CUSTOMER EDITION

HOW TO USE LISTS TO OPTIMIZE YOUR SOCIAL INBOX.

How to Use Lists to Segment Contacts and Focus Social Media Management.

IS THIS BOOK RIGHT FOR ME?

Not quite sure if this ebook is right for you? See the below description to determine if your level matches the content you are about to read.

INTRODUCTORY ━━━━━━━━━━━ THIS BOOK

Introductory content is for marketers who are new to the subject. This content typically includes step-by-step instructions on how to get started with this aspect of inbound marketing and learn its fundamentals. After reading it, you will be able to execute basic marketing tactics related to the topic.

INTERMEDIATE ▬▬▬▬▬

Intermediate content is for marketers who are familiar with the subject but have only basic experience in executing strategies and tactics on the topic. This content typically covers the fundamentals and moves on to reveal more complex functions and examples. After reading it, you will feel comfortable leading projects with this aspect of inbound marketing.

ADVANCED ▬▬▬▬

Advanced content is for marketers who are, or want to be, experts on the subject. In it, we walk you through advanced features of this aspect of inbound marketing and help you develop complete mastery of the subject. After reading it, you will feel ready not only to execute strategies and tactics, but also to teach others how to be successful.

CONTENTS.

Lists and Why They're Important.

Simply put, lists are the best way to segment your contacts in HubSpot based on any criteria you choose. The Lists tool is available in all versions of HubSpot and helps customers break down their contact database based on information such as demographics, past interactions with your company, visits to your website, and more. Historically, customers have used lists to optimize marketing activities such as email marketing and workflows, making it easier for users to target the specific contacts that they want.

Now, customers can use lists to create targeted streams to help with social media management too. This new list monitoring capability is a feature of HubSpot's newest social media tool, Social Inbox. With Social Inbox, you can segment your Twitter feed by only monitoring the activity of specific HubSpot lists. This helps you target your time by responding only to the activity that is most important to you.

After reading this ebook, you should have a clear understanding of:

• Lists and why they're important

• How to create a list in HubSpot

• How to use lists in Social Inbox to optimize your social media management

Enjoy!

# HOW TO CREATE LISTS IN HUBSPOT.

How to Create Lists in HubSpot.

Lists are the primary tool that HubSpot customers use to segment and organize their contact database. You can segment your database by selecting specific criteria to break contacts into subgroups. In this section, you will learn how to use the HubSpot Lists tool to effectively segment your contact database and help you target your marketing activities.
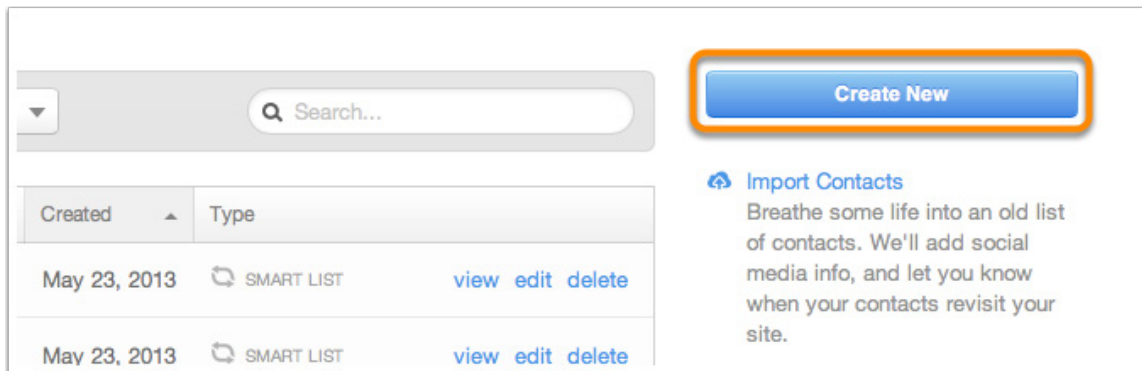
LET'S GET STARTED

There are many combinations of criteria you could use to create a list. For this guide, we've chosen to create the following example list: leads owned by Ben Ratner who have viewed 10 or more pages on your website.

1.) First, go to the Contacts tab and select **Lists**.
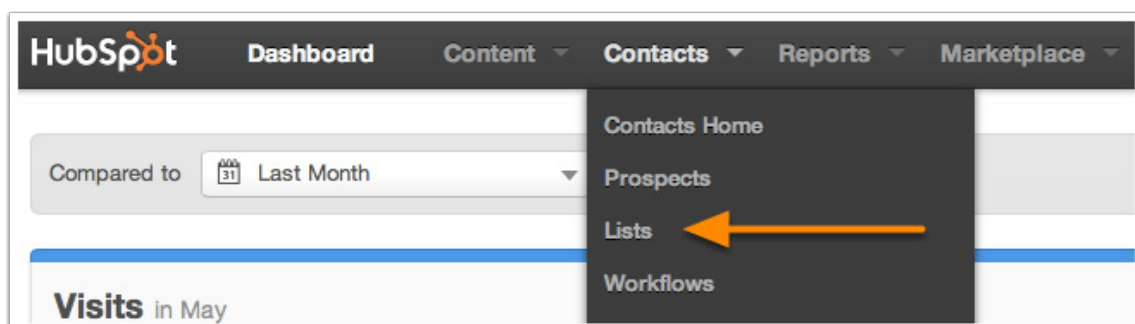
2.) Then, create a new list by clicking the **Create New** button.

Now, create a name for your list and decide whether the list should be smart or static. These are two different types of lists that can both be helpful for different types of marketing activities.

Smart – These lists are continually populated as new contacts that fit the list's criteria enter your database.

Static – These lists only include the contacts that fit the list criteria at the time that the list was created. Also, an imported list could be a static list.

In this example, we'll select a Smart List.
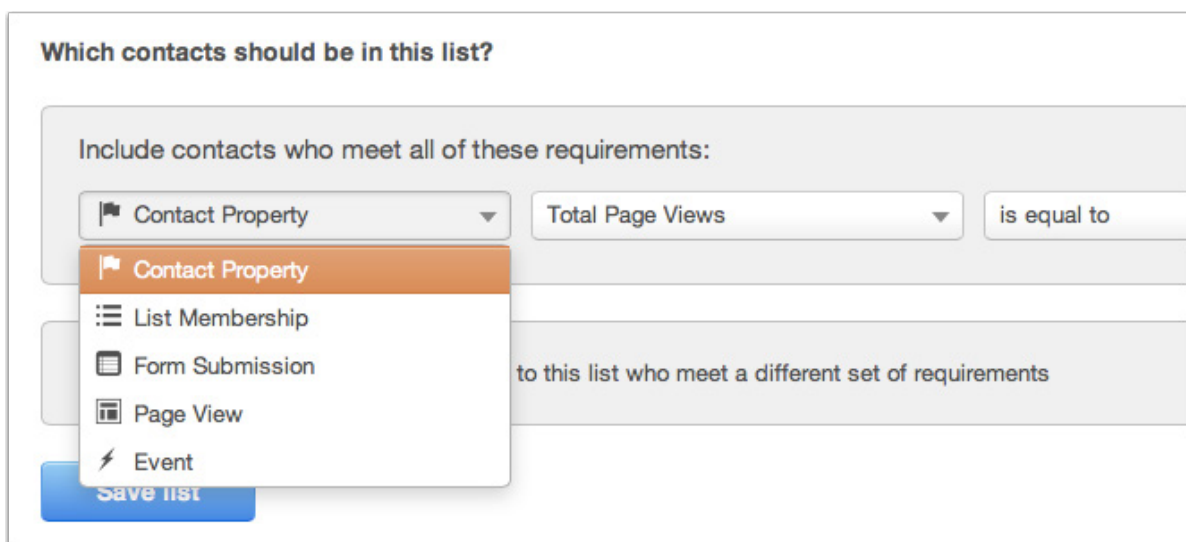
3.) Now, add contacts to this list and select whether you want to add contacts based on:

- A property value
- List membership
- A form submission
- A page viewed (Enterprise only)
- A custom marketing event (Enterprise only)

Please note that some of the criteria groups listed above are only available for Enterprise users.

The criteria that we want for this list - lead owner and number of page visits - are information stored on the contact property. For this reason, you should select "Contact Property" to set up the filters for your list.

Which contacts should be in this list?

Include contacts who meet all of these requirements:

| ⚐ Contact Property ▼ | Total Page Views ▼ | is equal to |

| ⚐ Contact Property |
| ☰ List Membership |
| ▦ Form Submission |
| ▣ Page View |
| ⚡ Event |

to this list who meet a different set of requirements

Save list

Select the following criteria: **Contact Property > Lead Owner > is equal to > Ben Ratner.** Then click the (+) sign to add another filter.

Next, use the criteria **Contact Property > Total Page Views > is greater than or equal to > 10** to specify that not only should contacts in your list have Ben Ratner as their lead owner, but they also must have viewed 10 or more pages on your website.

To finish creating the list, click the **Save list** button at the bottom of the list editor.

You can now find your list under the main Lists Dashboard.
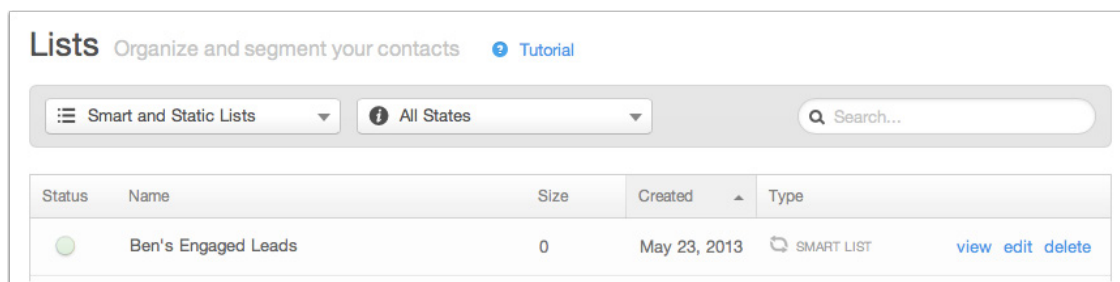
Congratulations! You have created your first list. Now let's discuss how to use that list within Social Inbox.

HOW TO USE LISTS IN SOCIAL INBOX.

How to Use Lists in Social Inbox.

Social Inbox is HubSpot's newest social media tool that helps customers create customizable Tweet streams based on specific contact lists and keywords. This feature helps customers focus their monitoring activity, because Social Inbox only tracks information most relevant to the customer.

You can use your newly-created list to target your social media monitoring activities in Social Inbox. In this example, you will be using the segmented list from the previous chapter to create a Tweet stream of "Ben's Engaged Leads" who have tweeted a specific keyword or phrase that's important to you.

LET'S GET STARTED

1.) To start, go to the Social Media tool: **Content > Social Media**
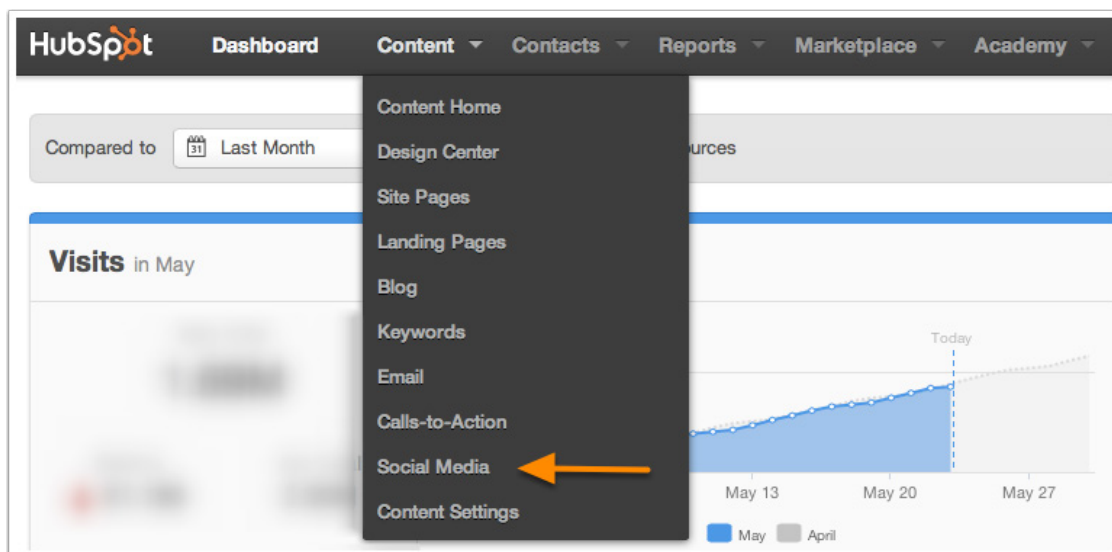
2.) Then, access your Social Inbox on the right side of your Social Media dashboard by clicking **Monitoring**.

3.) Next, create a new stream by clicking the **Create a new stream** button.
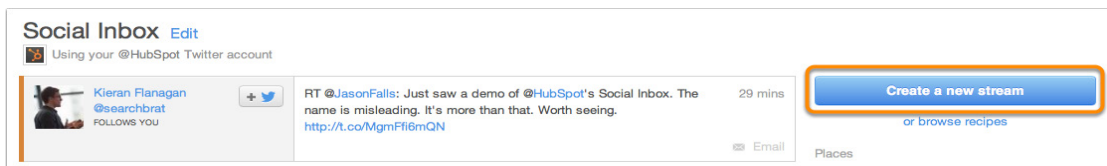
4.) Now it's time to set up your stream.

First, decide which of your Twitter accounts you would like in your stream. Then, consider how you want to segment the activities that will show up in your stream. You can segment your Social Inbox stream to only include activities from:

- All of Twitter

- A Twitter List

- A HubSpot Contact List

In this example, since you are creating a stream based on a list you have created in your HubSpot database, you will select **A Contact List**.

Once you have selected **A Contact List**, a second drop down menu
will appear, labeled **Select a Smart List**. Then select "Ben's Engaged
Leads." But perhaps you don't want to see every single Tweet. You can
also set up keyword filters that only track Tweets that mention words or
phrases that are important to you. For this example, the keywords that
we will choose are "inbound," "marketing," and "inbound marketing."

Would you like to save yourself time from needing to click into the
HubSpot tool to check for new social activity? Then add email recipients
in the **Notify these recipients** box to opt yourself or others in to an
email alert any time a new Tweet shows up in your stream. You can also
choose whether you would like the email alerts to be sent immediately,
or at the beginning/end of the day.

To finish, click the **Create** button at the bottom of the stream editor.

Success! You should now be able to access, monitor and edit the new stream from your Social Inbox Dashboard.
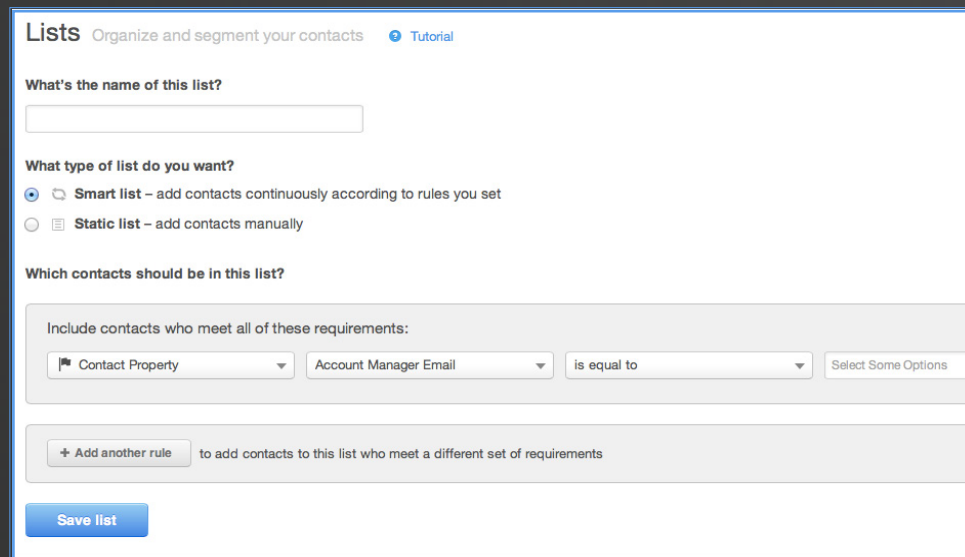
Beyond the exercises that you just completed, there are many ways you can use lists to enhance inbound marketing and social media monitoring. On the next page are some useful resources that will help you learn more about what you can do to segment your contacts database and optimize your Social Inbox. We hope you find great value from the Lists and the Social Inbox tool!

GET STARTED.

CLICK TO GO TO HUBSPOT AND BUILD YOUR LIST.

ADDITIONAL RESOURCES

- Tutorial: How to Segment your Contacts to Create Email Lists

- Tutorial: How to Create a Smart-List in HubSpot

- Blog Article: Why Segmentation Matters in Email Marketing

- Blog Article: 27 Ways to Slice & Dice Your Email List for better Segmentation

- Ebook: How Social Inbox can Help your Marketing, Sales and Support

HubSpot