ORACLE
Marketing Consulting

An Oracle Consulting Checklist

Segmentation & Personalization Ideas to Explore

Checklists can inspire you, help you identify gaps, allow you to take inventory, and provide an easy-to-follow action plan. At Oracle Marketing Consulting, we use checklists all the time with our clients. In fact, we love them so much that we wanted to share some of our most useful checklists, including this one about audience segmentation and personalization ideas.

Relevancy is core to delivering value to digital marketing subscribers, and segmentation and personalization are two of the major strategies for creating it. Here's a list of more than 170 attributes you can use to either send a segmented campaign or personalize a campaign.

These attributes fall into seven different kinds of information:

1. Demographic
2. Firmographic
3. Technographic
4. Geographic
5. Psychographic
6. Behavioral
7. Social Influence

You will likely have even more attributes available to you as tags in your customer relationship management (CRM) platform or customer data platform (CDP). Also keep in mind that most of these attributes can be used to personalize landing pages as well, so you can create a cohesive experience throughout the funnel and across channels.

We hope this checklist inspires you to send more segmented and personalized digital marketing campaigns so you can achieve the performance you're looking for. And, of course, if you'd like assistance, we're always here to help. Just talk to your Oracle account manager, **visit us online**, or reach out to us at **CXMconsulting_ww@Oracle.com**.

Kaiti Gary

Sr. Director of Analytic & Strategic Services,

Oracle Marketing Consulting

Tips for using this checklist

✓ **Check off** the segmentation and personalization attributes you already have access to and use.

☆ **Star** the attributes you consider must-haves for the future.

○ **Circle** the attributes you consider nice-to-haves for the future.

— **Strike through** the attributes that aren't appropriate for your business.

Demographic Attributes

Information about **who** the subscriber is and the people around them, including:

Who They Are

- [ ] First name
- [ ] Last name
- [ ] Middle name or initial
- [ ] Race/ethnicity
- [ ] Language(s) spoken
- [ ] Gender identity
- [ ] Birthday
- [ ] Age
- [ ] Life stage (e.g., student, empty nester)
- [ ] Generation (e.g., Gen Z, Millennial, Gen X, Boomer)
- [ ] Education level
- [ ] Profession or retired
- [ ] Employer
- [ ] Professional title
- [ ] Organizational role or area of focus
- [ ] Commercial/professional user of your product or service or do-it-yourselfer (DIYer)
- [ ] Income level
- [ ] Net worth
- [ ] Credit scores
- [ ] Renter or owner of one or more homes
- [ ] Lessee or owner of car, motorcycle, RV, ATV, boat, etc.

- [ ] Active or former military
- [ ] Sexual orientation
- [ ] Marital status
- [ ] Pregnancy status or due date
- [ ] Family size
- [ ] Chronic health conditions (e.g., allergies, arthritis)
- [ ] Mental conditions (e.g., depression, bipolar)
- [ ] Developmental conditions (e.g., autism, ADHD)
- [ ] Genetic conditions (e.g., sickle cell anemia, Down syndrome)
- [ ] Social media handles
- [ ] Player names, game avatars, etc.

"As you scroll through this slightly overwhelming list, focus in on the most useful attributes to your brand and then create personas based on your customer types with similar attribute profiles. Personas enable you to target smarter and more efficiently, create more relevant messaging, and develop more meaningful connections with your customers."

Ana Jablonski
Director of Analytic & Strategic Services,
Oracle Marketing Consulting

"Consider an audit of current profile and existing data tables to catalog current data availability as well as gaps. Identify short-term opportunities for quick implementation, as well as the data sources and steps needed to fill the gaps as part of your strategic roadmap."

JT Capps
Strategic Director of Analytic
& Strategic Services,
Oracle Marketing Consulting

Who They Care About

The names, ages, birthdays, anniversaries, and other information about their:

- ☐ Spouse or partner
- ☐ Children
- ☐ Parents
- ☐ Grandparents and other relatives
- ☐ Pets
- ☐ Friends
- ☐ Boss or manager
- ☐ Business partners
- ☐ Co-workers
- ☐ Professional associates and acquaintances

"Be critical about what data you collect and how you use it. It may sound impressive to personalize by three different variables and multiple axes, but what does it do to the subscriber experience? Does it fragment and muddy it, or does it connect and enrich it? More isn't always better."

Jessica Stamer
Consulting Technical Manager for Eloqua,
Oracle Marketing Consulting

"Job titles today are all over the place, but they're often used interchangeably with job role and function when they shouldn't be. Having marketing and sales alignment on this marketing attribute can help differentiate your personas so your business is aligned on who you truly want to target."

Kaitlin Reno
Senior B2B Consultant for Eloqua,
Oracle Marketing Consulting

"Individual attributes are not always meaningful when taken by themselves. A person with high income, net worth, or credit score at a younger age may have a very different buyer mindset than someone scoring high in those categories nearing retirement. Clients should define audiences using a combination of demographic attributes that align with a targeted variable such as engagement or purchase behavior."

Patrick Maxwell
Senior Director of Solution Architecture,
Oracle Marketing Consulting

"To avoid violating the Privacy Rule of the Health Insurance Portability and Accountability Act (HIPAA), be extra careful about how you collect and use information about health conditions. Consumers should be in control of this information, and brands should consider messaging about conditions that doesn't identify the subscriber as having it."

Peggy Sehorn
Expert Consultant Technical Manager,
Oracle Marketing Consulting
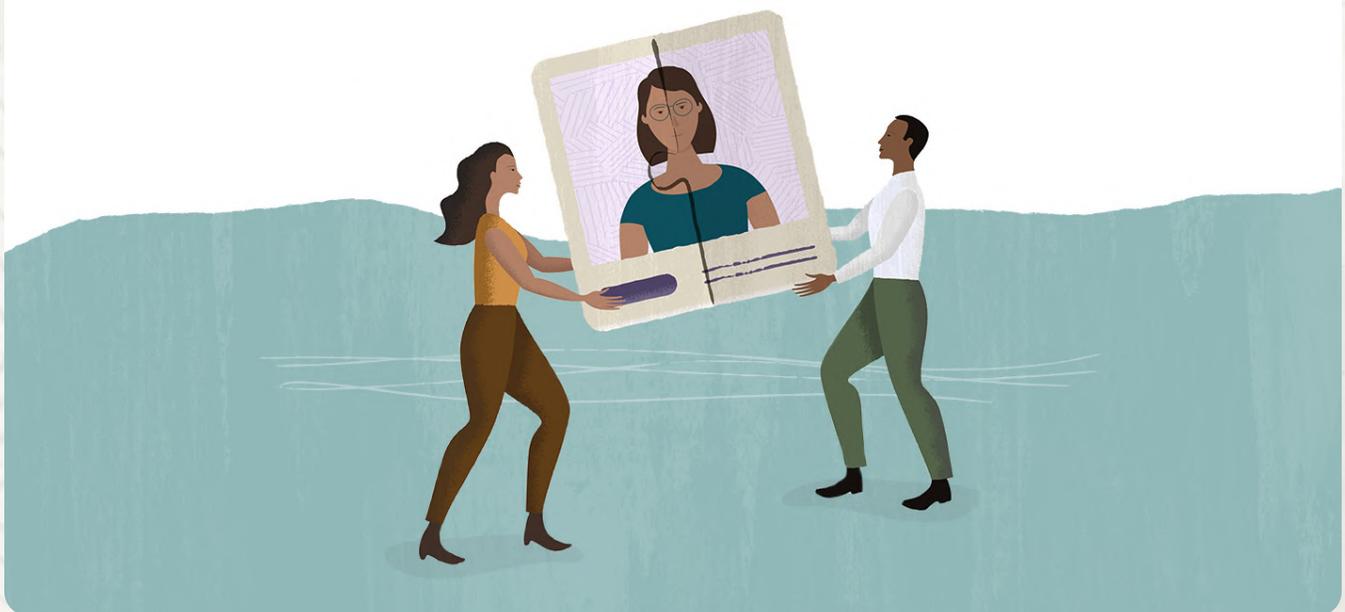
Firmographic Attributes

Information about **the organization** the subscriber works for, including:

- ☐ Organization name
- ☐ Location of headquarters and branches
- ☐ Industry
- ☐ States or countries of operation
- ☐ Annual revenue
- ☐ Scale of operations (e.g., number of employees, office or warehouse square footage, fleet size, annual advertising spend, annual travel budget)
- ☐ Organization's relationship with your brand (e.g., prospect, current customer, previous customer, competitor's customer)

"Organizational data can help marketers prioritize contacts at key accounts. When deciding who to include in a high-value offer, look to named or target accounts, industries of interest, or regions that are ripe for expansion."

Laura Marty
Consulting Technical Manager for Eloqua,
Oracle Marketing Consulting
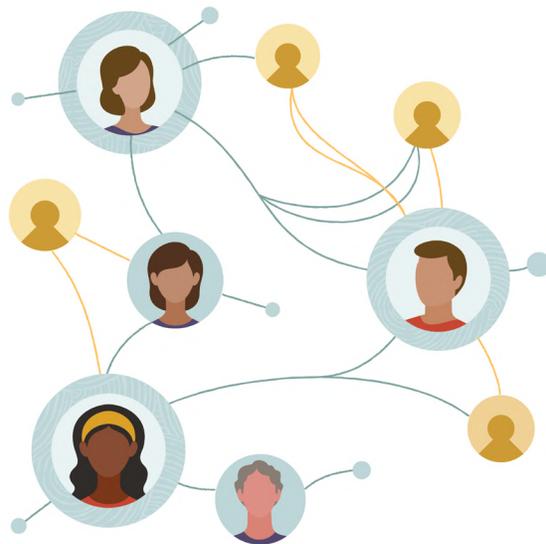
Need help targeting your campaigns in Oracle Eloqua?
Oracle Marketing Consulting has a team of B2B and Eloqua experts that can help you improve the relevance and effectiveness of your campaigns.

Talk to your Oracle account manager, **visit us online**, or reach out to us directly at **CXMconsulting_ww@Oracle.com**.

Technographic Attributes

Information about **the technology** owned or used by the subscriber or the organization the subscriber works for, including:

- ☐ Email inbox app or website and browser used
- ☐ Operating system of mobile phone, desktop, laptop, tablet, etc.
- ☐ Device or equipment used
- ☐ Purchase date or age of device or equipment used
- ☐ Mobile service carrier
- ☐ Internet service provider
- ☐ Tech stack components (on premise or cloud-based) used by organization

*"Understanding how and where your audience views your messages plays a large role in content development decisions. For example, only certain email environments like Apple Mail support CSS-based kinetic interactive elements. If your audience has low usage of Apple Mail, using these techniques would not be recommended. How **animated GIFs** are displayed, **dark mode rendering**, support of hosted fonts, message clipping, and much more also vary across inboxes."*

Nick Cantu
Associate Creative Director for Creative Services, Oracle Marketing Consulting
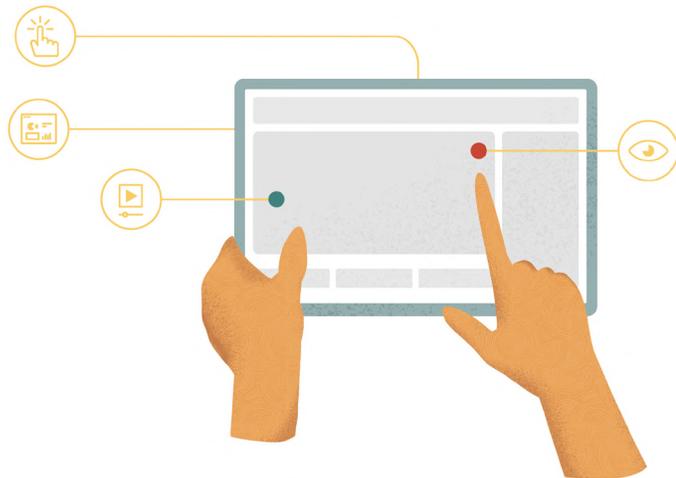
Need help creating emails that render and function well in all the inboxes your subscribers are using most? Oracle Marketing Consulting's Creative Services and Coding teams can help you understand what kinds of experiences are supported among your audience and then create them for you.

Talk to your Oracle account manager, **visit us online**, or reach out to us directly at **CXMconsulting_ww@Oracle.com**.

Geographic Attributes

Information about *where* the subscriber is, including:

Location of Primary Home, Office, Vacation Home, etc.

- ☐ Zip code
- ☐ Neighborhood
- ☐ City or town
- ☐ County
- ☐ State
- ☐ Region (e.g., New England, Mexican Riviera)
- ☐ Country
- ☐ Community type (e.g., urban, suburban, exurban, or rural)
- ☐ Language(s) spoken there

Climate

- ☐ Local weather, both current and forecasted
- ☐ Monthly average temperatures and humidity
- ☐ Monthly average rainfall and snowfall

Physical Proximity to...

- ☐ Local store, restaurant, or service location
- ☐ Natural attractions (e.g., national parks, rivers, skiing venues)
- ☐ Commercial attractions (e.g., concert venues, conference centers, theaters)
- ☐ Delivery or service area (e.g., same-day delivery)

Device Location

- ☐ IP address location (note: may only be accurate to state or region)
- ☐ Passing through a geofence or near a beacon
- ☐ Logged onto brand-provided wifi network

*"Lots of our clients want to leverage location based on device data, but **Mail Privacy Protection** is changing the game, making that data unreliable. Location information is still high-value, but now the best way to get it is through preference center campaigns where you ask subscribers to identify their preferred location, whether it's near their home, work, or elsewhere."*

Kaitlin Reno
Senior B2B Consultant for Eloqua,
Oracle Marketing Consulting

"Zip code data is just as useful for suppression as it is for targeting. For example, we have clients who suppress overdue bill reminders and cross-sell campaigns to customers who reside in recently declared disaster zones to avoid being insensitive. An offer not being available to subscribers because of legal restrictions is another reason to use suppression."

Clint Kaiser
Head of Analytic & Strategic Services,
Oracle Marketing Consulting

"Location-based personalization can be very rewarding, but it can also be cumbersome to configure and maintain. For example, weigh the complexity vs. payoff of personalizing based on zip code versus something broader like region. Create meaningful variations in content, but prioritize ease of execution."

Jessica Stamer
Consulting Technical Manager for Eloqua,
Oracle Marketing Consulting

Psychographic Attributes

Data about **why** the subscriber does things, including:

Activities & Interests

- ☐ Food preferences

- ☐ Fashion preferences

- ☐ Genre preferences for TV shows, movies, books, music, video games, etc.

- ☐ Favorite entertainers (e.g., bands, actors, sports teams, athletes, authors, podcasters, comedians)

- ☐ Hobbies (e.g., gardening, sewing, video games, sports)

- ☐ Favorite travel destinations (e.g., Las Vegas, Europe), locales (e.g., beaches, national parks), activities (e.g., skiing, snorkeling), modes of travel (e.g., RV, cruise), etc.

- ☐ High school, college, or grad school alma mater

Attitudes & Values

- ☐ Political affiliation and voting record

- ☐ Support for or opposition to women's rights, gun rights, LGBTQ rights, religious rights, worker's rights, etc.

- ☐ Support for or opposition to various charities, nonprofits, organizations, etc.

- ☐ Support for or opposition to various religions, spirituality, atheism, etc.

- ☐ Support for or opposition to various countries, wars, etc.

"Psychographics tend to change slowly, but seachanges do happen. Natural disasters, job changes, the birth of children, injuries, and other events can change lives, behaviors, and attitudes quickly and dramatically. Marketers should be on the lookout for such shifts, especially when there are national or global shocks, such as the COVID-19 pandemic or the Great Resignation."

Chad S. White
Head of Research,
Oracle Marketing Consulting

"Using design thinking is a great way to identify what matters most to your customer segments. It will help you identify what each group is saying, doing, thinking, and feeling, which ultimately helps identify their biggest need. Also, by looking at things holistically, brands can identify when certain segments can be combined because of similarities in mindset."

Jonathan McClure
Director of Analytic & Strategic Services,
Oracle Marketing Consulting

Lifestyle & Social Status

- [ ] Propensity to eat out vs. cook in
- [ ] Physical activity level
- [ ] Affinity for luxury goods vs. bargain goods
- [ ] Affinity for brand labels vs. private label goods
- [ ] Propensity to travel first class, business class, coach class, etc.
- [ ] Social status (e.g., working class, lower middle class, upper middle class, upper class)

"While more qualitative in nature than other attributes, psychographics frame up the motivation for people to do something—or not do something. In the depths of marketing planning, it's easy to lose sight of the fact that every consumer/traveler/ viewer/shopper is a human. We're complex beings and motivation is a powerful dimension to driving our behavior."

Clint Kaiser
Head of Analytic & Strategic Services,
Oracle Marketing Consulting

Need help extracting the insights you need from your customer data?
Oracle Marketing Consulting's Analytic & Strategic Services team can help you understand your audience better so you can deliver relevant campaigns to them.

Talk to your Oracle account manager, **visit us online**, or reach out to us directly at **CXMconsulting_ww@Oracle.com**.

Behavioral Attributes

Data about what the subscriber **has done**, including:

Marketing Channels They've Opted Into or Joined

- ☐ Opted in for promotional emails
- ☐ Opted in for promotional SMS messages
- ☐ Have installed mobile app
- ☐ Joined loyalty program
- ☐ Opted in for mobile push
- ☐ Opted in for browser push
- ☐ Requested direct mail, catalog, etc.
- ☐ Follow on Facebook, Instagram, Twitter, etc.

Source Through Which They Opted in

- ☐ During checkout or registration
- ☐ In store, at event, etc.
- ☐ Via webinar registration page, report download form, or another lead-generation form
- ☐ On website or in app
- ☐ Via social media page
- ☐ During sweepstakes or contest entry

Buyer Readiness

- ☐ Lead score
- ☐ Is a marketing qualified lead (MQL)
- ☐ Is a sales qualified lead (SQL)

What They've Subscribed to

As well as the level or type of plan they have (e.g., ad-supported, family, premium)

- ☐ Streaming service memberships (e.g., TV, music)
- ☐ Video game and metaverse memberships
- ☐ News provider memberships
- ☐ Monthly product subscriptions (e.g., clothes, pet food)
- ☐ Insurance or protection plans for products, travel, etc.

What Balances They Have

- ☐ Account balance
- ☐ Loyalty point balance
- ☐ Private label credit card account balance

What They've Purchased

- ☐ Previous or repeat purchases of physical goods, digital goods (including NFTs), and services
- ☐ Previous or repeat attendee of event
- ☐ Previous or repeat visits to destination

"Your contacts' tendencies tell you much more than what they say they're into. They also give you clues as to what they might be interested in. Use behavioral preferences to identify cross-sell opportunities, or exclude subscribers who have a clear disinterest in certain topics."

Laura Marty
Consulting Technical Manager for Eloqua,
Oracle Marketing Consulting

Engagement & Shopping Behaviors

- ☐ Pages they've browsed
- ☐ Site search terms used
- ☐ Level of engagement with website, app, etc. (e.g., time on site, number of blog posts read)
- ☐ Brand purchase mix
- ☐ Product category purchase mix
- ☐ Date of last purchase of a product that has a clear lifecycle or consumption time period, especially if you have data to indicate pace of wear or consumption
- ☐ Timing of activity (e.g., shopping at night, buying in last 3 days of the month)
- ☐ Seasonal engagement (e.g., once-a-year gift buying)
- ☐ Responsiveness to level of discount (e.g., bargain hunter, full-price buyer)
- ☐ Responsiveness to new vs. established products and services
- ☐ Responsiveness to various forms of social proof (e.g., anonymous reviews, expert endorsements, customer testimonials, influencers)
- ☐ Responsiveness to various kinds of images (e.g., product details, model shots, in situ)

Engagement with Marketing Channels

- ☐ Level of engagement with channel (e.g., active, disengaged, inactive)
- ☐ Has engaged, converted, or taken another desired action in the past 30 days, 90 days, etc.
- ☐ Time of day, day of week, day of month, etc. when they engage most often
- ☐ Time that they've been opted into channel (e.g., new vs. tenured)

Brand Satisfaction & Loyalty

- ☐ Frequency of visits to brand's website, app, metaverse location, etc.
- ☐ Heavy, medium, light, or non-user of your product or service
- ☐ Annual spend
- ☐ Propensity to return orders
- ☐ RFM (recency-frequency-monetary value) score
- ☐ Net promoter score (NPS)
- ☐ Loyalty program tier (e.g., bronze, silver, gold)
- ☐ Number of reviews or ratings submitted
- ☐ Average rating or sentiment from reviews
- ☐ Number of friends, colleagues, or family members referred to brand
- ☐ Customer lifecycle stage
- ☐ Customer lifetime value

"The format of the data is just as important as having the data. For instance, you might have 'annual spend' in your data set—only to discover it's a calculated field that breaks spend into buckets like $0-$100. That's useful, but not if you want to show a consumer their exact annual spend in a personalized communication. Sometimes, getting what you want will require some data development with tech teams."

Kaiti Gary
Senior Director of Analytic & Strategic Services, Oracle Marketing Consulting

"In some cases, attributes that might seem unimportant to your brand provide meaningful insights in other ways. For instance, even if knowing a person's gender or marital status might not seem important to your risk model, because these attributes are highly populated, an unpopulated value in both can be an indicator of transience and indicate a higher risk that the customer will churn."

Patrick Maxwell
Senior Director of Solution Architecture, Oracle Marketing Consulting

What They've Left Unfinished

- ☐ Items left in their shopping cart
- ☐ Application incomplete
- ☐ Profile incomplete
- ☐ Project incomplete (e.g., product customization)

What They Haven't Done

- ☐ Haven't created an account
- ☐ Haven't completed their profile
- ☐ Haven't opted into your various marketing channels
- ☐ Haven't paid their bill
- ☐ Haven't signed up for auto-pay for bills
- ☐ Haven't applied for private label credit card
- ☐ Haven't joined loyalty program
- ☐ Haven't used digital help tools (vs. getting help through more expensive means such as your call center)
- ☐ Haven't used certain features or functions of your website, application, service, etc.
- ☐ Haven't made first purchase, second purchase, etc.
- ☐ Haven't purchased in a particular product category

"It is critical that these behavioral attributes be leveraged to drive personalization and demonstrate familiarity with the consumer with every cross-channel interaction, especially at the point of sale. Empower your brand experience and in-store digital marketing efforts with clienteling and consumer apps with in-store features."

JT Capps
Strategic Director of Analytic
& Strategic Services,
Oracle Marketing Consulting

"Cross-sell campaigns should be considered low-hanging fruit, especially for services companies. Use your product purchase data and profile information to encourage your customers to purchase in other categories. Not only is this an opportunity for additional revenue, but customers who buy across categories tend to be more loyal, too."

David Chang
Senior Director of Agency Services,
Oracle Marketing Consulting

Need help mobilizing your customer data for activation across channels?
Our customer data platform (CDP), **Oracle Unity**, brings together all of your data sources to create unified profiles so you can craft smart audience segments, uncover analytic insights, and use this data for campaigns across your marketing and advertising channels.

Talk to your Oracle account manager, **visit us online**, or reach out to us directly at **CXMconsulting_ww@Oracle.com**.

Social Influence Attributes

Data about the **reaction of others** to the subscriber's posts, reviews, videos, and other content, including:

- ☐ Number of followers, readers, viewers, etc.
- ☐ Number of likes or reactions
- ☐ Number of shares
- ☐ Number of comments or replies
- ☐ Number of visits driven by their content
- ☐ Number of conversions driven by their content

"Identifying your customers with the most social influence can help you determine where to put the most focus when offering a surprise and delight experience…and where to do the most damage control if the customer has a bad experience. Since these customers have the largest megaphones, they can be some of your brand's biggest advocates or critics."

Jonathan McClure
Director of Analytic & Strategic Services,
Oracle Marketing Consulting

"Combined with their brand affinity data, influence attributes offer a view of your top advocates and detractors. Use this info to identify conversion and win-back targets, as well as new prospects from among their followers."

Laura Marty
Consulting Technical Manager for Eloqua,
Oracle Marketing Consulting
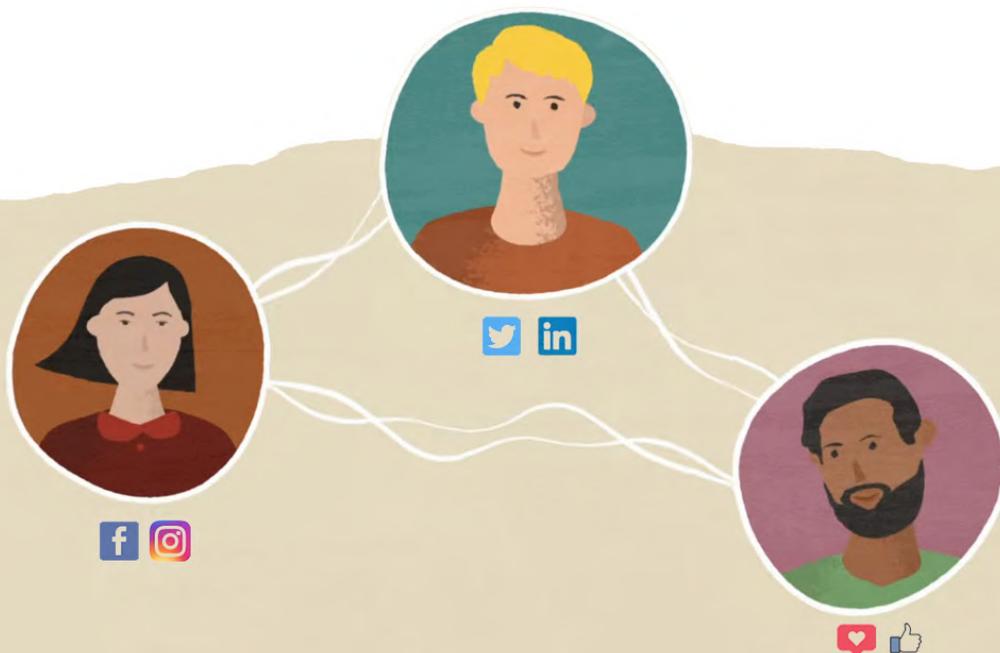
Using segmentation and personalization thoughtfully can help you increase your digital marketing engagement and conversions.

We can help with that—and much more.

Oracle Marketing Consulting has more than 500 of the leading marketing minds ready to help you to achieve more with the leading marketing cloud through...

+ Implementation Services

+ Platform Training & Adoption Services

+ Analytic & Strategic Services

+ List Growth & Demand Generation Services

+ Database Management & Compliance Services

+ Design Thinking & Innovation Services

+ Creative Services

+ Coding Services

+ Campaign Automation Services

+ Campaign Deployment & Monitoring Services

+ Email Deliverability Services

+ Performance Reporting Services

+ Website Optimization & Personalization Services

+ SMS & Mobile Push Services

+ Loyalty Program Services

Want help? Let's talk about how we can work together to seize your opportunities and overcome your challenges. Contact your Oracle account manager, **visit us online**, or reach out to us directly at **CXMconsulting_ww@Oracle.com**.