

How to Use the Audience Builder

Market: Federal/State/Local, House, Senate

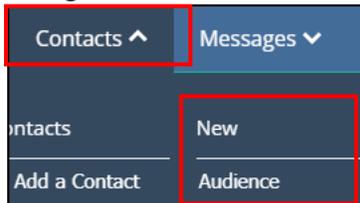
Module: Contacts

Purpose: This guide provides instruction on how to create an audience list using contact records in IQ.

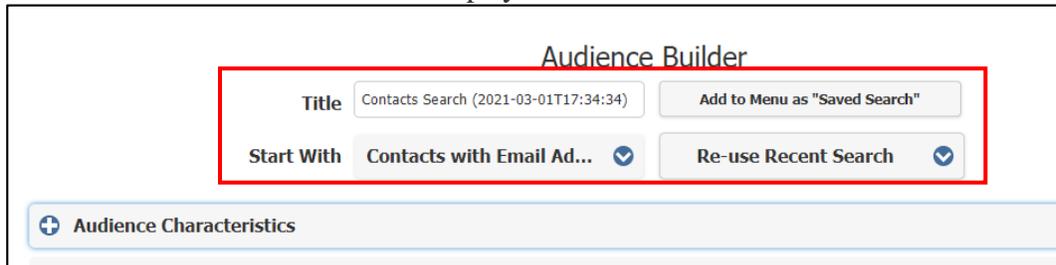
Key Benefits

The Audience Builder feature is used to create an audience list using contact records in IQ that is based on specific characteristics and attributes. As a result, a more targeted audience is created and can be used for specific outreach activities, correspondences, and reports.

1. Navigate **Contacts > New > Audience**.

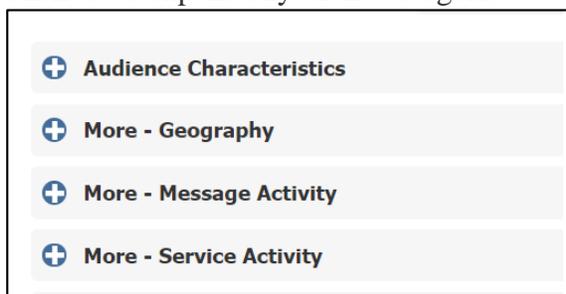


2. The **Audience Builder** feature is displayed.



- Title:** Modify the title, as needed.
- Start With:** Select the appropriate attributes to create the baseline of this audience.
- Add to Menu:** After defining search criteria click this option to add this audience list as part of the Favorites Searches in IQ.
- Re-Use Recent Search:** Click this option to use recently created lists.

3. Click + to expand any of the categories.



4. Select the attributes to **Include** at the left column and **Exclude** at the right column.

A best practice under **Audience Characteristics** is to select the affiliation code **Deceased** in the **Exclude** field.

The screenshot shows the 'Audience Characteristics' section. Under 'Affiliations', there are two search fields. The left field is labeled 'Include' and is empty. The right field is labeled 'Exclude' and contains a dropdown menu with the selected item 'DECEASED - Deceased'. This dropdown menu is highlighted with a red rectangular box.

A best practice under **Geography** is to select the appropriate congressional district in the **Include** column to avoid sending unsolicited outreach to contacts outside of the appropriate district.

The screenshot shows the 'More - Geography' section. It includes three filter groups: 'Apply To' with buttons for 'All Addresses', 'Primary Addresses', and 'Preferred Only'; 'Address Type' with buttons for 'Either', 'Home Only', and 'Business Only'; and 'Congressional District' with a text input field containing 'NY09'. The 'Congressional District' field and its label are highlighted with a red rectangular box.

5. Expand the **Search Rules** category.

The screenshot shows the 'Search Rules' section. It contains four settings: 'Combine Entries With' with 'And' selected over 'Or'; 'Case Sensitive' with 'No' selected over 'Yes'; 'Wildcard Character' with an asterisk (*) selected; and 'Delimiter Character' with a comma (,) selected.

a. **Combine Entries With:**

- **And:** This option will use **all** search criteria defined in previous sections.
- **Or:** This option will use **any** search criteria defined in previous sections.

b. **Wildcard Character:**

- Defaults to an asterisk (*)
- Used to perform a partial match.

6. Click **List Size** to determine the number of contact records based on the criteria.
7. Click **Search** to view the list of contact records based on the criteria.

