

CUSTOMER EDITION

HOW TO USE LISTS TO OPTIMIZE YOUR SOCIAL INBOX.



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

A publication of

HubSpot

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.

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- 05 HOW TO CREATE LISTS IN HUBSPOT.
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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!

01

CHAPTER

HOW TO CREATE LISTS IN HUBSPOT.

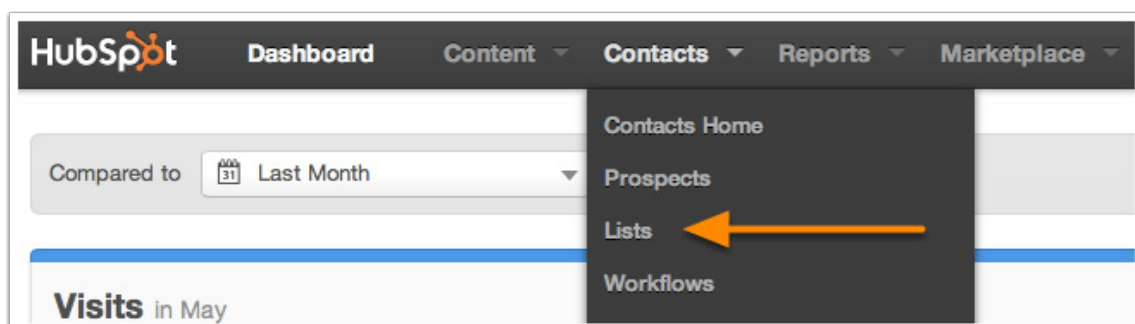
How to Create Lists in HubSpot.

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.

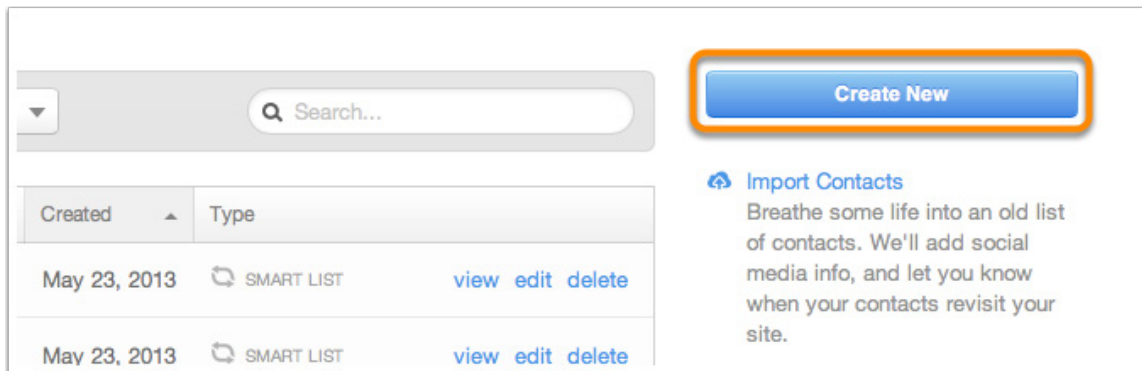
LET'S GET STARTED

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.

What's the name of this list?

Ben's Engaged Leads

What type of list do you want?

☒ **Smart list** – add contacts continuously according to rules you set

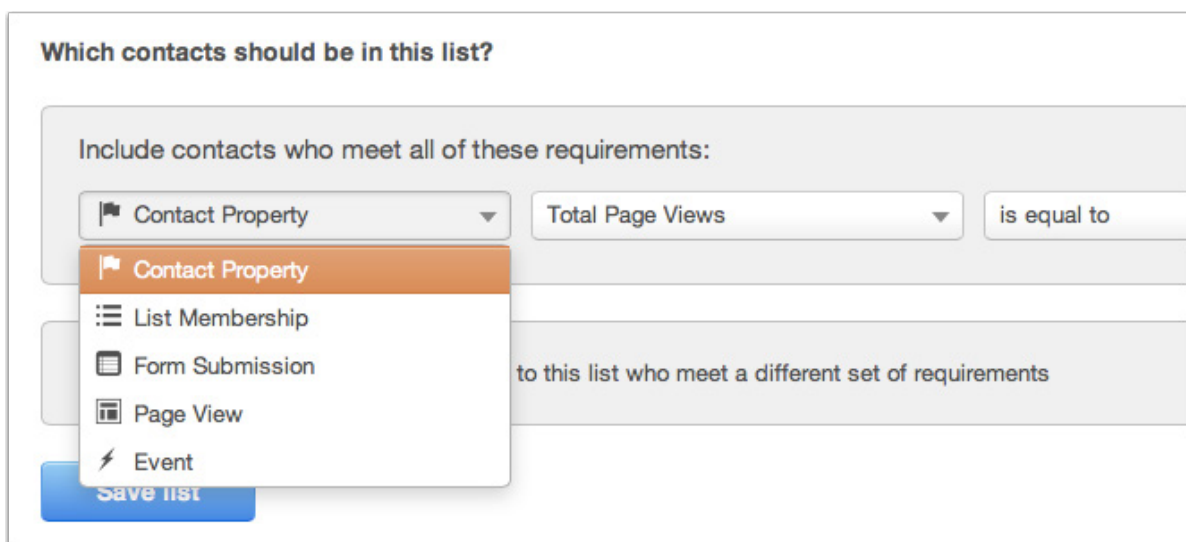
☐ **Static list** – add contacts manually

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.



The screenshot shows a form titled "Which contacts should be in this list?". It contains a section "Include contacts who meet all of these requirements:" with a dropdown menu currently set to "Contact Property". The dropdown menu is open, showing options: "Contact Property" (highlighted), "List Membership", "Form Submission", "Page View", and "Event". To the right of the dropdown is a text input field containing "Total Page Views", followed by a dropdown menu and the text "is equal to". Below this is a section "Add contacts to this list who meet a different set of requirements" with a plus icon. At the bottom left is a blue "Save list" button.

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

Which contacts should be in this list?

Include contacts who meet all of these requirements:

Contact Property Lead Owner is equal to Ben Ratner

A red box highlights the plus sign button 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.

Which contacts should be in this list?

Include contacts who meet all of these requirements:

Contact Property Lead Owner is equal to Ben Ratner

Contact Property Total Page Views is greater than or equal to 10

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

Include contacts who meet all of these requirements:

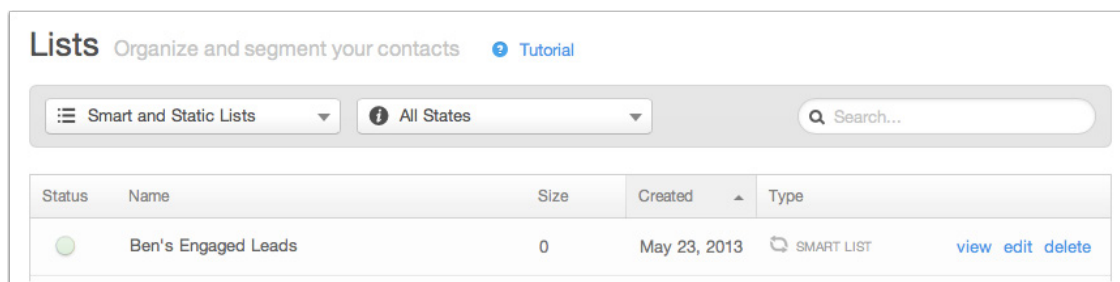
Contact Property Lead Owner is equal to Ben Ratner

Contact Property Total Page Views is greater than or equal to 10

+ Add another rule to add contacts to this list who meet a different set of requirements

Save list

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.



02

CHAPTER

HOW TO USE LISTS IN SOCIAL INBOX.

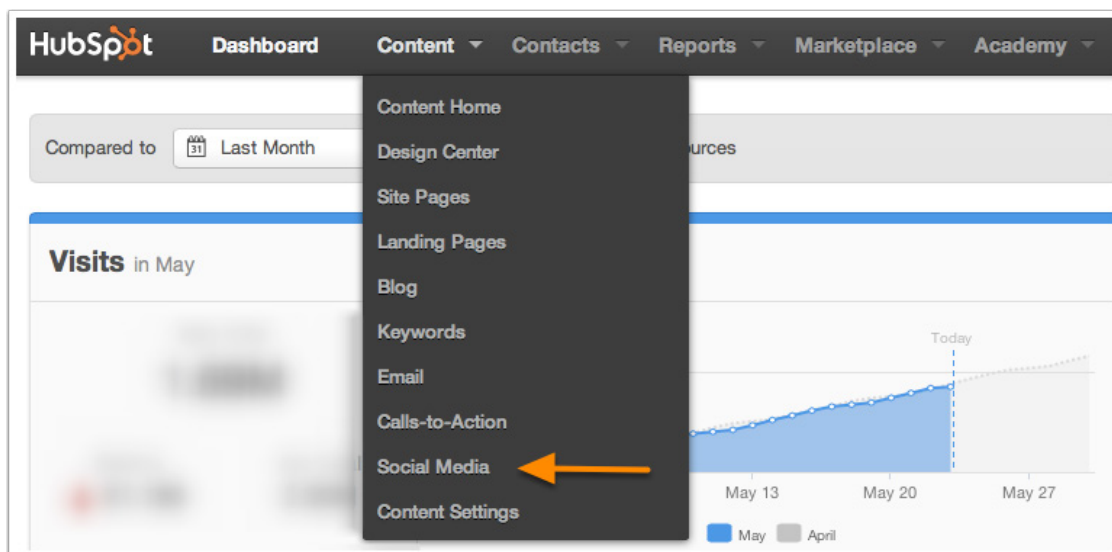
How to Use Lists in Social Inbox.

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

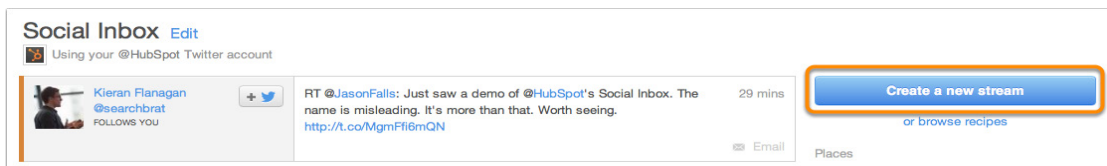
1.) To start, go to the Social Media tool: [Content > Social Media](#)



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**.

Create a new stream

Select an account:

@HubSpot

Select whose tweets you'll monitor:

All of Twitter A Twitter List **A Contact List**

Select a Smart List:

Select a Smart List

Including these keywords: [suggestions](#)

inbound, marketing,

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.

Select an account:
@HubSpot

Select whose tweets you'll monitor:
All of Twitter A Twitter List A Contact List

Select a Smart List:
Ben's Engaged Leads

Including these keywords: [suggestions](#)
inbound × marketing × inbound marketing ×
inbound, marketing,

Notify these recipients:
Select Some Options
Recipients will get emails as results are found.
Immediately 8 am 8 am & 4 pm

Name this stream:
Ben's Engaged Leads

Create

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

Select a Smart List:
Ben's Engaged Leads

Including these keywords: [suggestions](#)
inbound × marketing × inbound marketing ×
inbound, marketing,

Notify these recipients:
Select Some Options
Recipients will get emails as results are found.
Immediately 8 am 8 am & 4 pm

Name this stream:
Ben's Engaged Leads

Create

Success! You should now be able to access, monitor and edit the new stream from your Social Inbox Dashboard.

Ben's Engaged Lead Stream [Edit](#)

Using your @HubSpot Twitter account

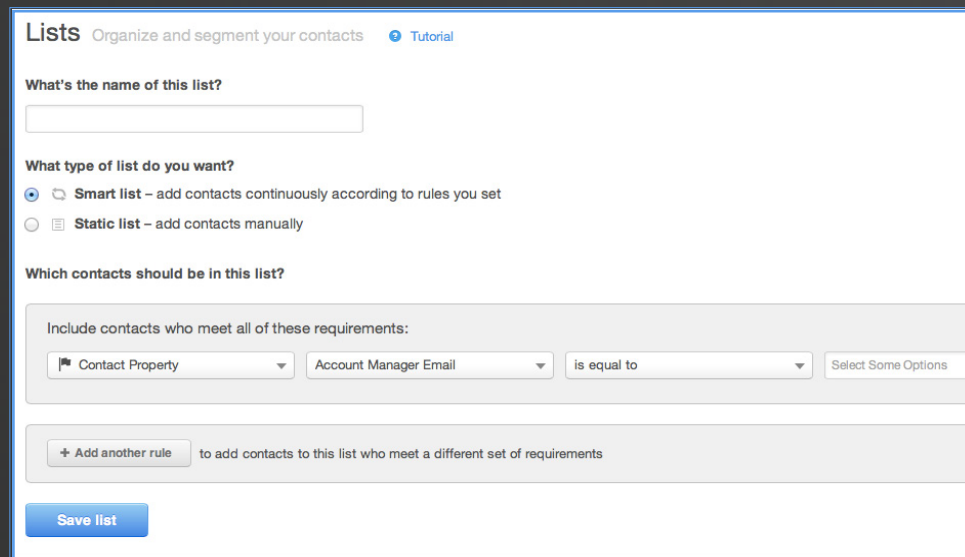
Stream successfully created. Check out all of the available recipes.

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.



The screenshot shows the 'Lists' creation page in HubSpot. At the top, it says 'Lists Organize and segment your contacts' with a 'Tutorial' link. The first section asks 'What's the name of this list?' with a text input field. The second section asks 'What type of list do you want?' with two radio button options: 'Smart list - add contacts continuously according to rules you set' (which is selected) and 'Static list - add contacts manually'. The third section asks 'Which contacts should be in this list?' and includes a rule builder. The rule builder shows a single rule: 'Include contacts who meet all of these requirements:' followed by a dropdown menu showing 'Contact Property', another dropdown showing 'Account Manager Email', and a third dropdown showing 'is equal to'. There is a 'Select Some Options' button next to the rule. Below the rule builder is a button '+ Add another rule' with the text 'to add contacts to this list who meet a different set of requirements'. At the bottom is a blue 'Save list' button.

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](#)