new list](#)
- Buttons:** "Cancel" and "Insert"



Sign-up forms

Contacts come and go, so it's important to keep a constant supply of new contacts coming in by setting up a [sign-up form](#). With our forms, you have the option to let contacts select which email lists they want to subscribe to, helping to keep your lists segmented as they grow! Click **Marketing** > **Sign-up forms** to begin.

[Inline sign-up forms](#) can be embedded on a specific page of your website, while [pop-up](#), [banner](#), and [flyout](#) sign-up forms catch your website visitors' attention and display when and where you want them to.

[Sign-up Landing Pages](#) can be shared on social media, in an ad, or anywhere online to capture new subscribers to a specific list.

[Facebook Lead Ads](#) let you target a specific audience and turn Facebook traffic into new subscribers.

The screenshot shows a marketing dashboard with a blue header. The navigation bar includes 'Home', 'Marketing', 'Contacts', and a 'Create' button. A dropdown menu is open under 'Marketing', listing 'All campaigns', 'Multi-channel campaigns', 'Calendar', 'Email', 'Automations', 'Events', 'Ads', 'Landing pages', 'Sign-up forms', and 'SMS'. The 'Sign-up forms' option is highlighted. A modal window titled 'Create sign-up form' is open, displaying several options with icons and descriptions:

- Pop-up**: Display a pop-up form that prompts visitors to sign up.
- Flyout**: This sign-up form slides onto the screen from the top, bottom, or side.
- Banner**: Add a banner sign-up form to the top or bottom of any page on your website.
- Inline**: Insert a form in the perfect spot on your site.
- Text to Join**: Set up Text to Join so contacts can easily join your email and SMS lists by text message. (US only)
- Sign-up Landing Page**: Sign-up forms where visitors can join your mailing lists, download content, or get offers.
- Facebook Lead Ads**: Create a Facebook ad to reach new audiences.



TIP

Create multiple sign-up forms and embed them on different pages of your site to attract different audiences!



More resources

By managing and segmenting your contacts, you'll be ready to send targeted emails to the right audience.

For even more how-to articles, video tutorials, and guides, visit our [Knowledge Base](#).

Articles

- [Using contact lists, tags, and segments based on your list size](#)
- [Segment your contacts through your sign-up form](#)
- [Keeping clean contact lists](#)

Video tutorials

- [Manage your contacts and lists](#)
- [Differences between lists, tags, and segments](#)
- [Create and manage tags](#)
- [Segment your contacts based on engagement](#)