Create user segments for better targeting

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About User Segments

A user segment is a set of filter conditions to target a specific user group. There is a standard set of attributes that you can use as default. Additionally, you can enrich user profiles using custom attributes and use these within user segments.

This article highlights

- the benefits
- requirements
- steps to set up a User Segmentation
- further considerations

Why Use User Segmentation

- **Targeted Marketing** - Improve campaign relevance and boost conversion rates.
- **Enhanced Customer Experience** - Tailor experiences for different groups.
- **Higher Conversion Rates** - Focus on segment-specific pain points.
- **Efficient Resource Allocation** - Prioritize efforts for high-value segments.
- **Data-Driven Decision Making** - Gain insights for informed decisions.
- **Personalization at Scale** - Automate personalized content delivery.

Requirements

Administrator or Moderator role is needed.

Steps to Set Up User Segmentation

1. **Concept Development**: Create a logical segmentation concept.
2. **Profile Enrichment**: Inform developers to enrich custom attributes.

*Userlane Snippet*

Your developers need to adapt the snippet to share the relevant information with Userlane.

*Browser Extension*

You import additional attribute values manually as described in this article.
For SSO: Your developers need to adapt the SSO (Single Sign-On) integration to share the relevant information with Userlane as described here.

ℹ️ Important

- Send your developers the articles mentioned above about the technical implementation.
- Send them your segmentation concept. The concept should include all the data that you want to use.
- Ask for the “key” / “name” and “data type” they will use in the implementation. You’ll need this to create or identify the attributes later.

3. Attribute Creation: Create required attributes in the Userlane Portal unless they are auto-created during manual user import.

Please note that attributes can’t be deleted or type-changed.

4. Segment Creation: Build user segments.

You can build a Segment based on

- standard data
- User behaviour
- attributes

ℹ️ Good to know

You can combine conditions using AND or OR to create user segments.

Example:

You can create a segment with users who are admins OR paying users AND have been active within the last 14 days.

5. Segment Application: Target content and analyze data.

You can apply a Segment in the Portal (for Guides, Chapters, Messages) and in the Editor (Tooltips, Tags).

Further Considerations

- Direct links or integrated guides ignore segments.
- Create test segments before going live for in-depth testing.
- Applying a Segment to a chapter affects all Guides.
- Applying a segment to a single Guide in a chapter adds additional conditions.
- To see a specific user's profile, create a segment with their customer user ID and open their profile from
Examples of Segmentation

1. **User Roles**: Segment content at chapter level.
2. **Departments**: Segment single content items.
3. **Purchased Package / Features**: Organize by packages or segment Guides.
4. **Trial Status**: Create chapters for trial and converted users.
5. **New Users**: Add extra chapters and content for them.

User segmentation optimizes content delivery based on user attributes and behaviors.