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

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.

SaaS	**eComm**	**FinServ**
☐ Number of logins	☐ Average order value (AOV)	☐ Application stage
☐ Time spent in the app	☐ First-time visitors	☐ Single vs. multiple policy holders
☐ Product adoption	☐ Repeat shoppers	
☐ Specific feature usage	☐ Guest shoppers	☐ Returning customers
Demographics	**Technographics**	**Firmographics**
☐ Age	☐ Mobile users	☐ Company size
☐ Gender	☐ Desktop users	☐ Organization type
☐ Education	☐ 3rd-party tools	☐ Ownership
☐ Location	☐ Integrations	☐ Growth trends

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?