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.

> **i Important**
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> - 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 (for Snippet implementation only)
- tags (for Snippet implementation only)

> **i Good to know**
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> You can combine conditions using AND or OR to create user segments.
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> *Example:*
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> *You can create a segment with users who are admins OR paying users AND have been active within the last 14 days.*

4.a. Choose a connection type:

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

- **"Equals":** Checks if a value is equal to another.
  - *Example: Target only the user with "123" ID*
- **"Does not equal":** Checks if a value is not equal to another.
  - *Example: Target all the users that are not the "123" user, so both "456" and "789" would be targeted*
- **"Starts with":** Checks if a value starts with a specific sequence of characters.
  - *Example: Target only US locations whose attribute starts with "US", so the "US-123" will be targeted.*
- **"Contains":** Checks if a value contains a specific sequence of characters.

- - *Example: Target only the attribute that contain the word "manager", so that both "a-region-manager" and "b-region-manager" would be targeted*
  - **"Does not contain":** Checks if a value does not contain a specific sequence of characters.
    - *Example, exclude all users that have a "manager" role in their attribute*
  - NEW: **"Is one of":** Checks if a value matches any one of a set of specified values. "111" is one of ["111", "222", "333"]
    - Example, use this to quickly paste in one field all the User IDs you want to target. For example, target only exact these 3 users or attributes - "111", "222", "333".
  - NEW: **"Is not one of":** Checks if a value does not match any one of a set of specified values.
    - Example, target all but exclude these 3 users - "111", "222", "333".

Remember to use **commas** between different values for both "**Is one of"** and "**Is not one of"** connection types.

- - **"Is empty":** Checks if a value is empty
    - *Example: Target all users that have an empty "location" attribute*
  - **"Is not empty":** Checks if a value is not empty.
    - *Example: Target all users that have some value under the attribute "feature XZY"*

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 the segmentation builder.

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.