

# Creating a solid segmentation concept

Learn how to create a solid concept to personalize your users' experience through segments in Userlane.

If you have different groups of users that have different levels of access within your platform or who use different functionalities, then you would want them to see only the Guides that are relevant to them.

Segmentation will allow you to divide your users into different groups, and show them only the Guides that are relevant to them, providing them with a more personalized onboarding experience.

This article will help you to create a logical and coherent concept on which to base your segmentation.

## How it works

The segmentation depends mainly on the information you have about your users. The more data you have the more granularly you can segment your users.

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

### **1. Define groups and the characteristics that set them apart:**

Think about your groups of users and the information that you normally gather about them in your application (e.g. trial/paying, last login, etc.).

Do you have enough? Do you need extra information?

If you think you need more information talk with your developers to see if this is possible to do.

### **2. Decide which Guides are relevant for everyone and which ones are specific to certain groups:**

Is most of your application important to the majority of your customers? Or are there many parts that are only used by specific groups?

You can segment single Guides or whole chapters. How do you know what would work best for you?

### **Here you have some ideas (based on segmentation):**

*User roles:*

- Relevant if: you have a rights management system with different user roles such as administrator, regular user, etc.

- Recommended segmentation: chapter level

*Departments:*

- Relevant if: users from different departments use your software differently
- Recommended segmentation: there is probably a greater overlap between the Guides required for the different user groups. Hence, it is often easier to apply the segmentation to single Guides

*Purchased package / Feature sets:*

- Relevant if: you sell different versions of your product with different feature sets
- Recommended segmentation: if you organize the Guides in chapters based on the purchased package, then chapter level. If the overall chapter structure stays the same for every package but depending on the included features, a user might need more or fewer Guides, then segment single Guides.

*Trial status:*

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

As a final piece of advice, we recommend starting with a broader segmentation and then refine the segmentation based on the analytics and the feedback of your users. This would mean that you start just using chapter segmentation and only then continue to refine your segmentation applying it to single Guides within those chapters.

## Considerations

- You can connect different conditions for your user segment with AND or OR. This also allows you to create nested conditions. For example, you can create a user segment that contains all users that are admins OR paying users AND that are 'first time active' within the last 14 days.
- When a specific segment is applied to a chapter, this segmentation will affect all Guides within this chapter. If you apply another segment to a single Guide in this chapter, those conditions will apply additionally.

**Need more help?**

