

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.

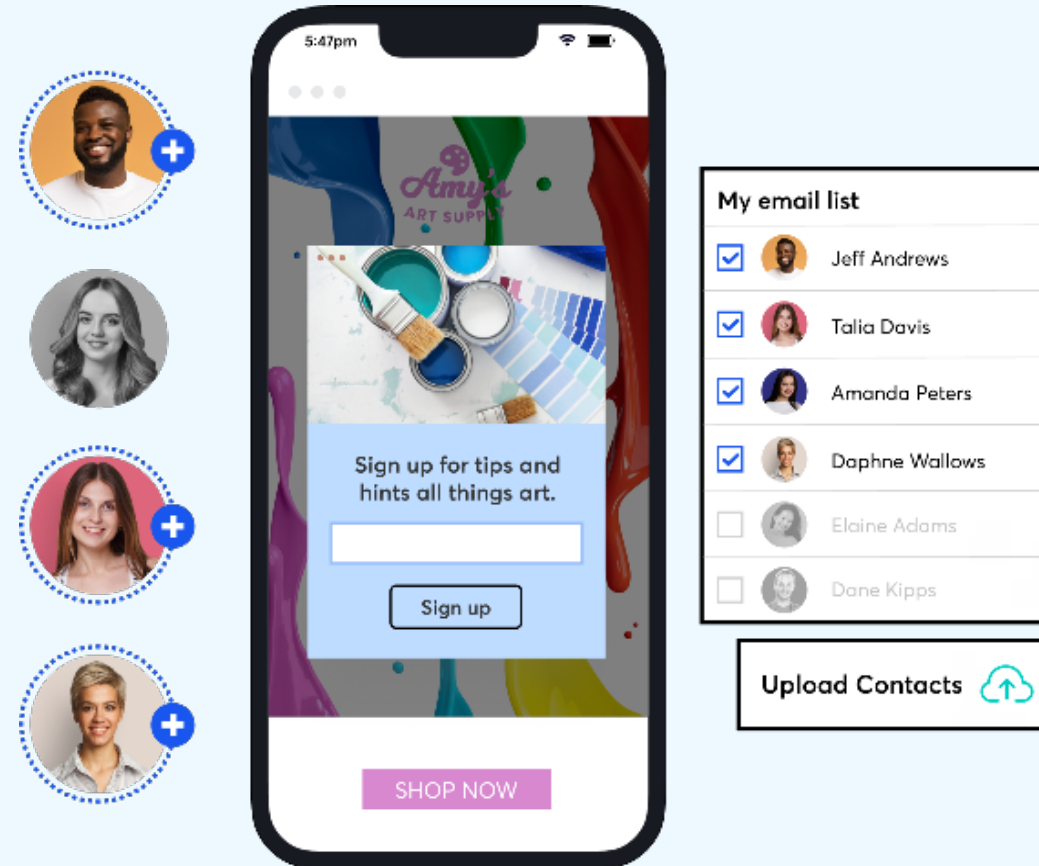
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Understanding segmentation

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.



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!

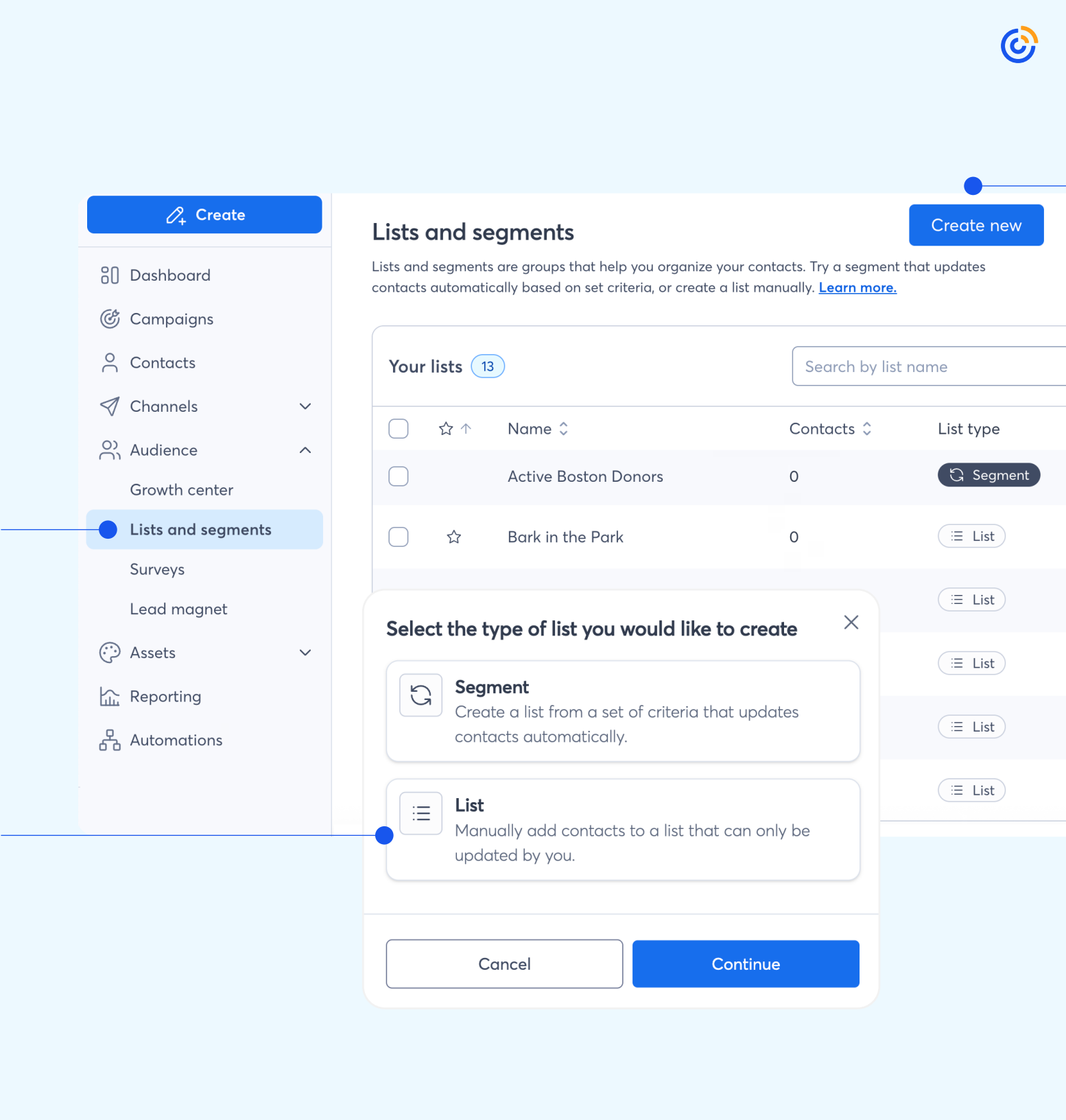
Contact lists

[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 **Audience > Lists and segments**.
2. Click **Create new**.
3. Select **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](#).



Custom segments

The possibilities for segmenting your contacts are endless! 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

You're then able to [send an email to one of your segments](#) rather than to a list.

To create a segment:

1. Click **Audience** > **Lists and segments**.
2. Click **Create new**.
3. Select **Segment**.

We also have pre-built segments to [target contacts based on their engagement](#)!

The screenshot shows the HubSpot interface. On the left, a sidebar contains navigation links: Dashboard, Campaigns, Contacts, Channels, Audience, Growth center, **Lists and segments** (highlighted), Surveys, Lead magnet, Assets, Reporting, and Automations. A blue dot is placed on the 'Lists and segments' link. The main content area is titled 'Lists and segments' and includes a 'Create new' button. Below the title is a description: 'Lists and segments are groups that help you organize your contacts. Try a segment that updates contacts automatically based on set criteria, or create a list manually. [Learn more.](#)'. A table titled 'Your lists' (with a count of 13) shows existing lists and segments. The table has columns for selection, star, name, contacts count, and list type. Two items are shown: 'Active Boston Donors' (0 contacts, Segment type) and 'Bark in the Park' (0 contacts, List type). A modal titled 'Select the type of list you would like to create' is open, showing two options: 'Segment' (with a refresh icon) and 'List' (with a list icon). The 'Segment' option is selected. The modal also includes 'Cancel' and 'Continue' buttons. A blue dot is placed on the 'Segment' option in the modal.

		Name	Contacts	List type
<input type="checkbox"/>	☆ ↑	Active Boston Donors	0	Segment
<input type="checkbox"/>	☆	Bark in the Park	0	List

Select the type of list you would like to create

☒ **Segment**
Create a list from a set of criteria that updates contacts automatically.

☐ **List**
Manually add contacts to a list that can only be updated by you.

CancelContinue



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

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. Go to the **Contacts** page.
2. Click the three dots and select **Manage tags**.
3. Click **Create new 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 displays the HubSpot interface. On the left is a sidebar with navigation options: Dashboard, Campaigns, **Contacts** (highlighted), Channels, Audience, Growth center, Lists and segments, and Surveys. A blue dot and line point from the 'Contacts' sidebar item to the 'Contacts' page header. The 'Contacts' page header includes a 'Create' button, a 'Name or email' search bar, and filters for 'New subscribers (30 days) 0 0%', 'Subscribed 342', and 'Unsubscribed'. Below the header is a table of contacts with columns for 'Contact' and 'Email address'. The first row shows 'Contact' and 'Email address'. The second row shows 'Chelsea King' and 'chelsea@heartsandtailsani...'. A blue dot and line point from the 'Manage tags' button in the top right of the contacts table to the 'Manage tags' modal. The 'Manage tags' modal is open, showing a '+ Create new tag' button and a list of tags. The list has a header 'All tags 6' and a search bar 'Search by tag name'. The tags listed are 'Name', 'Cat Owner', and 'Dog Owner'. Each tag has a checkbox, a name, a count, a date created, and a menu icon. The 'Name' tag has a count of 0 and a date of Nov 16, 2023. The 'Cat Owner' tag has a count of 0 and a date of Nov 16, 2023. The 'Dog Owner' tag has a count of 0 and a date of Nov 16, 2023. A blue dot and line point from the 'Create new tag' button to the 'Manage tags' modal. The modal also contains a description: 'Tags are simple labels used to help organize and filter your contacts.'



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

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!

Adoption and Donation Drive

SavedUndoRedoPreview & TestContinue

Button block

Add link

Text

Button

Hello {First Name}

We know that your cat loves the vet as much as you love bringing your cat to the vet, but it's booster shot time!

Schedule an appointment

We look forward to seeing you and your cat soon!

Insert link

Text to display as link (Required)

Sign up to volunteer

Read about link best practices.

Link URL (Required)

https://www.heartsandtailsanimalrescue.org/volunteer

Add dynamic variables

Enable click segmentation

Clicking on this link will add the contact to the specific list, helping you send more targeted emails.

Learn more

Volunteer Opportunities

Create list

Cancel

Insert

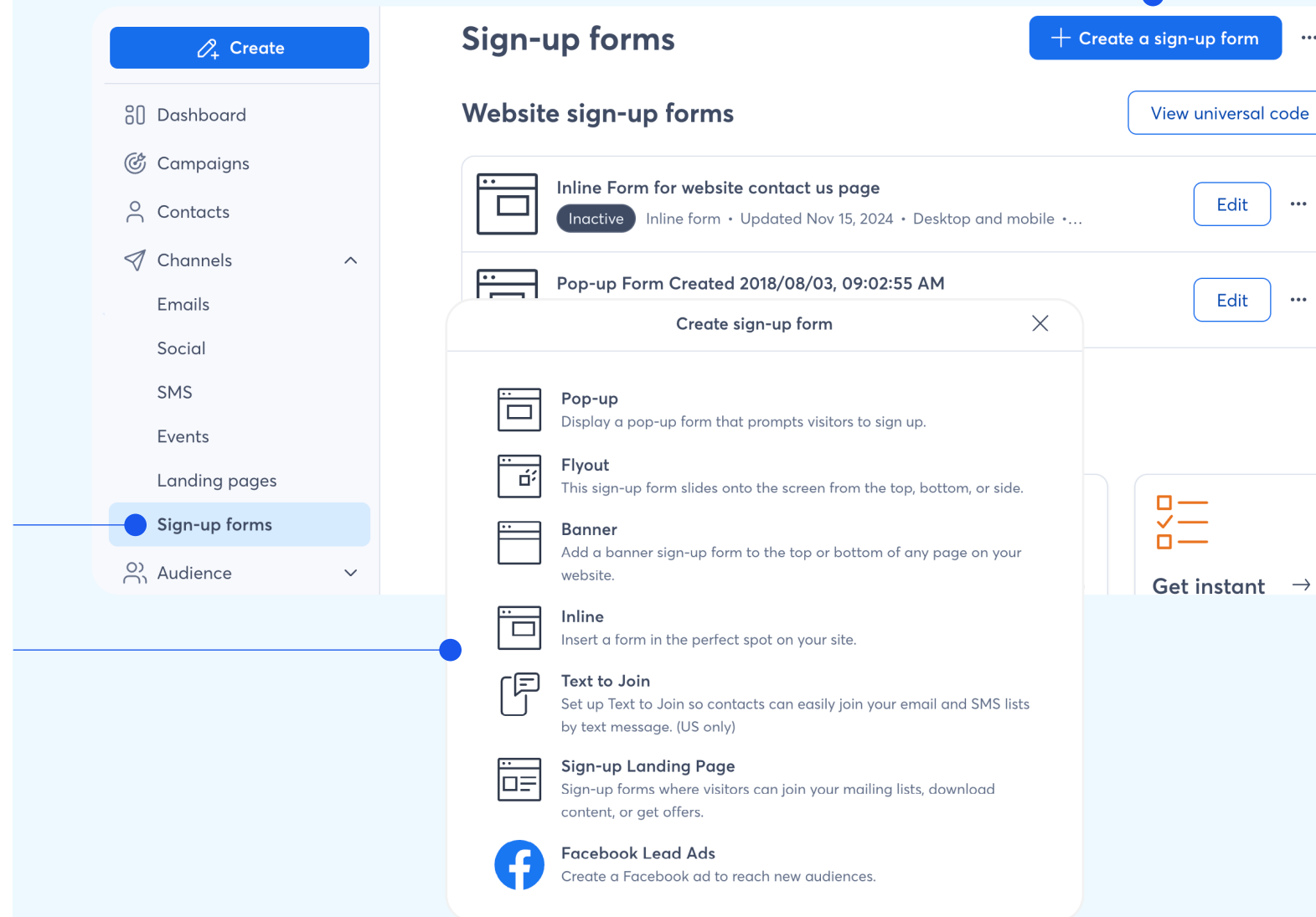
Sign-up forms

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 **Channels** > **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 dashboard interface for managing sign-up forms. On the left is a sidebar menu with options: Dashboard, Campaigns, Contacts, Channels, Emails, Social, SMS, Events, Landing pages, Sign-up forms (highlighted with a blue dot and a line pointing to the main content), and Audience. The main content area is titled 'Sign-up forms' and includes a '+ Create a sign-up form' button. Below this is a section for 'Website sign-up forms' with a 'View universal code' link. It lists existing forms: 'Inline Form for website contact us page' (Inactive, updated Nov 15, 2024) and 'Pop-up Form Created 2018/08/03, 09:02:55 AM'. A modal window titled 'Create sign-up form' is open, showing various form types: Pop-up, Flyout, Banner, Inline, Text to Join, Sign-up Landing Page, and Facebook Lead Ads, each with a brief description. On the right side of the dashboard, there is a 'Get instant' button with a right-pointing arrow.



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](#).

Was this guide helpful?

[Using the Contact Management Dashboard](#)

[Using contact lists, tags, and segments based on your list size](#)

[Segment your contacts through your sign-up form](#)

[Keeping clean contact lists](#)