



Sweet Success of Customer Segmentation



Rick Carlson
President & Founder
SharpSpring



Jeff Greer
CEO
Easyfish Marketing

Introductions



Rick Carlson

PRESIDENT/FOUNDER - **SharpSpring**

Rick started SharpSpring with the goal of bringing marketing analytics and automation tools to small and medium businesses on an affordable and easy-to-use SaaS platform.



Jeff Greer

CEO- **Easyfish Marketing**

Jeff Greer is a serial Internet technologies entrepreneur. He currently is the founder and CEO of Easyfish Marketing, a digital marketing agency based in Hickory, N.C. Jeff has built and sold four different Internet related businesses, including the largest privately held Internet Service Provider in the state of North Carolina. He has been an active Internet marketer since 1995. His areas of expertise include search engine marketing, mobile marketing and social media marketing.

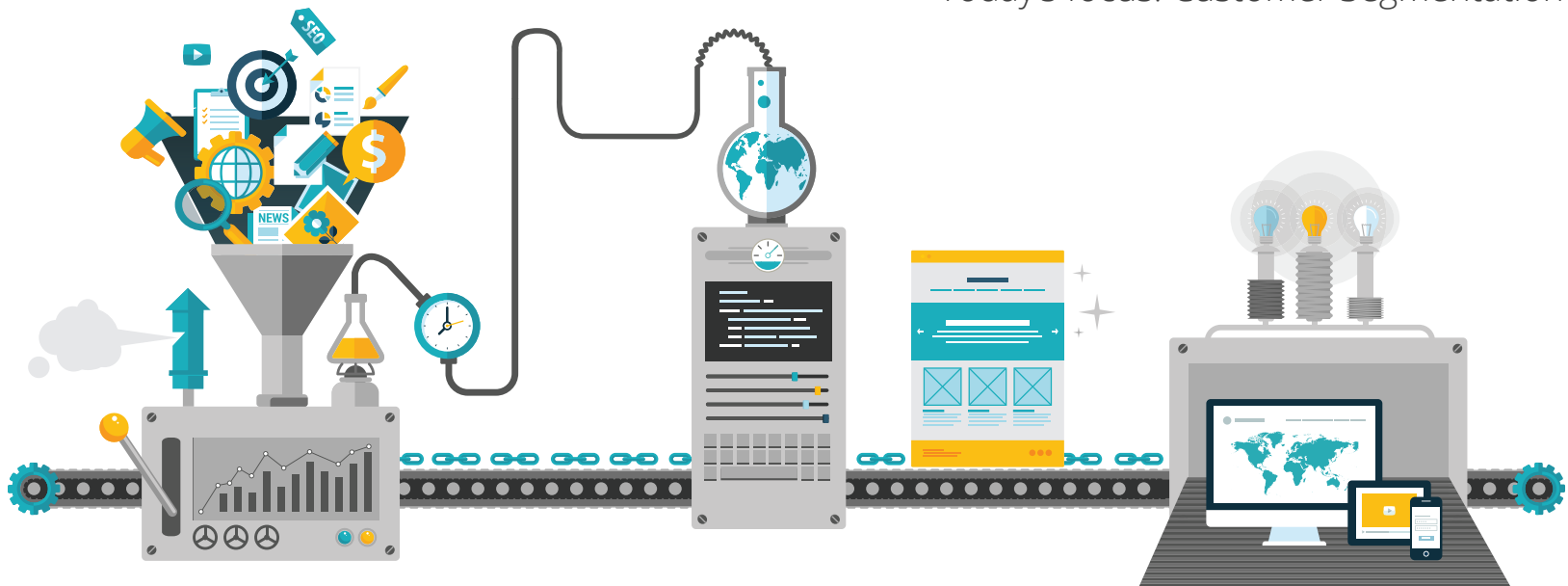
Greetings

Who's In The Audience

- SharpSpring Partner Agencies
- Agencies Considering SharpSpring
- Non-agency Marketing Professionals

Why Are We Here?

- Learning from Peers
 - Share marketing automation best practices
 - Provide real-world success stories
- Today's focus: Customer Segmentation



Housekeeping

Questions?

- Phone lines are muted
- Submit via:
 - Chat Box
 - Twitter: #SharpTweet or @SharpSpring
- Answers at end of presentation

Webinar Recording & Slides

- Emailed after webinar

Webinar Survey

- We need your feedback

Upcoming Webinars

6/17/15

Tracking And Converting Leads In Complex Sales Cycles

6/30/15

How To Price Your Digital Marketing Services

7/15/15

Helping Clients Make The Leap Into Marketing Automation

Future Partner Presenters:

Email Kim Jamerson at kim@sharpspring.com

Marketing Automation for Businesses



Drive More Leads

More than just more. Drive relevant leads that convert



Convert Leads to Sales

Close business by sending exactly the right message at exactly the right time using powerful, behavioral-based communication



Optimize Your Spend

Double down on what works and axe what doesn't. Comprehensive reports make it easy.

~400 agencies use SharpSpring

Click The Image To Find An Agency!



Marketing Automation for Agencies

Grow your agency. Increase your value.



Higher Value Relationships

Growing your agency by becoming an integrated and indispensable partner to your clients



Monthly Recurring Revenue

Move from unpredictable project work to retainer-based relationships



Prove Your Value To Your Clients

Show clients measurable results with comprehensive lead-to-revenue reporting

~400 Agency partners • 6 Continents • 23 Countries • 9 Languages

Featured Speaker



Jeff Greer

CEO

Easyfish Marketing

- 25 years in corporate and entrepreneurial marketing
 - Pfizer and Merck
 - Founder of an internet service provider, industrial technology company, and Easyfish Marketing
- Specialties: Search Engine Marketing, Conversation Rate Optimization, and Marketing Automation
- Easyfish Marketing:
 - Supports private and publicly held companies
 - Badged Google Partner company



Welcome To Today's Webinar

Data Integrity + Content Strategy + Marketing Automation = Conversions *

Marketing Automation Is
The Bees Knees!



HiveTracks
KNOW YOUR BEES





Welcome To Today's Webinar

Data Integrity + Content Strategy + Marketing Automation = Conversions *

Marketing Automation Is
The Bees Knees!



HiveTracks
KNOW YOUR BEES



“You missed a spot.”

Marketing Automation Recipe

Data integrity

+

Content strategy

+

Marketing automation

=

Conversions^x



Learning Goals

- How To Drive Segmented Data
- How To Measure Visitor Actions or Inactions
- How To Set Automation Triggers
- How To Increase Conversions





- Right person
- Right message
- Right time

“Tonight We’re Going To Market Like It’s 1999!”

Spray & Pray Marketing

- Treating All Visitors The Same
- Form Fill, Opened Email, Downloaded
- Read 6 Blog Articles
- Visited 5 Times in 6 Weeks
- Visited Pricing Page: Twice
- Signed Up Webinar vs. Form Fill



A rustic scene featuring a wooden background. In the foreground, there is a metal lantern with a glass globe and a wire cage, a wooden brush with yellow bristles, and a red-handled tool. To the right, a wooden frame holds a honeycomb structure. The lighting is warm and directional, creating strong shadows.

Hive Tracks Is Harnessing The
Power Of 10X Marketing To
Increase Conversions



- Collecting High Value Incremental Information
- Dynamic List Building & List Segmentation
- Communicating In A Highly Personalized Manner
- Performing One-To-One Messaging That Is Event Based & Action Oriented





James



Mark

- 145 Countries – 16,000 Subscribers
- Back Yard Hobbyist
- Bee Researchers
- Entomologists
- Food Scientists



✓ Save Hive

⊖ Reset Inputs

⏪ Save & Inspect

← Cancel

Number of Hives to Create:

Yard:

Hive Name:

Frame Count:

Component Type:

Bee Source:

Hive State:

Date Created: *month/day/year*

Description:

GPS: Lat: Lng:

Strength: %

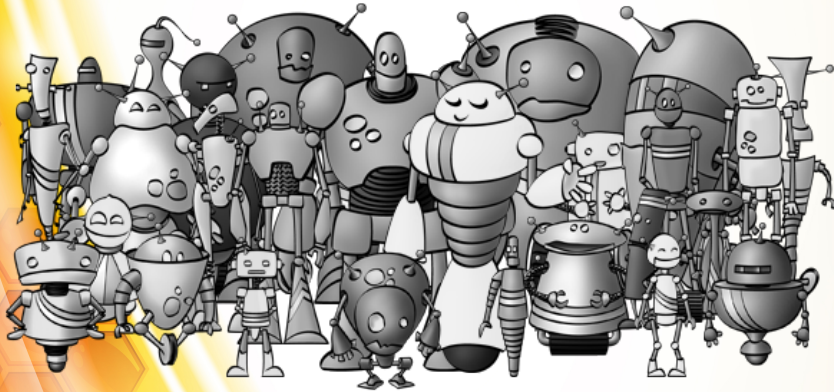


Includes a Queen



Edit Hive Components





- Onboarding Automation
- Tracker Automation
- Collector Automation
- Listener Automation
- Sentry Automation
- Kool-Aid Automation



- Settings
- MY ACCOUNT
 - Settings
 - IMAP Email Syncing
- MY COMPANY
 - Company Profile
 - User Accounts
 - Billing Info
- FEATURES
 - Custom Fields
 - Email Settings
 - Lead Scores
 - Pipeline Stages
 - Products
- TRACKING
 - Call Tracking
 - Dynamic Web Content
 - Dynamic Email Content
 - Shopping Carts

Hive Tracks

Tracking [+ New Page Rule](#)

- Add 15 points if a form is completed.
- Add 15 points for each email click.
- Add 5 points if a lead visits the page
- Add 5 points if a lead visits the page
- Add 5 points if a lead visits the page
- Add 5 points if a lead visits the page
- Add 5 points if a lead visits the page
- Add 5 points if a lead visits the page
- Add 25 points if a lead visits the page
- Add 25 points if a lead visits the page

Fit [+ New Fit Rule](#)

- Add 5 points when

Analytics Content Automation **Contacts** Sales VisitorID + New

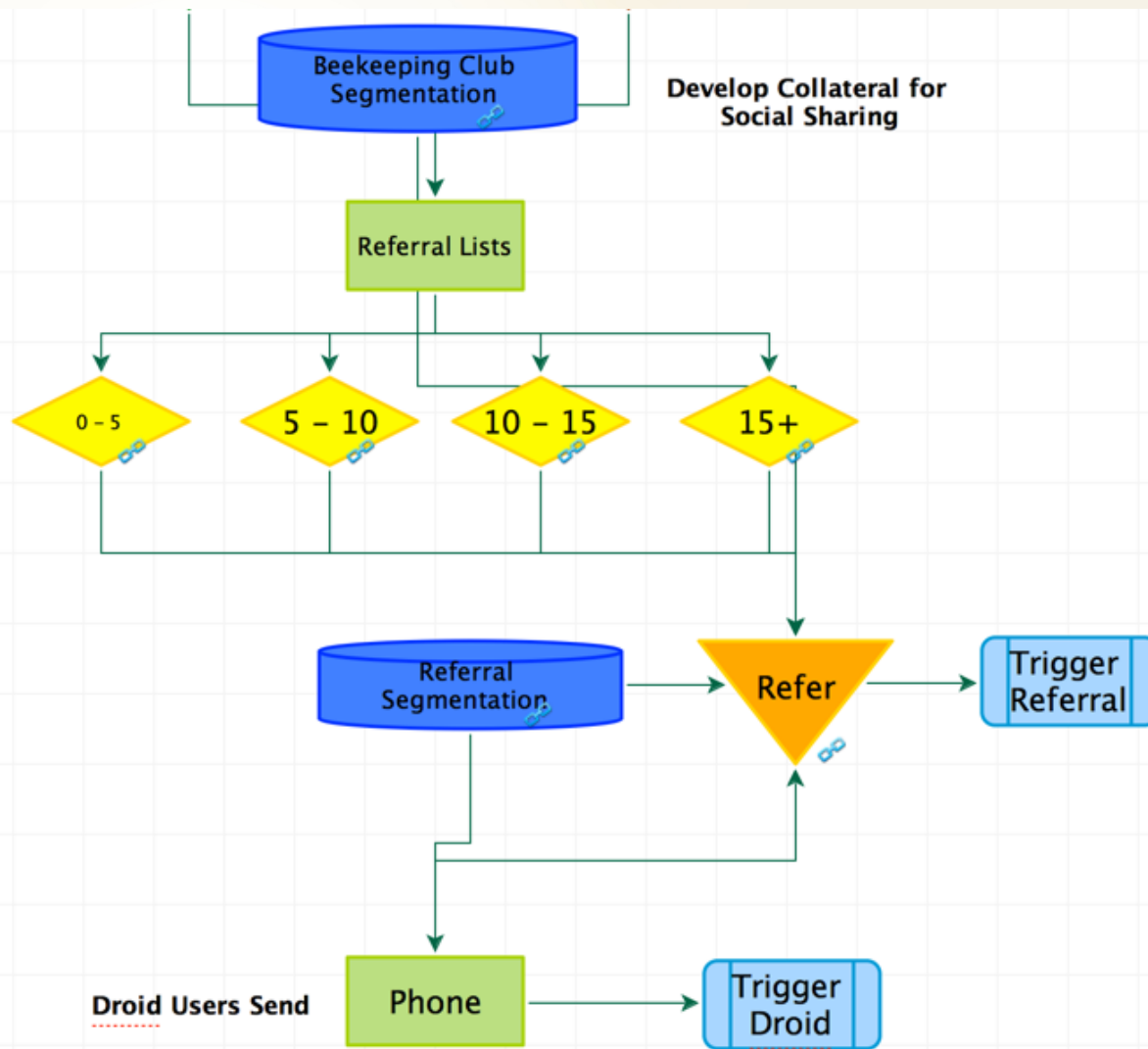
Contacts Hive Tracks

RECENTLY ACTIVE

- J
- C
- M
- M
- C
- S
- R
- S
- J
- N
- D

Add Contact

	[Redacted] [Redacted] Added 4 weeks ago	Direct Traffic	Unassigned	146 Lead Score	
	[Redacted] [Redacted] Added 6 weeks ago	Direct Traffic	Unassigned	143 Lead Score	
	JACOB DAVIS [Redacted] Added 5 weeks ago	Google Search	Unassigned	133 Lead Score	
	Paul Cotton [Redacted] Added 5 weeks ago	Direct Traffic	Unassigned	127 Lead Score	
	David Vest [Redacted] Added 2 days ago	Direct Traffic	Unassigned	126 Lead Score	
	[Redacted] [Redacted] Added 9 days ago	Direct Traffic	Unassigned	118 Lead Score	
	[Redacted] [Redacted]	Direct Traffic	Unassigned	118 Lead Score	





Message



What Type of Beekeeper Are You?

TestSender

Sent: Saturday, December 27, 2014 at 2:06 PM

To: Jeffrey Greer

Know Your Bees



What Type of Beekeeper Are You?

We are in the process of customizing our email communications for 2015 and want to make sure we only send you information that is of interest to you. We have a lot of exciting Hive Tracks features coming your way soon. Please take moment to answer a few short questions by simply clicking on the answer.

Question #1 - What Type of Beekeeper Are You?



← **What Type of Beekeeper Are You?**

TestSender

Sent: Saturday, December 27, 2014 at 2:06 PM

To: Jeffrey Greer

Question #1 - What Type of Beekeeper Are You?

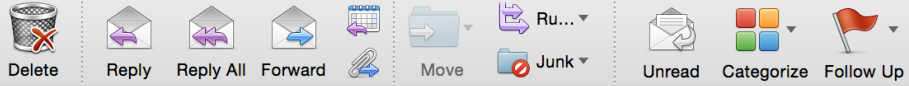


**I Am A Backyard
Beekeeper**

I Am A Sideliner



Message



What Type of Beekeeper Are You?

TestSender

Sent: Saturday, December 27, 2014 at 2:06 PM

To: Jeffrey Greer



**I Am A Sideliner
Beekeeper**



**I Am A Commercial
Beekeeper**



Message

Delete Reply Reply All Forward Move Junk Unread Categorize Follow Up

What Type of Beekeeper Are You?

TestSender

Sent: Saturday, December 27, 2014 at 2:06 PM

To: Jeffrey Greer



Connect With Us



Segmentation Plan



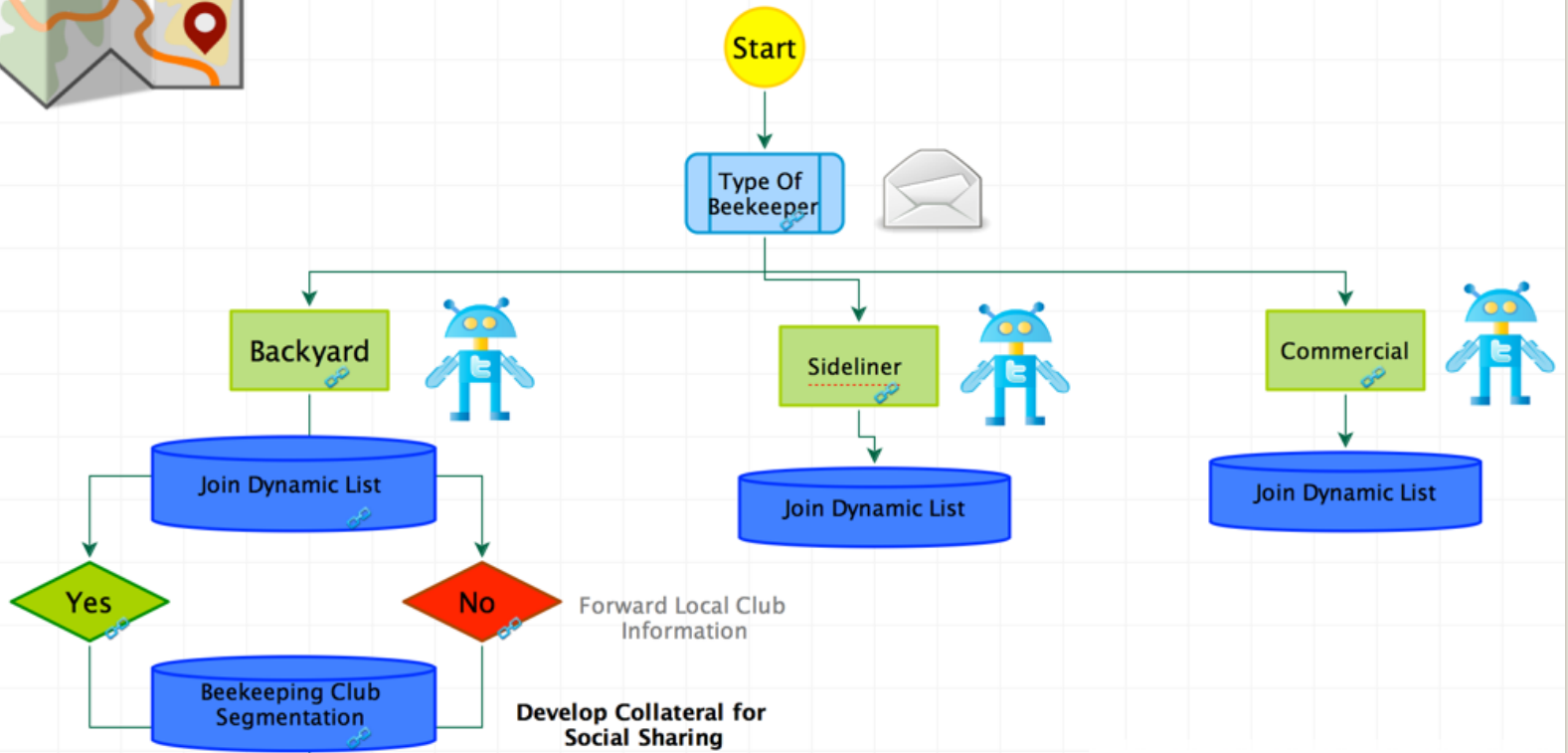
Landing Page

SharpSpring

Email

Decision

Merge



← **What Type of Beekeeper Are You?**

TestSender

Sent: Saturday, December 27, 2014 at 2:06 PM

To: Jeffrey Greer

Question #1 - What Type of Beekeeper Are You?



Are You A Member
Of A Local
Beekeeping Club
or Association?



Yes No



HiveTracks
KNOW YOUR BEES

Analytics Content Automation Contacts Sales VisitorID + New

Automation Hive Tracks

Backyard Beekeeper Workflow / Edit

Last changed by Jeff Greer 2014-12-26 22:29:01 ([View revision history...](#))

Automation Tasks

Filter Rules

MOST ACTIVE

- 0-5 Beekeepers Task
- 10-15 Beekeepers Task
- 15+ Beekeepers Task
- 5-10 Beekeeper Task
- Active Trial User Questi...
- Ask a Question Task
- Backyard Beekeeper Task
- Beekeeping For Dummie...
- Change Inactive Status T...
- Change Pro To Yes Post ...
- Commercial Beekeeper ...
- Droid Beekeepers Task
- Ecourse Forced Task

Workflow

Workflow Name

Backyard Beekeeper Workflow

Create a time-based workflow utilizing a custom field

Events

When and what should your workflow accomplish.

0 Minutes after start send the email

Enter email name Add Action

- just after start change lead field **Beekeeper Type** to value **Backyard Beekeeper**

Automation

Automation Tasks

Filter Rules

MOST ACTIVE

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- 5-10 Beekeeper Task
- Active Trial User Question Task
- Ask a Question Task
- Backyard Beekeeper Task
- Beekeeping For Dummies Task
- Change Inactive Status Task
- Change Pro To Yes Post Purch...
- Commercial Beekeeper Task
- Droid Beekeepers Task
- Ecourse Forced Task
- Engaged From Inactive Series
- Has Not Visited Onboard Pag...
- Has Not Visited Onboard Pag...
- Inactive To Active Series 2
- Inactive to Active Series 3

running. Only triggers can start a workflow. Triggers also act as filters when other triggers are fired.

Filters
Are used in combination with triggers, and are only tested when a trigger is fired.

Apply when any of the following conditions are met: RULE GROUP 1

Add the Trigger : When a contact fills out the form

Select a Form at any time Add Rule

Triggers

- When a contact went to the url <http://try.hivetracks.com/backyard-beekeeper/> 1 time or more referred by any url

Filters

Workflows & Actions

Add an existing workflow or create one.

Note: Only active workflows will be available to add to this task.

[Activate Workflows](#)

Add an existing workflow + New Workflow

- Backyard Beekeeper Workflow [View Workflow](#)
 - just after start change lead field **Beekeeper Type** to value **Backyard Beekeeper**



Automation Tasks

Filter Rules

MOST ACTIVE

- 0-5 Beekeepers Task
- 10-15 Beekeepers Task
- 15+ Beekeepers Task
- 5-10 Beekeeper Task
- Active Trial User Question Task
- Ask a Question Task
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- Commercial Beekeeper Task
- Droid Beekeepers Task
- Ecourse Forced Task
- Engaged From Inactive Series
- Has Not Visited Onboard Pag...
- Has Not Visited Onboard Pag...
- Inactive To Active Series 2
- Inactive to Active Series 3

Edit Tags

Backyard Beekeepers Type / Editing



Last changed by Jeff Greer 2015-01-28 20:17:13 (View revision history...)

List

RULES

Lists are great ways to keep in contact with your customers.

List Name

Backyard Beekeepers Type

Dynamic or Static

Should your list build over time? And should the rules be applied to all current leads?

- Dynamic List (New leads are automatically added as they meet the criteria)
 - Apply to the contacts already in your database
- Static List (build once)



When determining how to select your triggers and filters, consider what will trigger a lead to be added to the list in the future.

Analytics Content Automation Contacts Sales VisitorID + New

Automation Hive Tracks

Automation Tasks

Filter Rules

MOST ACTIVE

- 0-5 Beekeepers Task
- 10-15 Beekeepers Task
- 15+ Beekeepers Task
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- Commercial Beekeeper Task
- Droid Beekeepers Task
- Ecourse Forced Task
- Engaged From Inactive Series
- Has Not Visited Onboard Pag...
- Has Not Visited Onboard Pag...
- Inactive To Active Series 2

Triggers & Filters

Select your list criteria.

Group Options [+ New Group](#)

Apply **when any** of the following conditions are met: **RULE GROUP 1**

Add the Trigger : When a contact fills out the form


Select a Form at any time [Add Rule](#)

Triggers

1. When a contact went to the url <http://try.hivetracks.com/backyard-beekeeper/> 1 time or more referred by any url

Filters

[Save Changes](#)



Are You A Member
Of A Local
Beekeeping Club
or Association?



Yes No



HiveTracks
KNOW YOUR BEES

Okay, great! We have you listed as a member of a local beekeeping club or association. Next question...



On Average
How Many
Fellow
Beekeepers Do
You Know?

0 to 5

5 to 10

10 to 15

15+

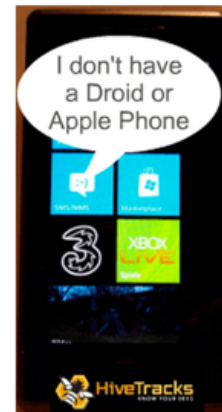


HiveTracks
KNOW YOUR BEES

Okay, thanks! We have you listed as knowing 10 to 15 fellow beekeepers.
Next question...



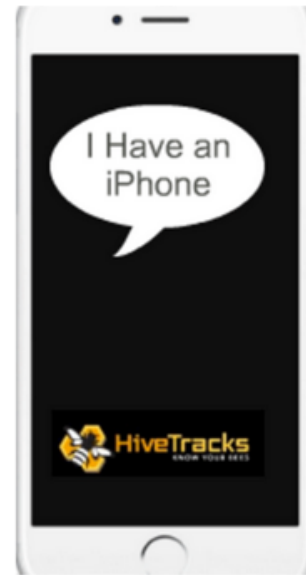
Do You Own a Smartphone?



HiveTracks
KNOW YOUR BEES

Okay, thanks! We have you listed as
owning an iPhone!

Thanks for
Participating in
Our Short
Survey!



HiveTracks
KNOW YOUR BEES



Lists

Filter Lists

ALL LISTS

- Master
- Commercial Prospects
- Inactive List
- Hive Tracks Pro Subscribers
- Pro Users
- Active List
- Delete Requested List
- Stay Active Requested
- iPhone List
- Member of a Beekeeping Club...
- 0 to 5 Beekeepers List
- 5 to 10 Beekeepers List
- 10 to 15 Beekeepers List
- 15+ Beekeepers List
- Commercial Beekeeper Type
- Sideliner Beekeeper Type
- Droid Phone List
- Backyard Beekeepers Type
- Member of Beekeeping Club ...
- Phone Other List
- Beekeeping For Dummies List

Miscellaneous

44 Lists

Master	Members	Settings
Commercial Prospects	Members	Settings
Inactive List	Members	Settings
Pro Users	Members	Settings
Active List	Members	Settings
Delete Requested List	Members	Settings
Stay Active Requested	Members	Settings
iPhone List	Members	Settings
Member of a Beekeeping Club Yes	Members	Settings
0 to 5 Beekeepers List	Members	Settings
5 to 10 Beekeepers List	Members	Settings
10 to 15 Beekeepers List	Members	Settings



Lists

Filter Lists

ALL LISTS

- Master
- Commercial Prospects
- Inactive List
- Hive Tracks Pro Subscribers
- Pro Users
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- Delete Requested List
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- 15+ Beekeepers List
- Commercial Beekeeper Type
- Sideliner Beekeeper Type
- Droid Phone List
- Backyard Beekeepers Type
- Member of Beekeeping Club ...
- Phone Other List

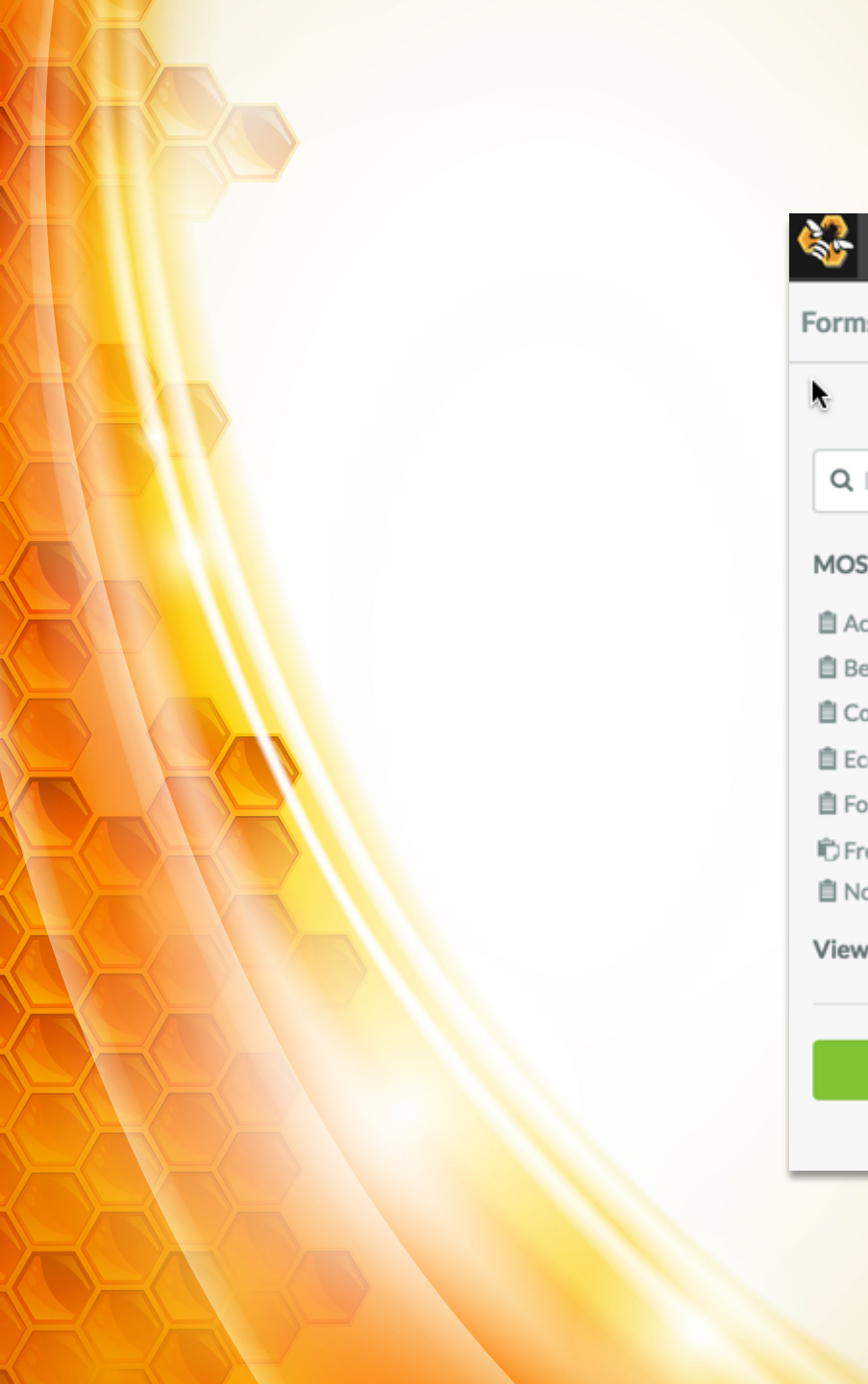
Commercial Beekeeper Survey Com..	Members	Settings
Free Trial New User List	Members	Settings
Free Trial Legacy Users List	Members	Settings
Has Not Created a Yard List	Members	Settings
Has Created a Yard List	Members	Settings
Has Not Created a Hive List	Members	Settings
Has Created a Hive List	Members	Settings
Hive Tracks Pro Subscribers	Members	Settings
\$\$ Goal Monthly List	Members	Settings
\$\$ Goal Annual List	Members	Settings
Account Creation Success	Members	Settings
On The Way List	Members	Settings
Not On The Way List	Members	Settings






An Idea Is Born!


- Club Edition
- IOS Mobile App
- Commercial Edition
- Referral Marketing
- Conversational Tone















 Analytics ▾

Forms  


 **Active Forms**



MOST ACTIVE 

-  Active Trial User Question
-  Beekeeping For Dummies Form
-  Commercial Beekeeper Survey
-  Ecourse Sign Up Form
-  Founders Club
-  Free Trial Sign Up Form 
-  Non-Active Trial User Question

View All

 + Add New Form



Congratulations

A 30-day Free Trial Awaits You. No Credit Card Required.



Zip Code / Post Code

United States

Password

Password Confirmation

Club Code (Optional)

By clicking here you agree to our [Terms of Service](#)

Sign Up

Already have a Hive Tracks account? [Sign in here](#) to skip this form.

Edit Tags

✉ Ecourse Sign Up / Editing

Last changed by Jeff Greer 2015-03-15 10:19:52 (View revision history...)

Options Save Changes



Send Settings

Subject

Hive Tracks Fast Start

From Name

Hive Tracks

From Email

james@hivetracks.com

Reply To

james@hivetracks.com

- Can send multiple times to one person
- Make Available in Contact Manager
- Send from lead owner when sending from automation engine



</>view code

Welcome To Hive Tracks!

We're delighted to have you on board! If you haven't signed up for our [Free Fast Start eCourse](#), now would be a great time! These short video tutorials will get you off to a [Fast Start](#) and help you get the most out of your Hive Tracks account.

Thank you again for giving Hive Tracks a try. If you have any questions, please don't hesitate to reach out to us by emailing support@hivetracks.com.

Sincerely,

The Hive Tracks Team

FAST

Analytics Content Automation Contacts Sales VisitorID + New ?

Hive Tracks ☎ 📌

Edit Tags

✉ 10 Day Hive Boost / Editing

Last changed by Jeff Greer 2015-03-17 11:57:40 (View revision history...)

Options Save Changes

✉ 📅 📧 ✍ ...

Send Settings

Subject


From Name

From Email

Reply To

- Can send multiple times to one person ⓘ
- Make Available in Contact Manager
- Send from lead owner when sending from

</> view code




Have You Created Your First Hive?

Dear (\$firstname),

Here's a quick [link](#) that shows you how to [set up a hive](#). If you have not had the chance, it's a quick and easy task. We hope you are enjoying Hive Tracks!

Sincerely,

The Hive Tracks Team



Analytics Content Automation Contacts Sales VisitorID + New HiveTracks

Edit Tags Progress Check / Editing Last changed by Jeff Greer 2015-03-15 15:25:18 (View revision history...) Options Save Changes

Send Settings

Subject


From Name

From Email

Reply To

Can send multiple times to one person !

Make Available in Contact Manager



HiveTracks

KNOW YOUR BEES

</> view code

Just Checking In!

Dear {Firstname},

We hope you're enjoying Hive Tracks. Please take a moment and let us know how your Free Trial is going by clicking the link below that best describes you.

[I have started the trial and I am actively learning how to use the software.](#)

[I have not had the chance yet to properly set-up my account.](#)

Thank you again for giving Hive Tracks a try. If you have any questions, please don't hesitate to email us at support@hivetricks.com.

Sincerely,

The Hive Tracks Team

ew

Life of the Lead 42

Memberships 11


Lead Score 309

Tracking Devices 1

Event Filter ▾

Track

s ago



Form Completed

filled out the form [Free Trial Sign Up Form](#).

[View Form Data](#)

Message

Delete
 Reply
 Reply All
 Forward
 Move
 Ru...
 Junk
 Unread
 Categorize
 Follow Up

Thanks for Subscribing

support@hivetracks.com sent by bounce+ctw8awb8vljh@return.recurly.com

Sent: Tuesday, May 19, 2015 at 9:09 PM

To: [redacted]

Invoice 1261 May 20, 2015

[redacted]

Your subscription confirmation

Thank you for subscribing!

Your subscription started at May 20, 2015. It is now active and will be automatically renewed on May 20, 2016.

Your credit card was billed \$59.99.

[View your invoice online.](#)

Your plan:
Yearly Hive Tracks (\$59.99)
 Next invoice date:
May 20, 2016

Date	Description	Amount
May 20, 2015 — May 20, 2016	Yearly Hive Tracks	\$59.99
	Subtotal:	\$59.99
	Paid:	\$59.99
	Total:	\$0.00

Thank You.



HiveTracks
KNOW YOUR BEES

Continue The Conversation...

Follow Up with SharpSpring:

Questions?

Email sharpspring@sharpspring.com

Want to see more?

Request a demo on www.sharpspring.com

SharpSpring Partners:

Got a great success story?

Email ideas to kim@sharpspring.com

Follow up with Jeff:



Jeff Greer

CEO

EasyFish Marketing

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jeffg@easyfishmarketing.com

www.easyfishmarketing.com

www.twitter.com/easyfishtweets



Questions?

Thank You.



SharpSpring