

# Reaching the Right People: Audience Segmentation Without the Jargon



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**Whitney Burgess Scales** 

**Shareholder, VP of Marketing Strategy** 

Reaching the **Right People Audience Segmentation** Without the Jargon



# Key Objective s

## How to Define and Prioritize Audiences (e.g. donors, policymakers, media, communities served)

- Matching message and medium to the audience (e.g. don't use Instagram just because everyone else does)
- Tools for narrowing focus without losing inclusivity
- Examples of right-sizing outreach: when a small list outperforms a big splash

# Strategy Audience Channel Tactics

# If you only had a dollar... How would <u>you</u> spend it?



## **Define Your Audience**

Base











# NEW Key Objectives

#### **Smart Segmentation for Savvy Marketers**

- Strategies for adapting marketing tactics to target specific segments effectively
- Best practices for cross-selling and identifying target audiences
- How to measure and improve lead quality

Put your first-party data to work! Grow new and existing accounts with smart segmentation and marketing automation. In an era where 72% of consumers expect businesses to recognize them as individuals and understand their interests, segmentation isn't just a "nice to have"—it's a competitive advantage. With 2025 updates from META and Google restricting financial industry targeting, relying on traditional look-alike (LAL) audiences is no longer an option. But savvy marketers are adapting, using list targeting, event signals, and automation to grow their customer base and increase their share of wallet. This session will walk through actionable strategies to build better audiences, drive smarter cross-sell campaigns, and ultimately, scale growth without the tools we once depended on.

# \*All-Star Marketing\*









- At the <u>RIGHT</u> time
- On the <u>RIGHT</u> channel
- With the RIGHT message frequency
- **Measure effectiveness**
- Trim your budget by 20%
- Do a TikTok dance and go viral





# Challenges

#### **Evolving Funnel**

- → Search is Rapidly Changing
- Customer Journey
   Mapping is no longer
   Linear
- → Traditional TV is Dying

#### Targeting Restrictions

- → Meta removed look-alike targeting for the Finance Category (Jan 2025)
- → Google only allows
  Minimum of city-level
  Targeting
- → Meta only allows
  Minimum of city-level +
  15-miles

#### Pressure to Scale

- → MORE Channels
- → MORE Content
- → MORE Data



# **Solutions**

#### Distribution Funnel

- → Discoverability through SEO, AEO, and GEO
- → Create an influence map to determine the marketing mix
- → Connected TV is thriving

#### **Targeting Abilities**

- → First-Party Data will always be important
- → Display & CTV still allows Household Targeting
- Attribution is key between channels
- → ROI can set your budgets for future years to come

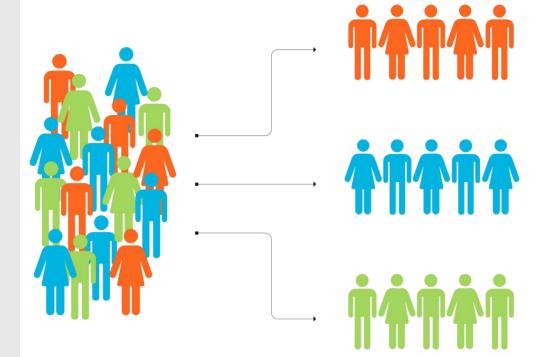
#### Pressure to Scale

- → MORE Channels: Google & Meta are not the only game in town
- → MORE Content: SEO, AEO, and GEO
- MORE Data: First-Party data MUST be utilized and is Compliant

# What is marketing segmentation?

## Segmentation

Marketing segmentation is the process of dividing a broad target market into smaller, more specific groups of consumers who share similar characteristics, needs, behaviors, or interests. By segmenting the market, you can tailor their products, services, and marketing efforts to better appeal to the distinct needs and preferences of each segment, rather than using a one-size-fits-all approach. This allows for more effective marketing, improved customer loyalty, and a higher return on investment.





## Savvy Marketing Moves the Needle



#### Segmentation

- → Product Promotion
- → Creative
- → Vertical Video
- → Budget (Cost-Per-Action)
- → Audience Targeting
- → KPIs
- → Landing Pages and Thank You Pages
- → Forms/Applications
- → Tracking
- → Reporting: Online & Offline

# Segmentatio n

Use First Party Data to Understand Your Customer's Journey

## **Assignment: Segment Checking**

# **Checking Accounts**

#### Savvy Segmentation

- Premium Checking
- Free Checking
- Student Checking
- Business Checking
- Small Business Checking
- Bundle Offerings

#### **Case Study**

# **Premium** Checking

**3 Month Performance Review** 

#### Challenge

**Increase premium checking applications** 

Develop an online marketing mix to drive product lead measurable ROI.

Establish performance marketing reporting benchmarks, tracking and reporting.

#### Solution

#### Performance Marketing

- Doppio® Display & Retargeting Connecte

10,450+ **Unique Pageviews**  2,578

**Application Starts** application starts, form fills & calls

Cost-Per-**Application Start**  25%

**Application Rate** 

93%

Of all conversions\* came from mhp.si

83%

**Savings** 

Cost-Per-

500% Lift

**Application Rate** 

Application Start

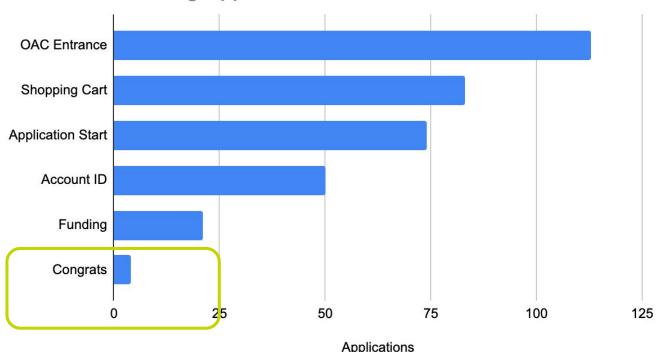
2023 Finance Industry Performance Benchmarks (Google) 2023 Finance Industry Performance Benchmarks (Meta)

\$71.44 Cost-Per-Conversion for Search, \$84.10 Cost-Per-Conversion for Display 4.17% Conversion Rate for Search, 0.80% Conversion Rate for Display, 5.01% for Social Media



# Getting people ALL the way through the application process

**Premium Checking Applications Process** 



#### **Case Study**

# **Business Checking**

**3 Month Performance Review** 

#### **Challenge**

**Increase business checking applications** 

Develop an online marketing mix to drive product lead measurable ROI.

Establish performance marketing reportive benchmarks, tracking and reporting.

#### **Solution**

**Performance Marketing** 

- Paid Search
- ✓ LinkedIn
- Doppio® Display & Retargeting Connected

394% Lift

**Application Rate** 



KPI	90-Days w/ mhp.si	Previous Campaign w/ previous agency
Impressions	3,227,720	1,941,288
Clicks	97,351	10,283
Cost Per Click	\$1	\$18 (SEM ONLY)
<b>Total Digital Leads</b>	430	87 (SEM ONLY)
Click-to-Call	17	_
Calls from Ads	39	_
Form Fills	175	_
Visit a Branch	199	_
Cost / Digital Leads	\$163	\$839
New Users - /business in Dallas	13,677	-

80% Savings

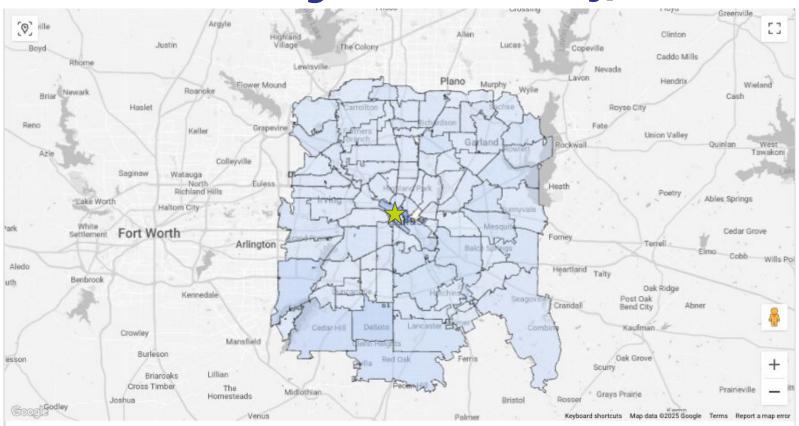
> Cost-Per-Application Start

4.17% Conversion Rate for Search, 0.80% Conversion Rate for Display, 5.01% for Social Media

<sup>2023</sup> Finance Industry Performance Benchmarks (Google) 2023 Finance Industry Performance Benchmarks (Meta) \$71.44 Cost-Per-Conversion for Search, \$84.10 Cost-Per-Conversion for Display



### **Business Checking in Dallas County, TX**





### **Key Learnings: Audience Insights by Industry**

### **Top 10 List**

Company names that engaged with the ads

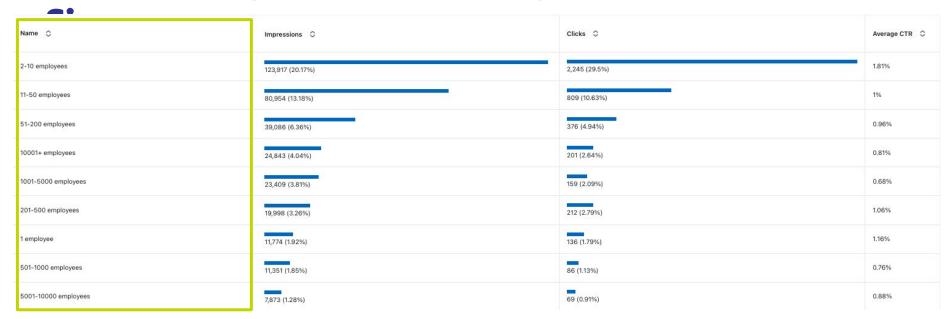
Impressions ≎	Clicks 🔾	Average CTR ♀
10,476 (1.71%)	150 (1.97%)	1.43%
29,931 (4.87%)	411 (5.4%)	1.37%
40,724 (6.63%)	537 (7.06%)	1.32%
35,645 (5.8%)	459 (6.03%)	1.29%
13,246 (2.16%)	159 (2.09%)	1.2%
13,745 (2.24%)	164 (2.16%)	1.19%
10,952 (1.78%)	130 (1.71%)	1.19%
12,779 (2.08%)	151 (1.98%)	1.18%
10,538 (1.72%)	122 (1.6%)	1.16%
24,770 (4.03%)	279 (3.67%)	1.13%

Source: LinkedIn

Flight: Feb. 1, 2025-Aug. 10, 2025



### **Key Learnings: Audience Insights by Company**



Source: LinkedIn

Flight: Feb. 1, 2025-Aug. 10, 2025

# **Study the Data**

1

#### First-Party Data

Data you own and collect about your customers

2

#### **Second-Party Data**

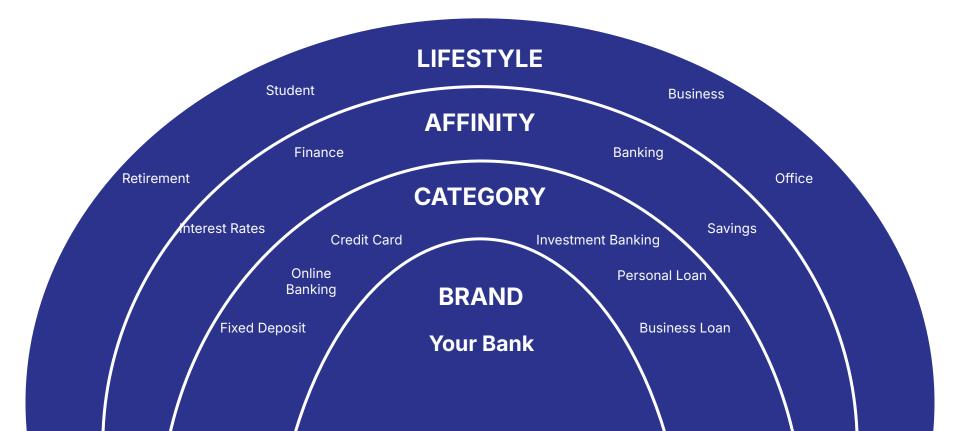
Data you rent or purchase about your potential customers from a data source 3

#### **Third-Party Data**

Data collected on other sites based on your potential clients' online and offline footprint

### **Data Layering with Doppio®**







## **Marketing Strategy Planning**

#### Customer Database Review

- → Where do they live?
- → What is their demographic makeup?
- → What products do they currently have?
- → What are the demos on the click to start Application or Contact

#### Marketing Channels Performance Review

- → What type of ads are people engaging with?
- → Which channels are converting the best?
- → Are people taking desired action?
- → Heatmaps of conversions on a County Level

# Message Performance Review

- Does the creative match the audience you're trying to reach?
- → Does the creative match the channel (!!!)?



88% of financial decisions are made within the home



# 4100

41% of viewers prefer to watch a video to learn about a financial product or service.

Households have an average of 11 devices connected to the wifi.





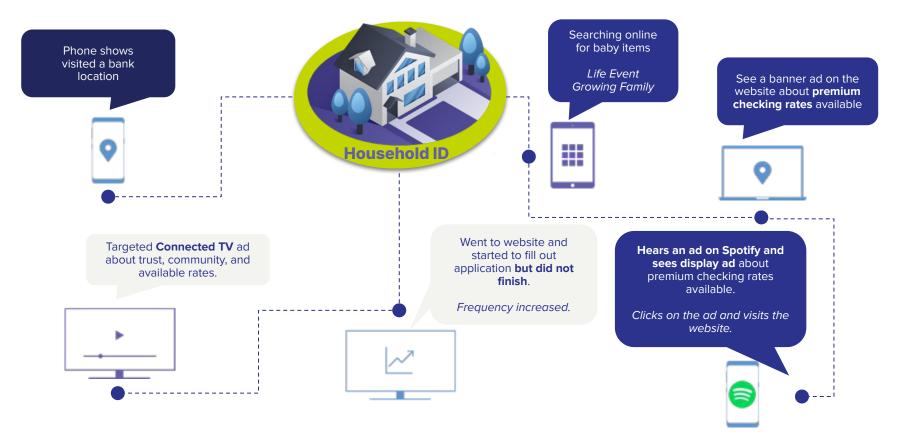
Consumers use three or more channels before converting.

## Telling a customer experience story by



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Example: Opening a Checking Account







194.1 million users

#### **Demographics**

- 68% of U.S. adults
- 78% of women
- 61% of men

**Largest Age Group** 30-49 age range

#### **Fun Fact**

Users access Facebook an average of 8 times daily.



166.2 million users

#### **Demographics**

- 37% of U.S. adults
- 55% of women
- 44% of men

**Largest Age Group** 18-34 age range

#### **Fun Fact**

US adult users spend an average of 33.1 minutes per day on the platform



LinkedIn

206 million users

#### **Demographics**

- 84% of U.S. adults
- 30% of women
- 35% of men

**Largest Age Group** 25-49 age range

#### **Fun Fact**

44% of LinkedIn users take home more than \$75,000 per year.



YouTube

239 million users

#### **Demographics**

- 83% of U.S. adults
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- 87% of men

**Largest Age Group** 18-49 age range

#### **Fun Fact**

Customers are 67% more likely to buy a products after seeing it on YouTube.



170 million users

#### **Demographics**

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US adult users spend an average of 53.8 minutes per day on the platform.



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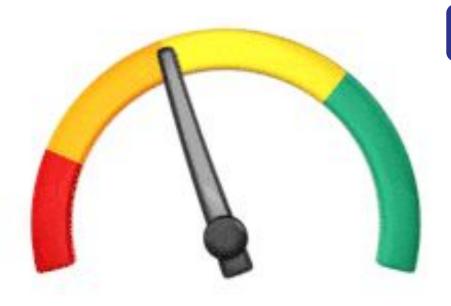






AND SO MANY MORE!!!!

# Savvy Marketing Moves the Needle



#### Premium Checking

- → Copy that resonates with your customer
- → Reflective creative to show the life event
- → Educational Video explaining the benefits of YOUR premium checking account
- → Meta (Facebook & Instagram)
- → Landing Page
- → Form and Thank You page

#### **Business Checking**

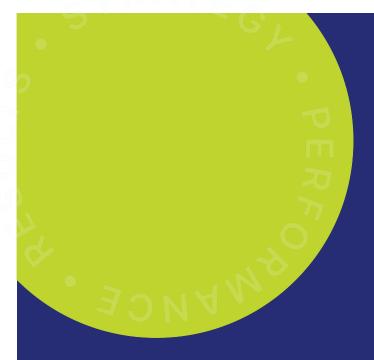
- Copy that resonates with their industry and the problem they need you to solve
- Reflective creative to show the industry you're targeting
- → Educational Video explaining the benefits of YOUR business checking account
- → LinkedIn and YouTube
- → Landing Page
- → Form and Thank You page





# **Audience Segmentation**

- First-Party Data Segments
- Campaign Objectives
- Website Events and Pages
- Conversion Sources
- Conversion Messages
- And MORE!!!



STRATEGY. STRATE

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LITTLE ROCK · BENTONVILLE



#### **Define Your Channels**

# Low-Cost, High-Impact Marketing Tools

Tool	Cost	Use
Facebook Page	Free	Events, town pride, job postings
Instagram Page	Free	Videos and stories about events, business promotions, and activities
Canva	Free	Design flyers & social media
QR Codes	Free	Link signs to online info
Email Lists	Free	MailChimp, Constant Contact  Monthly updates to stakeholders
School/Student Collabs	Free	Videos, contests, takeovers
Website	\$-\$\$\$	Squarespace, WordPress Design for mobile

# **Everyone's FAVORITE Radio Station** is...



**Everyone's FAVORITE Radio Station** is...

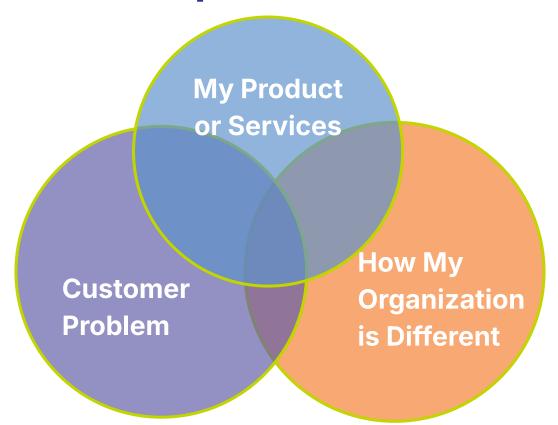


# WIIFM

What's In It For Me?



# **Define Your Value Proposition**





# **Define Your Message**



#### **Craft a Unique Narrative**

Develop a distinct story that highlights your organization's mission and values, making it relatable for your audience.

#### **Identify Target Audiences**

Clearly define who your message is aimed at, ensuring it resonates with your audience.

#### **Highlight Organization Benefits**

Emphasize the unique advantages your organization offers to attract interest and engagement.

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### **Atomization in Action**



#### **One Piece of Content Can Fuel:**

## **Upcoming Event**

Website Homepage

**Email to Community Partners & Base** 

**Facebook Event** 

Facebook Post, Story, and Reel

Instagram Post, Story, and Reel

Video for YouTube

**Community Event Calendar** 

Recap Blog Post





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\$1,000	\$5,000	\$15,000		
Prioritize owned and borrowed channels (organic/non-paid)				
Maximize and activate your base  Focus on message frequency				
100% paid media - Paid social	<ul><li>75% paid media</li><li>- Paid social</li><li>- Radio</li><li>25% content development</li></ul>	70% paid media  - Google Ads - Paid social - Radio - Connected TV  30% content development		
One Paid Channel MAX	Three Paid Channels MAX	Five Paid Channels MAX		

# Key Objective s



#### **Budget Tiers:**

What you can do with \$1K, \$5K, or \$15K

#### **Sample Spending Plans:**

Social Boosts vs Paid Placements vs.
 Contractor Time

#### **Low-cost/High-Impact Tactics:**

 Repurposing content, partnering with others, leveraging grant resources

When to Invest vs. When to Pause



