

ANALYZE

Intermediate

25 MIN

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Segment a campaign audience by objective and revenue goal.

Have Copilot recommend customer segments based on the campaign's actual objective, instead of reusing last campaign's segments out of habit.

MICROSOFT 365

Excel

WORKS WITH

Copilot

Business Outcome

Campaign messages reaching the audience segments most likely to respond, instead of a one-size-fits-all send.

Workflow Steps

Step 1: State the campaign's actual objective

Excel

Decide whether this campaign is about new-customer acquisition, upsell, or retention before segmenting – the right segments differ by objective, and "everyone" is not a segment.

Step 2: Ask Copilot to recommend segments from the customer data

Copilot in Excel

Give it the objective and revenue goal alongside the customer dataset, and ask for segment recommendations with the specific signal behind each one.

PROMPT

Our objective is upsell revenue from existing customers this quarter. Using this customer usage data, recommend 3 segments most likely to convert, and state the specific signal behind each recommendation.

Step 3: Sanity-check a segment against known accounts

Excel

Filter the Table to just one recommended segment, pick three or four accounts you know personally from that list, and check whether the stated signal genuinely applies to them.

If an account you know hasn't touched the product in months shows up in a "highly engaged" segment, that's a sign the underlying data or the Copilot's read of it needs a second look.

Step 4: Hand segments to whoever builds the campaign content

Excel

Pass the segments and their defining signals to content, not just a list of names — the signal is what should shape the message.

✓ Check the work

- Each segment's defining signal is stated explicitly, not just a label.
- A manual spot-check against known accounts confirms the logic holds.
- Segments map clearly back to the stated campaign objective.



Expected Outcome

A set of recommended customer segments, each with the data signal behind it, ready to feed into the campaign's content plan.

Want help rolling this out across your team? **Go to Liminals.Tech** ■