

# CRM Contact Lists and Segmentation Briefing

This guide is designed to help you spot tasks that can be handed over to a VA, what Jessanol would usually need from you, and what the end result could look like.

## HOW THIS HELPS

Contact lists are much easier to use when they are clean, organised and grouped in a way that makes sense. If everyone is sitting in one big list, it becomes harder to send relevant updates, follow up properly or understand who you are communicating with.

Jessanol can help tidy CRM contact lists and create practical segments so communication is easier to manage.

## THIS IS USEFUL IF

This type of support may be useful if:

-  Your CRM or email list has become messy
-  Contacts need tags, categories or groups adding
-  You want to separate clients, prospects, suppliers or subscribers
-  You have duplicate or incomplete contact records
-  You need a cleaner list before sending emails
-  You want to follow up with a specific group of people
-  You are not sure who is on which list or why

## WHAT JESSANOL CAN SUPPORT WITH

Jessanol can help with CRM contact lists and segmentation.

This may include:

- Reviewing contact lists
- Updating tags, groups or categories
- Checking for duplicates
- Adding or updating contact details
- Creating practical segments
- Separating contacts by agreed criteria
- Preparing lists for newsletters or follow-up emails
- Flagging missing or unclear information
- Creating a simple list or segment guide

## RECOMMENDED RHYTHM

This can be done as a one-off tidy-up, before a campaign, or as part of regular marketing and CRM admin.

For example:

- Contact list tidy-up before sending a newsletter
- Segment creation before a campaign
- Monthly CRM or email list review
- One-off clean-up of old contacts
- Follow-up list preparation
- Updating tags after events, enquiries or downloads

## ACCESS LIKELY NEEDED

Jessanol will probably need:

- Email inbox access and agreed permissions
- Guidance on priorities
- Examples of common enquiries
- Any existing folders, labels or templates
- Access to any task list, CRM or project area where follow-ups should be recorded

## IMPORTANT CONSIDERATIONS

Before starting, we will agree:

- What list or CRM area needs reviewing
- What the segmentation is for
- Which categories, tags or groups should be used
- What makes someone belong in each segment
- What Jessanol can update directly
- What needs checking before changes are made
- What should happen with duplicates or unclear records
- Whether any contacts should be excluded from marketing communications

Contact information should be handled carefully. Marketing emails should only be sent to appropriate contacts, using the correct list or segment. Missing or unclear information should be flagged rather than guessed.

## STEP-BY-STEP INSTRUCTIONS

1. Confirm which contact list or CRM area needs reviewing.
2. Agree the purpose of the segmentation.
3. Review existing tags, groups, categories or fields.
4. Check for duplicates, incomplete records or unclear entries.
5. Update contacts using the agreed criteria.
6. Create or apply tags, groups or segments where agreed.
7. Flag missing, conflicting or sensitive information.
8. Prepare the list or segment for the agreed communication or follow-up.
9. Save notes on the segmentation approach for future use.

## WHAT YOU NEED TO PROVIDE

To get started, you will usually need to provide:

- Access to the CRM or email platform
- The reason the list needs reviewing or segmenting
- The groups, tags or categories you want to use
- Any rules about who belongs where
- Any contacts that should not be included
- Details of the communication or follow-up being prepared
- Guidance on what Jessanol can update without checking first

You do not need to have a perfectly organised list before asking for support. The work can begin with identifying what is missing, duplicated or unclear.

## WHAT YOU'LL GET BACK

You should have:

- Cleaner contact lists
- More useful tags, groups or segments
- Fewer duplicates or unclear records
- Better prepared lists for newsletters or follow-up
- Clearer visibility of who you are communicating with
- Less time spent manually sorting contacts before every email

If this sounds familiar, we can use this as a starting point to work out what support would be most useful. Contact me: [jane@jessanol.com](mailto:jane@jessanol.com)