

Understand and Build Segments



An Interaction Studio segment is a real-time grouping of accounts or individuals based on a set of criteria you define. Segment updates happen in real-time, so any membership changes occur immediately, even during the same visit.

For example, suppose you are a retailer and want to target users with less than \$100 in their shopping cart to incentivize them to add more products. You can target these users by creating a segment then configure your incentive campaign to show only to users in that segment. Since segment updates happen in real-time, shoppers who end up with more than \$100 in their cart at any point during the same visit would no longer be members of the segment so they would immediately be disqualified from the campaign and would not

see the incentive.

This Section Explains

There are several ways you can use segments to increase the impact of your personalization campaigns:

- **Personalization for campaigns:** you can target segments of visitors with specific personalized content for those groups. For example, you might want to show first time visitors an introductory video about your vision, but not show this the next time they visit your site. You can also use a segment to specify certain actions which can be set as the goal for a campaign. For example, the goal for first time visitors who watch your introductory video is to connect with an advisor by completing a short web form. The segment would specify the actions and would be the goal for that campaign
- **Set goals and filters:** segments can be used to set a global goal. Additionally, you can use segments to filter campaign statistics to see how various groups of users are reacting to a campaign
- **Analytics, trends, and engagement:** you can see trends in a particular segment, view specific visitors or accounts in a segment, or compare data across multiple segments. With Engagement compare, you can compare the segments to other segments and your whole site to see the differences on key metrics and behaviors. You can also filter reports by segments to learn more about a segment's behavior on a deeper level.
- **Analyze member details:** each segment member, either user or account, has a specific details screen that shows behavioral data about that specific individual user or account. You can learn more in [Unified Customer Profile](#)
- **Import or export segment membership:** you can sort and export segment data including any defined segment rules. You can also synchronize segments with your CRM so you can include everything Interaction Studio has captured about a lead, contact, or account

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