

Behavior Based Segmentation

Brief Overview

With WalkMe Behavior Based Segmentation, you can leverage all of your WalkMe analytics data to accurately target your WalkMe content to users and display the right content at the right time.

WalkMe Behavior Based Segmentation allows you to use all the data that WalkMe collects and then define a group of users with certain characteristics, users that performed certain actions or users that have certain attributes, and use it as a segment when building your content.

With this new feature you can easily create a Behavior Based Segment in Insights and use it in the Rule Engine in the Editor.

Note:

This is an enabled feature. Please request access from your Customer Success Manager or WalkMe contact.

Use Cases

- Remind users who have not completed their onboarding tasks in the last 30 days to complete onboarding
- Play Smart Walk-Thru guidance to users who have attempted to use a feature but did not complete the entire process
- Show a ShoutOut only to users who have not used a new feature yet
- Play WalkMe content only to new employees or those within a certain department

Terminology

Behavior Based Segments

- A group of users that match the set of rules that define the Segment, in the chosen date range
 - **Note:** Date range is part of the Segment definition
- **Example:** Users who clicked on ShoutOut A in the last week. This Segment is defined in Insights Classic and later can be used in the Rule Engine in the WalkMe Editor. See “Use a Segment” below

[Rule Engine](#)

Segments

- Segments are defined and managed in the WalkMe Editor
- Once defined, Behavior Based Segments are available as a rule type in the Rule Engine in the Editor

[Segmentation](#)

Segment Run / Calculation

- Behavior Based Segments are calculated every day at 2:00 AM UTC during an offline “Run” that determines the group of users that match the Segment definition
- From the moment the process has completed the Segment will not be updated until the next job run
- **Segments are limited to 10,000 users** - The Segment calculation might fail if the Segment surpasses that
 - **Note:** Since the Insights Users page shows real time data and Behavior Based Segments are calculated once a day, there may be differences between the Segment size and a similar list of users in the Users page

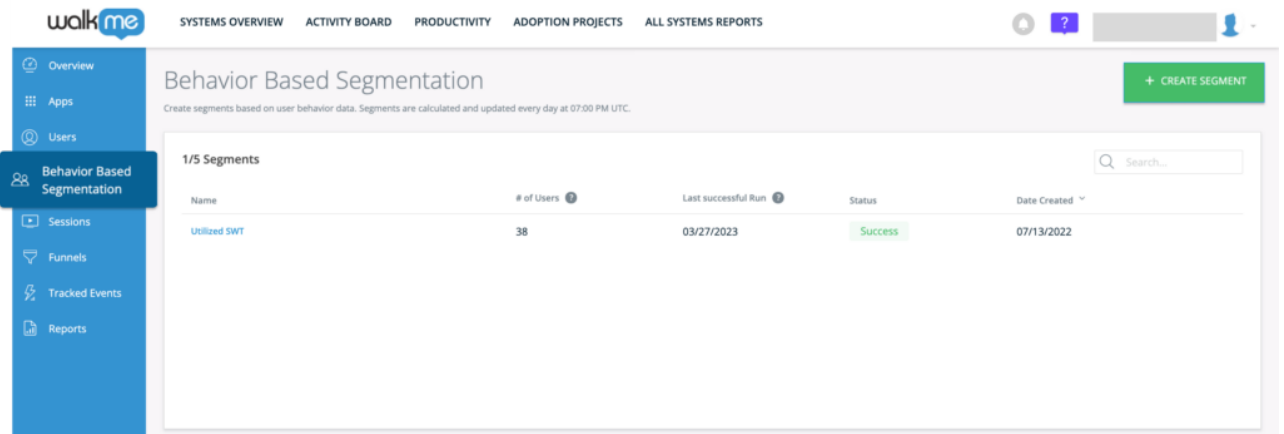
Behavior Based Segmentation Management

- The Behavior Based Segmentation page in Insights allows viewing the current status of all existing Segments and creating a new one
 - **Note:** Only 5 Segments are allowed per system

How It Works

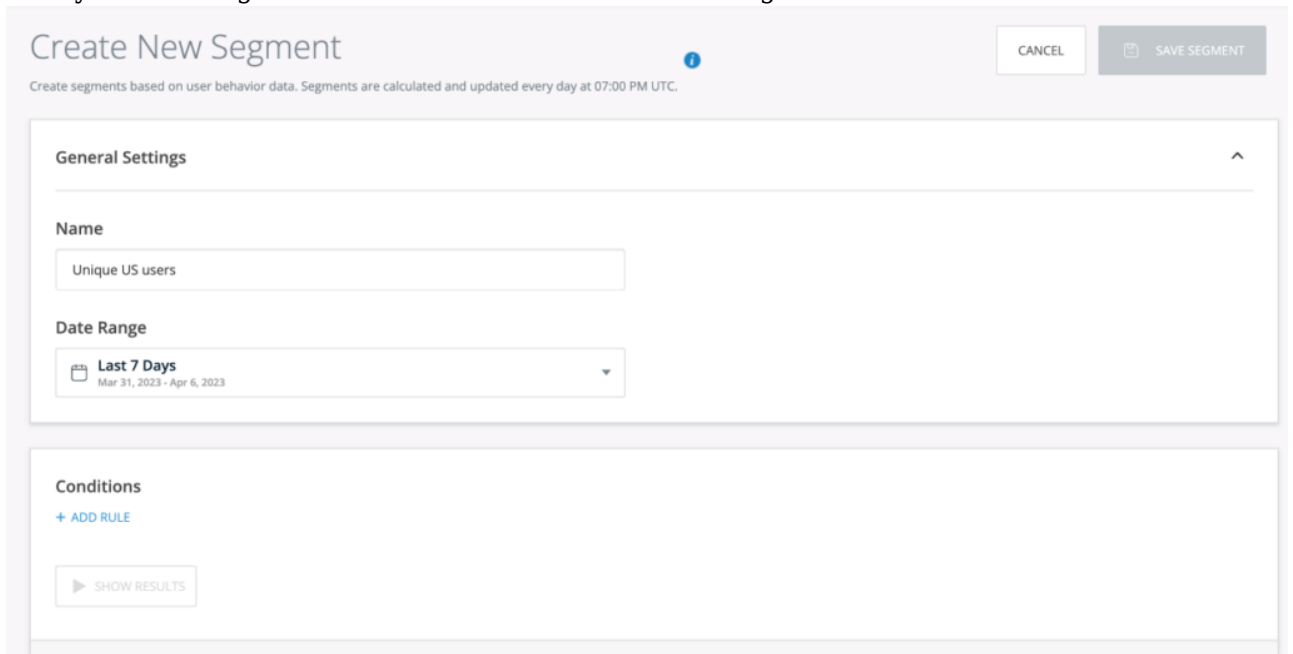
How to Create a Segment

1. Navigate to [Insights](#), at insights.walkme.com
2. Select the system you would like to a segment to from the **Monitored Systems** widget
3. Click the **Behavior Based Segmentation** tab from the sidebar
4. Click the **+ Create Segment** button



Name	# of Users	Last successful Run	Status	Date Created
Utilized SWT	38	03/27/2023	Success	07/13/2022

5. Give your new segment a name and choose the date range that will be used for calculation



Create New Segment

Create segments based on user behavior data. Segments are calculated and updated every day at 07:00 PM UTC.

General Settings

Name

Unique US users

Date Range

Last 7 Days
Mar 31, 2023 - Apr 6, 2023

Conditions

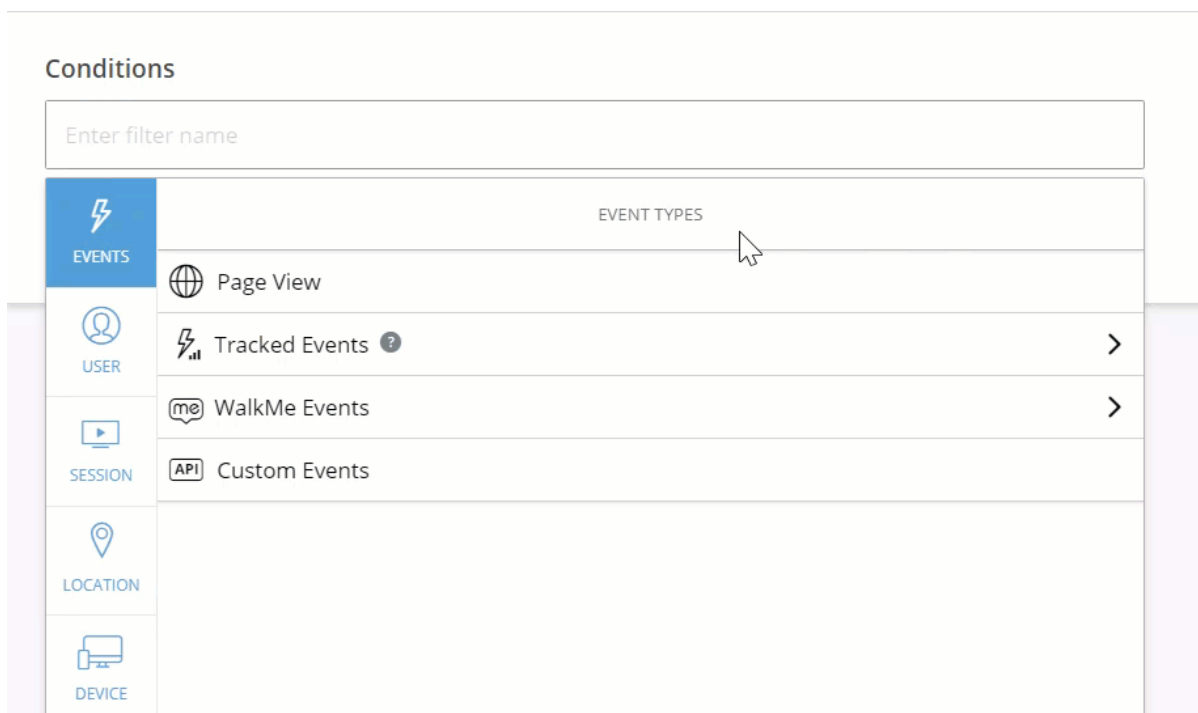
+ ADD RULE

SHOW RESULTS

CANCEL SAVE SEGMENT

6. Add **Conditions** to the segment

- Click **+ Add Rule** to define the rules that will determine group of users that make up the Segment
- Choose from a variety of rule condition types:



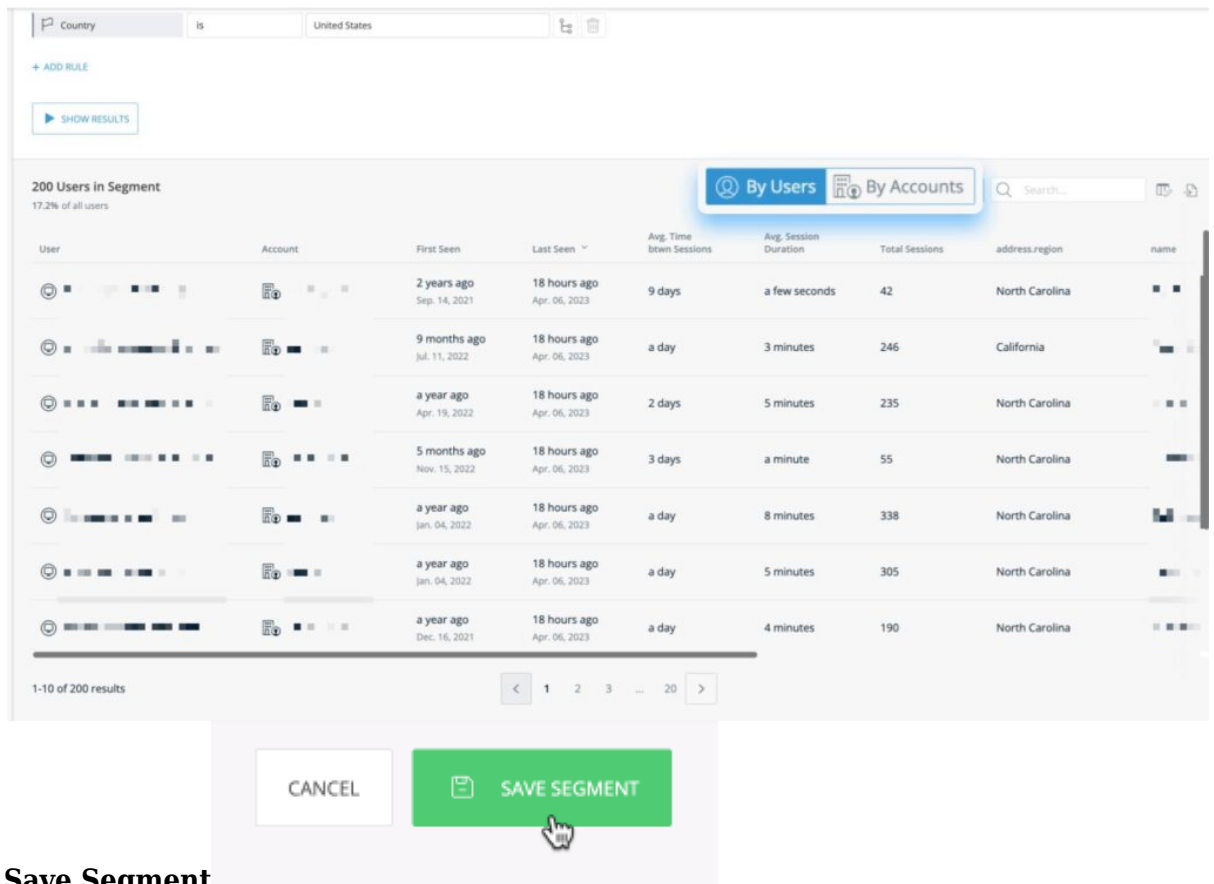
7. After adding rules, you can view the initial segment results in real time by clicking the **Show**



Results button

8. In the upper right corner you will find several options to sort your results:

- **By Users / By Accounts** toggles
- Search bar
- Filter dropdown
- Export button

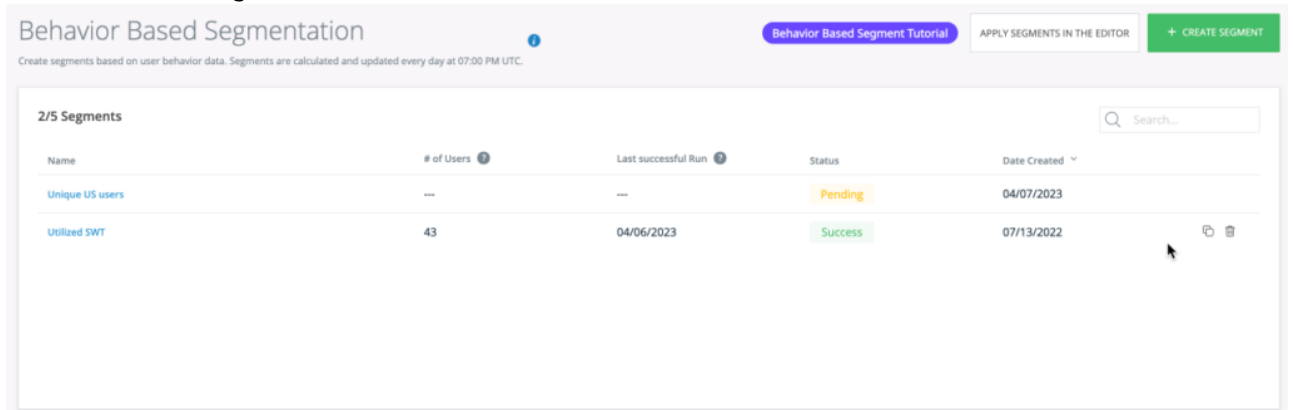


The screenshot shows the '200 Users in Segment' interface. At the top, there's a filter for 'Country' set to 'United States'. Below this is a '+ ADD RULE' button and a 'SHOW RESULTS' button. The main area displays a table of user data. At the bottom, there are 'CANCEL' and 'SAVE SEGMENT' buttons, with a mouse cursor clicking on 'SAVE SEGMENT'.

User	Account	First Seen	Last Seen	Avg. Time Btwn Sessions	Avg. Session Duration	Total Sessions	address.region	name
		2 years ago Sep. 14, 2021	18 hours ago Apr. 06, 2023	9 days	a few seconds	42	North Carolina	
		9 months ago Jul. 11, 2022	18 hours ago Apr. 06, 2023	a day	3 minutes	246	California	
		a year ago Apr. 19, 2022	18 hours ago Apr. 06, 2023	2 days	5 minutes	235	North Carolina	
		5 months ago Nov. 15, 2022	18 hours ago Apr. 06, 2023	3 days	a minute	55	North Carolina	
		a year ago Jan. 04, 2022	18 hours ago Apr. 06, 2023	a day	8 minutes	338	North Carolina	
		a year ago Jan. 04, 2022	18 hours ago Apr. 06, 2023	a day	5 minutes	305	North Carolina	
		a year ago Dec. 16, 2021	18 hours ago Apr. 06, 2023	a day	4 minutes	190	North Carolina	

9. Click **Save Segment**

10. Once you save the segment you will be able to see it on the Behavior Based Segmentation page with the following details:



The screenshot shows the 'Behavior Based Segmentation' page. It has a header with 'Behavior Based Segment Tutorial', 'APPLY SEGMENTS IN THE EDITOR', and '+ CREATE SEGMENT' buttons. Below the header is a table of segments.

Name	# of Users	Last successful Run	Status	Date Created
Unique US users	---	---	Pending	04/07/2023
Utilized SWT	43	04/06/2023	Success	07/13/2022

- **Name:** The segment name defined during creation
- **Number of Users:** The number of users that matched the segment definition in the last successful calculation
 - **Note:** This number is not real time
- **Last successful run:** The date when the segment was last successfully calculated
- **Status**
 - **Pending first run:** The segment calculation has not run since the segment was created

- **Success:** Indicates the segment run was successful
- **Failed:** Indicates the segment run failed
- **Date Created:** The date the segment was created
- **Copy icon:** Duplicate an existing segment and make changes to quickly create a new, similar segment
- **Trash icon:** Delete a segment that is not currently in use

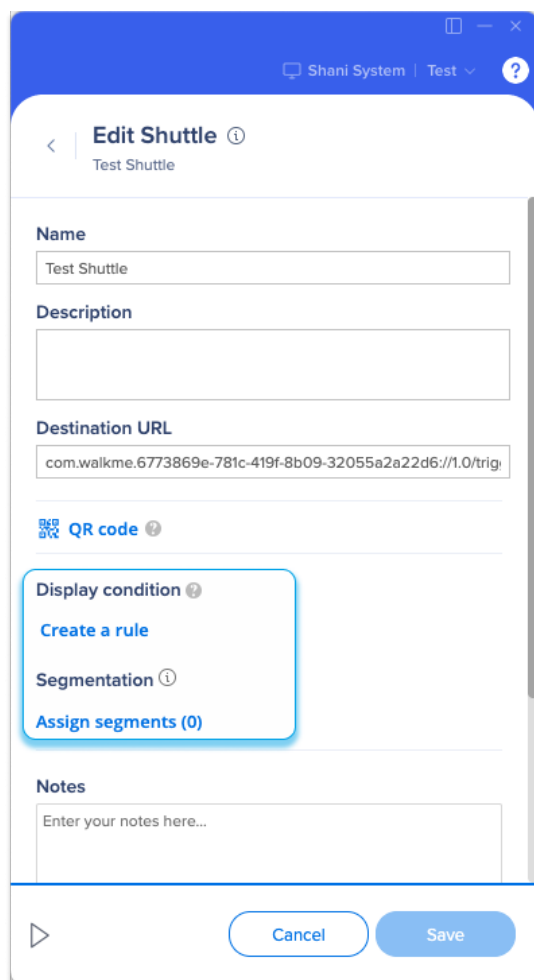
Note

Deletion of a segment is only possible if it is not being used in the Rule Engine. Since a Segment may be in use in the Rule Engine, editing a segment is not allowed. If you need to adjust the segment definition, a new segment should be created.

Using a Segment in the Rule Engine

Once you have successfully created your Behavior Based Segment, you are ready to use it in the WalkMe Editor.

You can use it to create a rule in the [Rule Engine](#), or assign a segment with the Segmentation



Engine.

By Segmentation:

1. Navigate to the WalkMe Editor
2. Click the WalkMe item that you would like to assign a segment to
 1. Or hover over the WalkMe item and click the checkbox to assign a segment
3. Click **Assign segments**
4. Select your Behavior Based Segment

[Segmentation](#)

By Rule Engine

1. Navigate to the WalkMe Editor
2. Click the WalkMe item that you would like to assign a segment to
3. Click **Create a rule**

4. Choose type **Behavior Based Segmentation**
5. Select your Behavior Based Segment
6. Select an operator, either **True** or **False**


[Rule Engine](#)

Example:










- Now you can use this rule in a combination with any other Segmentation rule in the Rule Engine
- You can use this segment with any of the WalkMe content in your Account

Segmentation ?

Create a rule to define this Segment ×

Segment Title: 

Group Import Rules

Select a Type	Select Segment	Exists	
 URL	Show the SoutOut only after a SWT was played		 
 On Screen Element	Pop up a shout out to users who performed actio...		
 jQuery Element	Show the SoutOut only after a SWT was played		
 User Data	Show the SoutOut only after a SWT was played		
 User Attributes	Show the SoutOut only after a SWT was played		
 Current Flow	Show the SoutOut only after a SWT was played		
 Behavior Based Segmentation	Show the SoutOut only after a SWT was played		

Current Statement:

Cancel

Done

Tip Tuesday



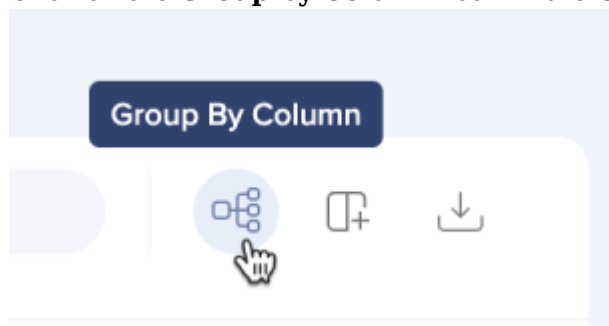
To see more Tip Tuesday videos on WalkMe World [click here](#).

Segment's Attributes in Insights

Once a segment is created it will be available for viewing and filtering in Insights.

You can then check whether a user belongs or does not belong to the segment from the Insights Users page.

1. Click on the **Group by Column** icon in the **Users** page in **Insights**



2. Select the name of your segment to add to the table

Search

Avg. Session Duration	Total Sessions
28 minutes	307
16 minutes	113

Group By Column Clear

Q | Search...

Info (last value)

Country (last value)

City (last value)

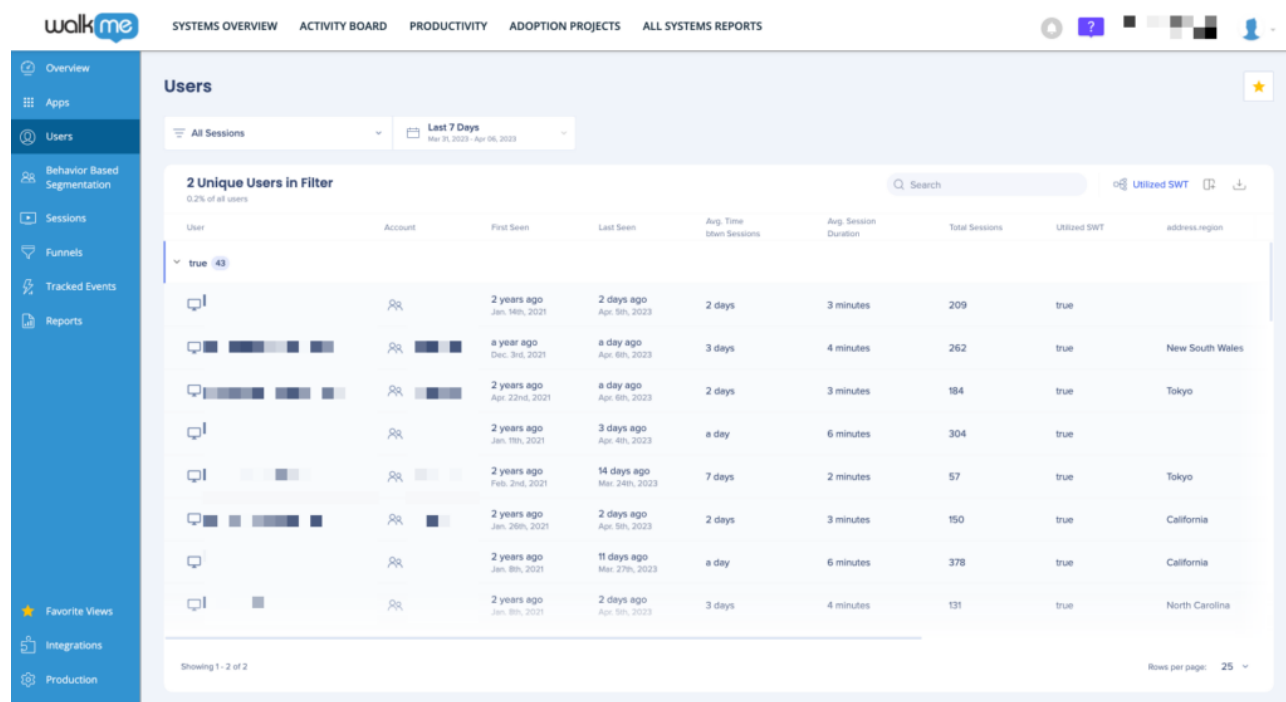
Region (last value)

Browser Name

Browser Version

Didn't complete Survey (BBS)

- You will be able to see whether each user belongs or does not belong to the segment at the time of last calculation by expanding **True** and **False**



















Users

All Sessions | Last 7 Days (Mar 31, 2023 - Apr 06, 2023)

2 Unique Users in Filter (0.2% of all users)

Search | Utilized SWT | Download

User	Account	First Seen	Last Seen	Avg. Time between Sessions	Avg. Session Duration	Total Sessions	Utilized SWT	address.region
		2 years ago Jan. 16th, 2021	2 days ago Apr. 5th, 2023	2 days	3 minutes	209	true	
		a year ago Dec. 3rd, 2021	a day ago Apr. 6th, 2023	3 days	4 minutes	262	true	New South Wales
		2 years ago Apr. 22nd, 2021	a day ago Apr. 6th, 2023	2 days	3 minutes	184	true	Tokyo
		2 years ago Jan. 11th, 2021	3 days ago Apr. 4th, 2023	a day	6 minutes	304	true	
		2 years ago Feb. 2nd, 2021	14 days ago Mar. 24th, 2023	7 days	2 minutes	57	true	Tokyo
		2 years ago Jan. 26th, 2021	2 days ago Apr. 5th, 2023	2 days	3 minutes	150	true	California
		2 years ago Jan. 8th, 2021	11 days ago Mar. 27th, 2023	a day	6 minutes	378	true	California
		2 years ago Jan. 8th, 2021	2 days ago Apr. 5th, 2023	3 days	4 minutes	131	true	North Carolina

Showing 1 - 2 of 2 | Rows per page: 25

Note: Filtering by the “Segment” attribute is not supported – The attribute will not be displayed in the “USER” filter category.

Limitations

- The number of Segments is limited to 5 per system
- Segment size is limited to 10,000 users
- This feature is only available on Production environment
 - Behavior Based Segments are based on Production environment data, and are not compatible with Test environments
- The Segment definition will be calculated during an offline process every day at 7:00 PM UTC
 - Once the process has completed the Segment will not be updated again until the next day
- No history is available for Segments data
- Mobile Web is not supported
 - Mobile web users will not be returned as part of the Segment calculation
 - The Segments user list will not display mobile web users
- Filtering by the “Segment” attribute is not supported
 - The attribute will not be displayed in the “USER” filter category
- There may be cases where users will match a certain segment definition as well as the

opposite definition (for example, users who interacted with SWT X and users who did not interact with SWT X), this is due to Insights supporting only session scope filters