The Routine Segments

BLANK WORKSHEET **Brand:** _____ **Date:** _____ **By:** _____

A small set of customer groups, each with its own rhythm. Fewer, clearer groups beat dozens of segments nobody maintains.

WHAT IT IS

A short list of segments based on where a customer is in their routine with your brand: new, first-time, repeat, gift, lapsing and engaged non-buyers.

HOW TO USE IT

1. Start with six or fewer groups. 2. Write each rule so anyone can rebuild it. 3. Set a sending rhythm and a limit. 4. Say what success looks like. 5. Check size monthly.

RULES OF THUMB

Each segment needs a different message. If two segments get the same email, merge them. If a segment is empty or tiny, drop it.

Test each segment before you keep it

DIFFERENT MESSAGE?	BIG ENOUGH?	EASY TO REBUILD?	HAS AN OWNER?
Would they get something different from the others?	Large enough to learn from?	Could a new teammate build it from the rule alone?	Does someone check it each month?

If any answer is no, fix or remove the segment.

Your segments

Write each rule in plain words and in your platform's terms. Sample size shows how to record current counts.

SEGMENT	RULE	SIZE	MAIN MESSAGE	SUCCESS SIGNAL

Sending rhythm

Set how often each segment hears from you, and when to pause or move them on.

SEGMENT	SEND DAYS	MOST PER WEEK	PAUSE RULE	EXIT RULE

Action plan and review rhythm

Turn what you found into a short list. Fix the highest impact items first, and give every item an owner and a date.

#	ACTION	LINKED FINDING	EFFORT	IMPACT	OWNER	DUE
1						
2						
3						
4						
5						

Review rhythm

MONTHLY
Check sizes and rules. Remove any segment that is empty.

QUARTERLY
Run the four tests on every segment.

AFTER A PLATFORM CHANGE
Rebuild and compare counts before sending.

Next: the Revenue Ceiling Worksheet shows what each segment could be worth.