

## Segmenting Your Users

Download our guide to this worksheet to learn more about how to segment your users:

[heap.io/resources/ebooks-whitepapers/segmenting-your-users](https://heap.io/resources/ebooks-whitepapers/segmenting-your-users)

Use the following frameworks to identify your key user groups and track their behavior.

### Phase 1: Building segmented dashboards

**Start by defining what success looks like for the part of the product you're investigating.**

What event(s), when performed, indicates that a user has accomplished the task you care about?

**What event(s) count as success for your product, feature, or user flow?**

**Next, make a list of the primary segments that apply to your business.**

Below is a list of common user segments across industries and user types. Feel free to use these as a guide, or to choose other segments that are relevant for the business results you or your team is interested in.

<p><b>SaaS</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Number of logins</li> <li><input type="checkbox"/> Time spent in the app</li> <li><input type="checkbox"/> Product adoption</li> <li><input type="checkbox"/> Specific feature usage</li> </ul>	<p><b>eComm</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Average order value (AOV)</li> <li><input type="checkbox"/> First-time visitors</li> <li><input type="checkbox"/> Repeat shoppers</li> <li><input type="checkbox"/> Guest shoppers</li> </ul>	<p><b>FinServ</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Application stage</li> <li><input type="checkbox"/> Single vs. multiple policy holders</li> <li><input type="checkbox"/> Returning customers</li> </ul>
<p><b>Demographics</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Age</li> <li><input type="checkbox"/> Gender</li> <li><input type="checkbox"/> Education</li> <li><input type="checkbox"/> Location</li> </ul>	<p><b>Technographics</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Mobile users</li> <li><input type="checkbox"/> Desktop users</li> <li><input type="checkbox"/> 3rd-party tools</li> <li><input type="checkbox"/> Integrations</li> </ul>	<p><b>Firmographics</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Company size</li> <li><input type="checkbox"/> Organization type</li> <li><input type="checkbox"/> Ownership</li> <li><input type="checkbox"/> Growth trends</li> </ul>

List the segments you'd like to include in your dashboard.

**Confirm here that you've set up your segmented dashboard**

**Review weekly to monitor progress.**

List the trends that you observe and share with your team the insights you uncover.

## Phase 2: Exploratory working session

### **First, make sure your team is aligned on the first step from Phase 1:**

What event(s) count as success for the product, feature, or user flow you're focusing on?

### **Make hypotheses.**

What hypotheses do you have about your most successful users? Have each person list their top 3 hypothesis about the characteristics that your most successful users share.

*Make a list of what you think are the top 3 characteristics that successful users have.*

### **Test your hypotheses.**

Use your analytics tool to test your hypotheses. Group users according to the criteria you're testing, and see what the impact is on success.

*Write down what you find.*

**Explore new ideas!**

Go through the list of characteristics in Phase 1, or come up with some other potential groupings to test. Each person in the group should identify three potential characteristics.

*List them here.*

**Test and learn.**

Everyone on the team has 20 minutes to dig into the data and try to find something interesting. Did any of these segments reveal anything interesting or unexpected?

*Describe the results here (even if unsuccessful).*

**Next steps.**

What next steps came out of this exercise? Are there any experiments the team should run? Potential areas to investigate?

*Describe next steps here.*

**Unsuccessful users.**

If there's time, explore the characteristics of unsuccessful users. What do they have in common?