

# User segments for better targeting

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## About User Segments

User segments are an important and powerful tool you can use to filter Userlane analytics as well as target your content to specific audiences.

Userlane provides a standard set of attributes you can use to create user segments but you can also enrich user profiles with custom attributes and utilize those for user segments.

In this article we'll cover:

- the benefits of user segmentation
- using custom attributes
- creating user segments with AI
- creating user segments manually
- further considerations

## Why Use User Segmentation

- **Data-Driven Decision Making** - Filter HEART analytics with user segments for more precise data.
- **Enhanced User Experience** - Tailor experiences for different user groups.
- **Efficient Resource Allocation** - Prioritize efforts for high-value segments.
- **Personalization at Scale** - Automate personalized content delivery.
- **Targeted Marketing** - Improve campaign relevance and boost conversion rates.
- **Higher Conversion Rates** - Focus on segment-specific pain points.

## Using Custom Attributes for User Segmentation

Userlane provides you with behavioral data out of the box that can be used for user segmentation (read more on that [here](#)), but user segmentation becomes even more powerful when you enrich user profiles with custom attributes.

### Browser Extension (BX) Implementation

#### SSO

When configuring a Single Sign-On (SSO) integration, you can opt to send additional attributes to Userlane. These attributes are then sent automatically to Userlane from your Identity Provider (IdP) for each user. Find more info [here](#).

Attributes that are commonly sent via SSO are:

- country
- department
- mail
- userType
- jobTitle

You can find SSO created attributes in Userlane on the 'company attributes' page and they can automatically

be used for user segmentation.

You can also import additional attribute values manually as described in [this article](#).

Note that you must be an Administrator or Moderator in order to create and edit user segments.

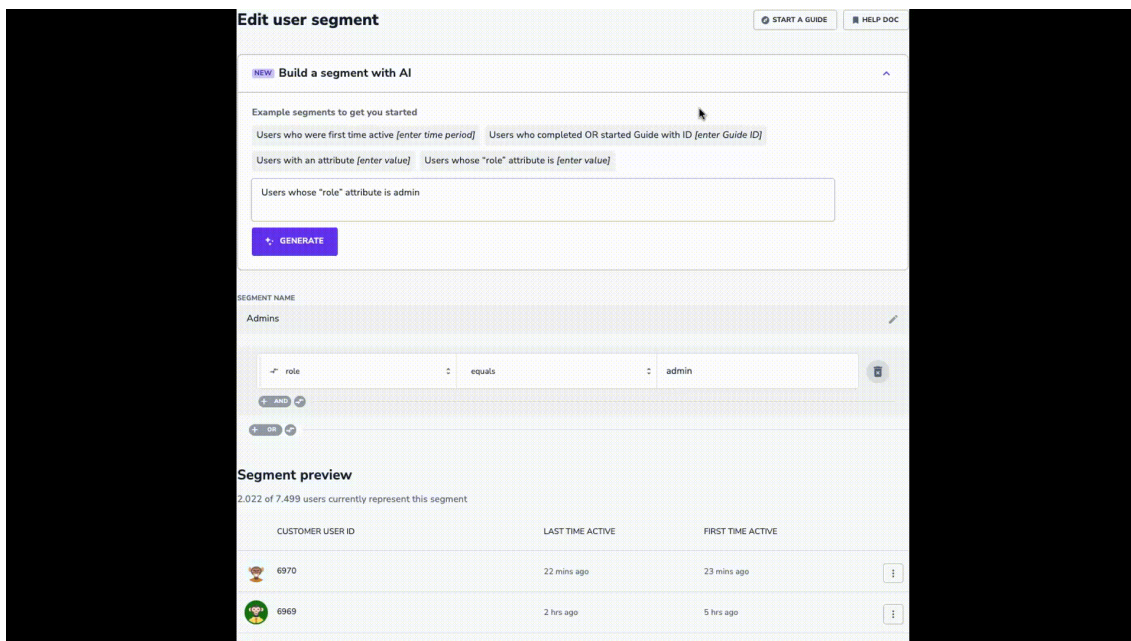
## Snippet

Your developers can pass custom attributes via the Userlane .js snippet using the 'identify' command. Find more info [here](#).

To use custom attributes from the .js snippet in user segmentation, you must first create the attribute on the 'attributes' page in the Userlane Portal.

## Leverage AI to create User Segments

We implemented a conversational AI interface to help you create user segments faster and easier. Using natural language, you can describe the attributes and logical connections you want in your user segment. The AI does the hard part and you simply need to review, save, and apply the segment once it's done.



We provide example segments to get you started in our AI interface so that you can easily create user segments using the most common standard and custom attributes. Note that examples for the 'role' and 'country' attributes will only appear if you use those attributes in Userlane.

When utilizing the AI to create a segment based on Guide Interaction, be sure to use the Guide ID so that the AI knows exactly which Guide you're referring to. To find your Guide ID navigate to the Edit Guide page.

## Create User Segments Manually

### Choose data:

You can build a Segment based on

- standard user data

- user behavioral data
- custom user attributes

### Choose a connection type:

There are various ways to segment and target your users. With **User ID** and any **attribute** you can choose between these connection types:

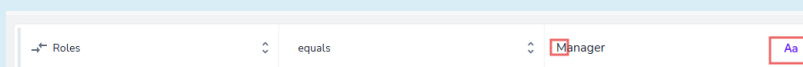
Connection Type	Logic	Example
<b>Equals</b>	Checks for an exact match of the input.	Role equals "admin" results in a segment of all users with the value "admin" for the "role" attribute.
<b>Does not equal</b>	Checks for values that are not an exact match of the input.	Role does not equal "admin" results in a segment of all users where the "role" attribute is anything but "admin".
<b>Starts with</b>	Checks for values that start exactly as the input.	Role starts with "admin" results in a segment of users where the "role" attribute has values like "admin", "admins", or "administrators".
<b>Contains</b>	Checks for values where the input is present.	Email contains "userlane" results in all email addresses where "userlane" is present.
<b>Does not contain</b>	Checks for values where the input is not present.	Email does not contain "gmail" results in all email addresses that do not have "gmail" present.
<b>Is one of</b>	Checks for values that match the input in a set of specified set of values.	Id is one of "123", "456", "789" results in a segment of users with one of those ids.
<b>Is not one of</b>	Checks for values that do not match the input in a set of specified set of values.	Id is one of "123", "456", "789" results in a segment of users without those ids.
<b>Is empty</b>	Checks for values that are empty for the given attribute.	Country is empty results in a segment of users where the country attribute has no value.
<b>Is not empty</b>	Checks for values that are not empty for the given attribute.	Country is empty results in a segment of users where the country attribute has any value.

**Apply the Segment:** Filter analytics and target content.

To use a user segment to filter analytics, select the segment you want to use a filter from the dropdown that says 'Everyone' by default on the analytics pages.

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

**i** If your attribute values are case-sensitive, activate the case-sensitive-button in the segment creator:



Case-sensitivity means that Userlane treats uppercase and lowercase letters as different characters, so "Manager", "manager", and "MANAGER" would be considered three distinct words.

## Further Considerations

- Direct links or integrated Guides do not follow user segments.
  - Create test segments before going live for in-depth testing.
  - Applying a segment to a Chapter affects all Guides.
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