How to create a solid targeting concept

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Why use it

Use targeting to

- target specific user groups for your Userlane content based on their roles and accesses
- create a personalized user experience
- increase adoption of key features and processes
- collect more meaningful feedback
- continuously improve content effectiveness

How it works

Targeting depends mainly on the information you have about your users. The more data you have the more granular you can target your users.

This data is passed via SSO or via the Snippet and can then be applied consistently across all Userlane content types.

Targeting rules should be defined once and reused across content wherever possible, ensuring a consistent experience for each user group.

Follow these steps to create a good concept to target your users:

1. Analytics

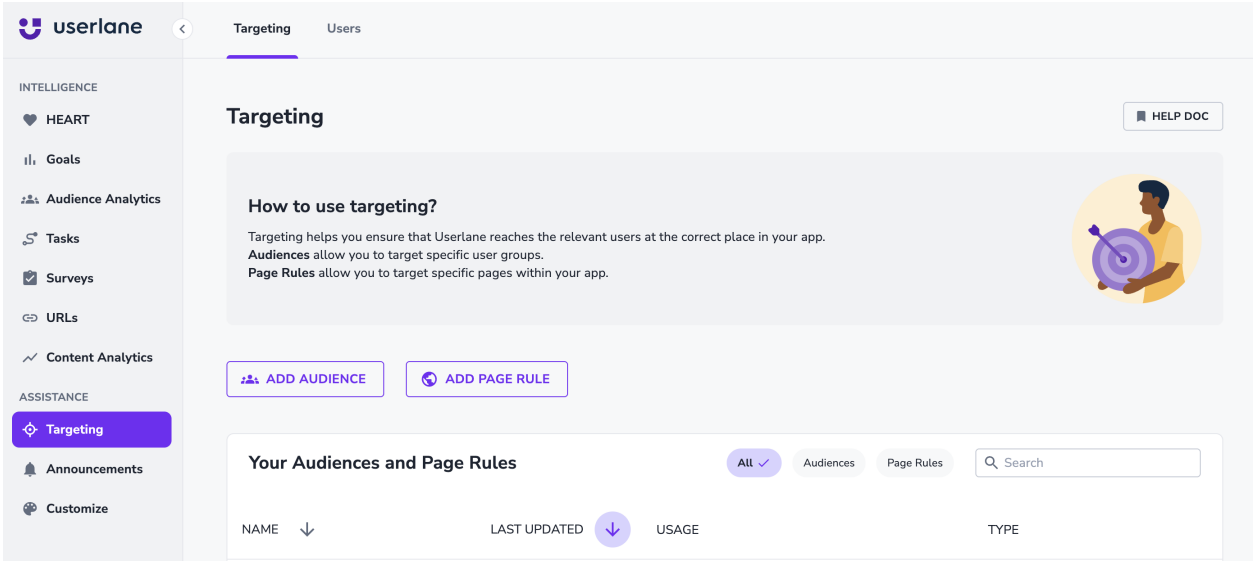
- What insights would help you drive engagement and processes?
- How do you differentiate users in reports or conversations?

2. Groups and characteristics

- How do you differentiate users within your application already?
    - Collaborate with your developers regarding the targeting concept to ensure relevant attributes are considered and keys/names are consistently used and set up. Learn more about it here.

3. Set up your Target Audience

- Set up your attributes in the Portal, if applicable.
- Create your Audiences here:



> **i Good to know**
>
> You can combine conditions using AND or OR to create Audiences.
>
> *Example:*
>
> *You can create an Audience with users who are admins OR paying users AND have been active within the last 14 days.*
>
> Applying an Audience to a chapter affects all Guides in that chapter.
>
> Applying an Audience to a single Guide in a chapter adds additional conditions.

4. Content

- Do most of the users fulfill similar processes? Is there any data in forms that some users have to fill out differently than others? Or are there many parts that are only used by specific groups?
- You can target single content items or whole chapters in case of managing Guides within the Assistant. What content is relevant to what group?

Examples

User roles

- Relevant if you have different user roles (e.g., administrator, regular user) in your rights management system.
- Recommended targeting: Often used for Guide content at the chapter level.

Departments

- Relevant if users from different departments use the software differently or have varying information requirements.
- Recommended targeting: Apply targeting to single content items as there may be shared and department-specific content

Purchased package / Feature sets

- Relevant if you offer different product versions with varying features
- Recommended targeting: Organize Guides in chapters based on purchased packages or target single Guides based on included features. Target other content items individually

Trial status

- Relevant if your product has a trial period
- Recommended targeting: Create different chapters for trial and converted users

New users

- Relevant if your application frequently encounters new users who require additional onboarding
- Recommended targeting: Add an extra chapter and targeted content items for new users