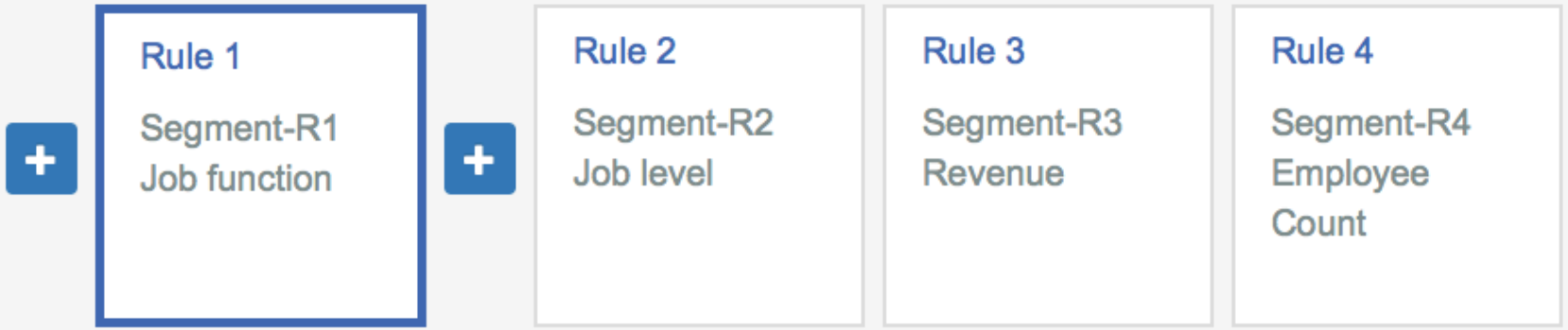
Lead Segmentation 101

OPENPRISE

Cook Book Series

Recipe Overview



This is a recipe for segmenting lead and contact data

- Create job function and job level segmentations from job title data
- Create company size segmentations by revenue and employee count

You will need the following raw data:

- Job title
- Employee count and definition of segments by employee count
- Revenue and definition of segments by revenue

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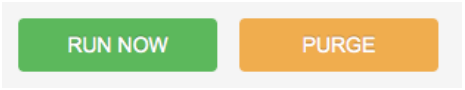
tips

- Add a rule by clicking on an existing rule 

and +.

- Put new data into a new data attribute so you can easily compare before vs. after and confirm the rule is doing what it is supposed to do.

- Can't see the open reference data? Check the setting in your Data Catalog:

- When tuning your reference data, use Data Pipeline's 

functions to iterate: (1) change reference data → (2) purge pipeline → (3) run pipeline → (4) review segmentation results

- Once your segmentation reference data is loaded into Openprise, you have the option to cut the link to Google Drive and maintain the data directly in Openprise

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Preparation: Create & Load Reference Data

Segments by Revenue

	A	B	C	D
1	Date	Min	Max	Range Name
2	8/4/2015	0	100000000	Less than $100M
3	8/4/2015	100000000	500000000	$100M to $500M
4	8/4/2015	500000000	1000000000	$500M to $1B
5	8/4/2015	1000000000	10000000000	$1B to $10B
6	8/4/2015	10000000000	1000000000000	More than $10B

Segments by Employee Count

	A	B	C	D	E
1	Date	Min	Max	Range	Range Name
2	8/4/2015	0	50	Less Than 50	Small Business
3	8/4/2015	50	100	51 to 100	Medium Business
4	8/4/2015	100	500	101 to 500	Medium Enterprise
5	8/4/2015	500	5000	501 to 5,000	Large Enterprise
6	8/4/2015	5000	1000000	More than 5,000	Multi-National

TIP: Create these reference data in Google Sheets, then import as Data Sources

Rule 1: Segment Job Function

Rule name *

Segment-R1 Job function

Rule template * Need help picking a template?

Infer value

IF this happens

Input Data Sources

Rule Output - Clean-R9 De-duplicate

SELECT DATA

Job Title contains (*)

THEN take these actions

Output Data Sources

Rule Output - Segment-R1 Job function

Inferred value

Use value from	Job Title
To infer a value for	Job_Function_Inferred
	ADD ATTRIBUTE
Inferred value mapping is stored in	Reference - Job Function - Multilin
Inferred value is stored in	Job Function
Look up values are stored in	Key Word
Match method	Contains
Resolve conflicts using the priority in	Priority

Reference Data

Reference - Job Function - Multilingual

Mapping of job title keywords to job functions. This reference data set is designed to work with data rules for creating job function segmentation based on job titles. Supported languages: English, Spanish, French, German, Portuguese, Italian.

TIP: Use “Priority” to help resolve conflicts when keywords are found in different context, such as “Network Administrator” (IT) vs. “Salesforce.com Administrator“ (Sales)

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Rule 2: Segment Job Level

Rule name *

Segment-R2 Job level

Rule template * Need help picking a template?

Infer value

IF this happens

Input Data Sources

Rule Output - Segment-R1 Job function

SELECT DATA

Job Title contains (*)

THEN take these actions

Output Data Sources

Rule Output - Segment-R2 Job level

Inferred value

Use value from	Job Title
To infer a value for	Job_Level_Inferred
	ADD ATTRIBUTE
Inferred value mapping is stored in	Reference - Job Level Seniority - M
Inferred value is stored in	Seniority
Look up values are stored in	Key Word
Match method	Contains
Resolve conflicts using the priority in	Priority

Reference Data

Reference - Job Level Seniority - Multilingual

Mapping of keywords in job titles to job seniority. This reference data set works with data rules to infer a person's seniority based on common keywords in the job titles. Supported languages: English, Spanish, French, German, Portuguese, Italian.

TIP: Use “Priority” to help resolve conflicts when keywords are found in different context, such as “Managing Director” (Executive) vs. “Director“ (Manager)

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Rule 3: Segment by Revenue

Rule name *

Segment-R3 Revenue

Rule template * Need help picking a template?

Assign value to range

IF this happens

Input Data Sources

Rule Output - Segment-R2 Job level

SELECT DATA

Annual Revenue is > value (0)

Your Reference Data

	A	B	C	D
1	Date	Min	Max	Range Name
2	8/4/2015	0	100000000	Less than $100M
3	8/4/2015	100000000	500000000	$100M to $500M
4	8/4/2015	500000000	1000000000	$500M to $1B
5	8/4/2015	1000000000	10000000000	$1B to $10B
6	8/4/2015	10000000000	1000000000000	More than $10B

THEN take these actions

Output Data Sources

Rule Output - Segment-R3 Revenue

Assign value to range

Assign value in Annual Revenue

to a ranges specified in Revenue Segments

Where

Minimum >= Min

Maximum < Max

Write normalized range value Range Name

to Revenue_Segment ADD ATTRIBUTE

TIP: Make sure your comparison operators are consistent with your reference data

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Rule 4: Segment by Employee Count

Rule name *

Segment-R4 Employee Count

Rule template * Need help picking a template?

Assign value to range

IF this happens

Input Data Sources

Rule Output - Segment-R3 Revenue

SELECT DATA

Number Of Employees is > value (0)

Your Reference Data

	A	B	C	D	E
1	Date	Min	Max	Range	Range Name
2	8/4/2015	0	50	Less Than 50	Small Business
3	8/4/2015	50	100	51 to 100	Medium Business
4	8/4/2015	100	500	101 to 500	Medium Enterprise
5	8/4/2015	500	5000	501 to 5,000	Large Enterprise
6	8/4/2015	5000	1000000	More than 5,000	Multi-National

THEN take these actions

Output Data Sources

Rule Output - Segment-R4 Employee Count

Assign value to range

Assign value in Number Of Employees

to a ranges specified in Employee Range

Where

Minimum > Min

Maximum <= Max

Write normalized range value Range

to Employee_Segment ADD ATTRIBUTE

TIP: Make sure your comparison operators are consistent with your reference data

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Job Function & Level Segmentation

Job Title	Job_Function_Inferred	Job_Level_Inferred
Sr Vice President	Management	Executive
Engineering	Engineering	Contributor
Sr. Security Analyst	IT	Contributor
Researcher	Marketing	Contributor
Director, JC3	IT	Manager
Senior Systems Security Analyst	IT	Contributor
Business Process Architect	Engineering	Contributor
Sr. Security Architect	IT	Contributor
IT Director	IT	Manager
Technical Director	IT	Manager
Security Ops	IT	
Systems & Network Admin	IT	Contributor
Cybersecurity	IT	
Information Security Analyst	IT	Contributor
Consulting Systems Engineer	Engineering	Contributor
Mgr. IT Security and Compliance	IT	Manager
Senior Vice President	Management	Executive
Chief Security Officer	Management	Executive
Director, Systems Security, Risk, and Compliance	IT	Manager
Co-founder		Executive
CEO	Management	Executive
CISO	IT	Executive
Engineer	Engineering	Contributor
Principal	Marketing	Contributor
Senior Manager - Security Consulting	IT	Manager
Senior Engineer	Engineering	Contributor
Compliance Technical Program Manager	IT	Manager
Technical Director	IT	Manager

Company Size Segmentation

Company Name	Number Of Employees	Employee_Segment	Annual Revenue	Revenue_Segment
Peoplefluent	210	101 to 500	100,000,000	$100M to $500M
General Electric Company	300000	More than 5,000	1.451	Less than $100M
Peoplefluent	210	101 to 500	100,000,000	$100M to $500M
General Electric Company	300000	More than 5,000	1.451	Less than $100M
Peoplefluent	210	101 to 500	100,000,000	$100M to $500M
E*TRADE GROUP INC.	2	Less Than 50	190,000	Less than $100M
Ping Identity	80	51 to 100	8,000,000	Less than $100M
OSG SHIP HOLDING INC	5	Less Than 50	28,400,000	Less than $100M
CITRIX	152	101 to 500	18,200,000	Less than $100M
CITRIX SYSTEMS	152	101 to 500	18,200,000	Less than $100M
CITRIX SYSTEMS	152	101 to 500	18,200,000	Less than $100M
Kansas City Power and Light	3200	501 to 5,000	2,260,000,000	$1B to $10B
E*TRADE	2	Less Than 50	190,000	Less than $100M
Peoplefluent	210	101 to 500	100,000,000	$100M to $500M
Kansas City Power and Light	3200	501 to 5,000	2,260,000,000	$1B to $10B
I2 INC.	67	51 to 100	6,600,000	Less than $100M
YELLOW PAGES GROUP	10	Less Than 50	636,900	Less than $100M
SUNRISE MEDICAL	469	101 to 500	175,500,000	$100M to $500M
Kansas City Power and Light	3200	501 to 5,000	2,260,000,000	$1B to $10B
Ping Identity	80	51 to 100	8,000,000	Less than $100M
E TRADE	2	Less Than 50	190,000	Less than $100M
SAINT-GOBAIN	500	101 to 500	7,400,000,000	$1B to $10B
CITRIX SYSTEMS INC.	152	101 to 500	18,200,000	Less than $100M
THOMAS JEFFERSON UNIVERSITY HOSPITAL	200	101 to 500	17,739,500	Less than $100M
General Electric Company	300000	More than 5,000	1.451	Less than $100M
E*TRADE	2	Less Than 50	190,000	Less than $100M
Kansas City Power and Light	3200	501 to 5,000	2,260,000,000	$1B to $10B
CITRIX SYSTEMS	152	101 to 500	18,200,000	Less than $100M

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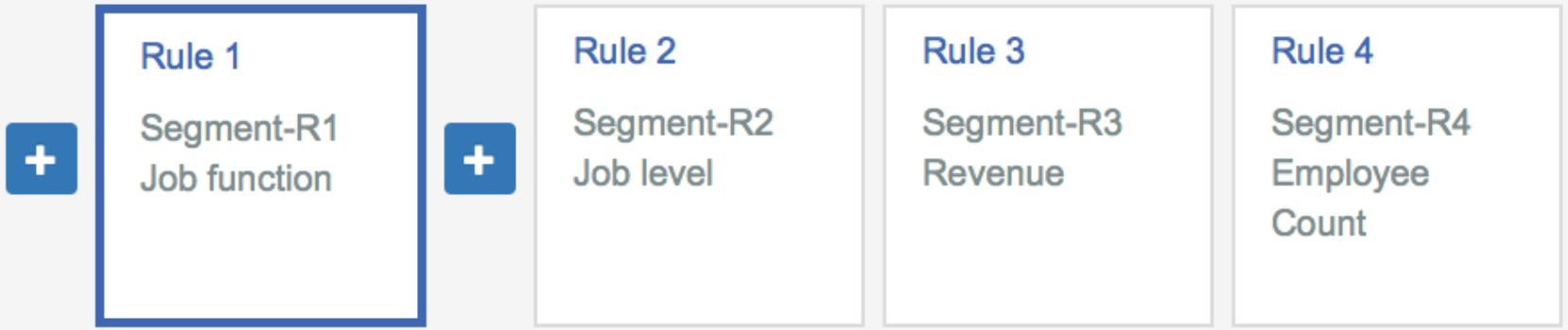
Recipe Review



Recommendations

- Start with the Openprise Job Level and Job Function reference data, then tune it to suite how you sell and who do you sell to. Download the Open Data then upload the modified versions as your own.

Want to do more? Try the following on your own:

- Create industry-specific job segmentations. For example, VP in financial services is a manager, not an executive.
- Have a segment label as well as a range? Tag each record with both. Example: “$100M to $500M” is “Medium Enterprise”.

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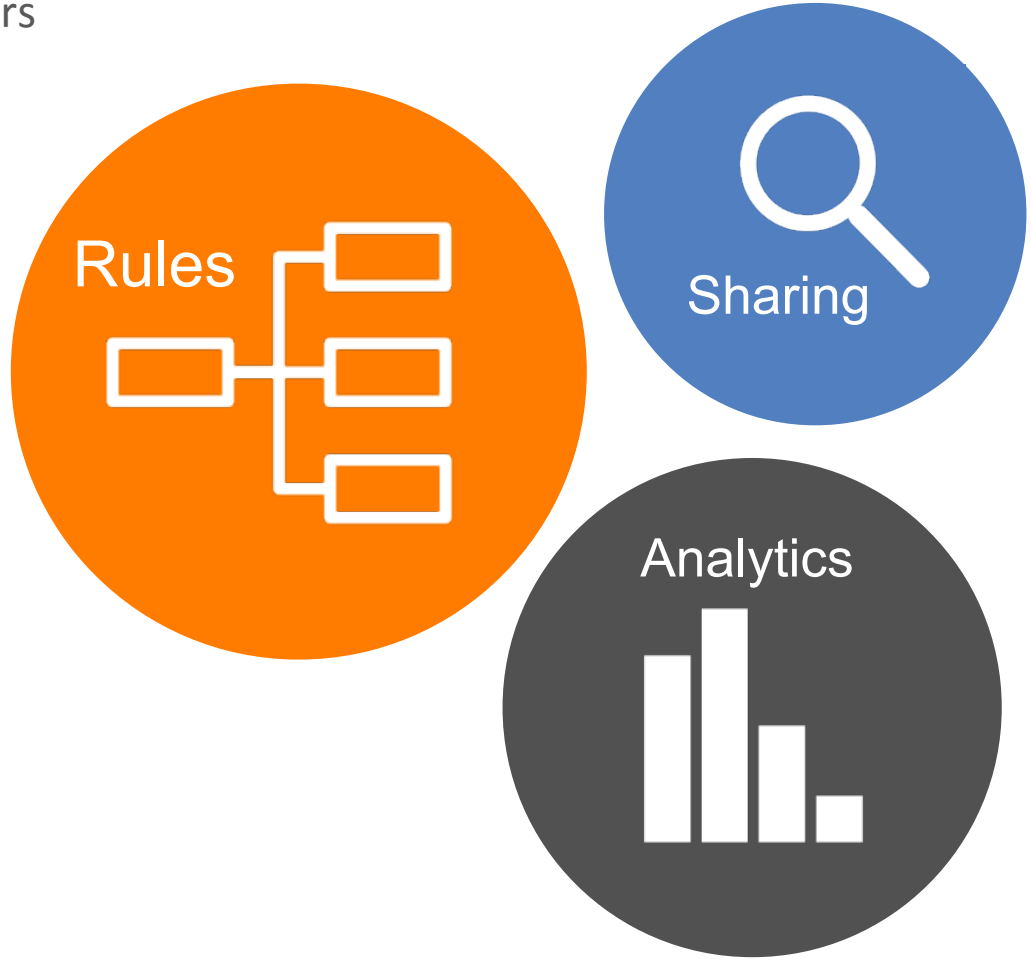
Data Automation For Business Users



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