Mobile: What Are Goals and How Are They Used?

Brief Overview

Goals, enabled by the WalkMe Goals API, are useful tools for keeping track of your end-users' behaviors and creating unique experiences for your end-users based on those behaviors.

Goals consist of discrete grouped sets of actions or states that you deem important to track. Your Goals' metrics appear in your Mobile Console's *DASHBOARD* tab and increase the accuracy of your WalkMe Mobile AI tools.

Goals can also be used in Segmentation to better tailor your Campaign to your audience's needs and expectations.

There is no limit to the number of goals you can define in your app.

Use Cases

Goals use cases include the following:

- Expose information about end-user in-app activity to WalkMe Mobile AI to facilitate better AI predictions about your end-users;
- Create segments more closely aligned with your vision of your end-users' behavior within your app;
- Track completion of processes important to your business goals.

Rule Based and API Based Goals

There are two types of goals: API Goals and Rule Based Goals. Each Goal type has advantages and disadvantages, and they can be used side-by-side to meet all needs. Both Goal types can be used inside segments and other Rule Based Goals.

Attributes of Rule Based Goals

- Simpler to create; no developer work required;
- Uses the powerful WalkMe Segmentation engine;

- Cannot contain goal attributes (more information below);
- Analytics appear in *GOALS* tab of *DASHBOARD* area;
- Will only start being tracked once it is defined and activated through the Mobile Console.

Evaluation frequency of Rule Based Goals

In an end-user's session, or in Power Mode's Simulate Mode, Rule Based Goals are evaluated at the highest frequency required, depending on the Rules they include. There are **three levels of Rule evaluation frequency**:

1. **Level 1**: Evaluation occurs once at beginning of the session for Goals that include Rules that cannot change throughout the session;
   - These Rules include "number of sessions," "country", "day of week," "device type," "app version," etc.;
   - If a Goal only includes Rules of these type, they will be evaluated once per session (at its beginning), and whether they were reached or not at the beginning of the session, they will not be evaluated again.
2. **Level 2**: Evaluation occurs during the session until it's true, and then evaluation stops because it remains true;
   - These Rules include "screen was visited," "session time equals <x>," "campaign X was seen," etc.;
   - If a Goal only includes Rules of these type, it will be evaluated every two seconds until reached, after which evaluation will stop.
3. **Level 3**: Evaluation occurs throughout the session, since the rule evaluated is subject to change during session.
   - These Rules include "screen currently shown," "time on current screen," "element is interacted," etc.

Rules Based Goals that include Rule types of mixed frequency level with an *AND* relationship will only be evaluated at the highest frequency if the Rules from the lower frequency levels evaluate to *true*.

For example, consider the following Rule Based Goal:

The above Rules Based Goal is evaluated as follows:

- The Goal will not be reached nor evaluated more than once for users below app version 4.6.0;
- The Goal can only be reached after seeing the campaign "New Feature in Profile ShoutOut";
- For users in app version 4.6.0 and above, once the end-user sees the ShoutOut, the Goal will be evaluated in the highest frequency and considered reached whenever the user interacts with the *Profile save button* element;
- If the Goal only included the first two Rules, it could be reached a maximum of once per session for users in app version 4.6.0 and above.

Rules Based Goals that include rule types of mixed frequency level with an *OR* relationship, will be evaluated at the highest evaluation frequency level.

For example, the Goal below will be evaluated at the highest frequency because it includes a "Screen is currently shown" Rule that can become true multiple times in a single session:

Attributes of API Based Goals

- More complex to create; developer work required;
- Set API Based goals using the SDK API for both iOS and Android devices;
- Can include additional information on end-user behavior by including attributes in the Goal;
  - These attributes can be used to refine segments containing Goals.
- Goals that were reached prior to being added in the Mobile Console will initially have the status *tracked*.

Examples of Goals and Goal-Based Segments

Some examples of Goals and their use cases in segmentation include the following:

Prior to WalkMe Mobile SDK v1.16

- User made purchase:
  - Segment a "Special Offers" Campaign so that it only appears for end-users who have made in-app purchases more than three times.
- User submitted support ticket:
  - Target a support Walk-Thru to end-users who have contacted Support in the past.
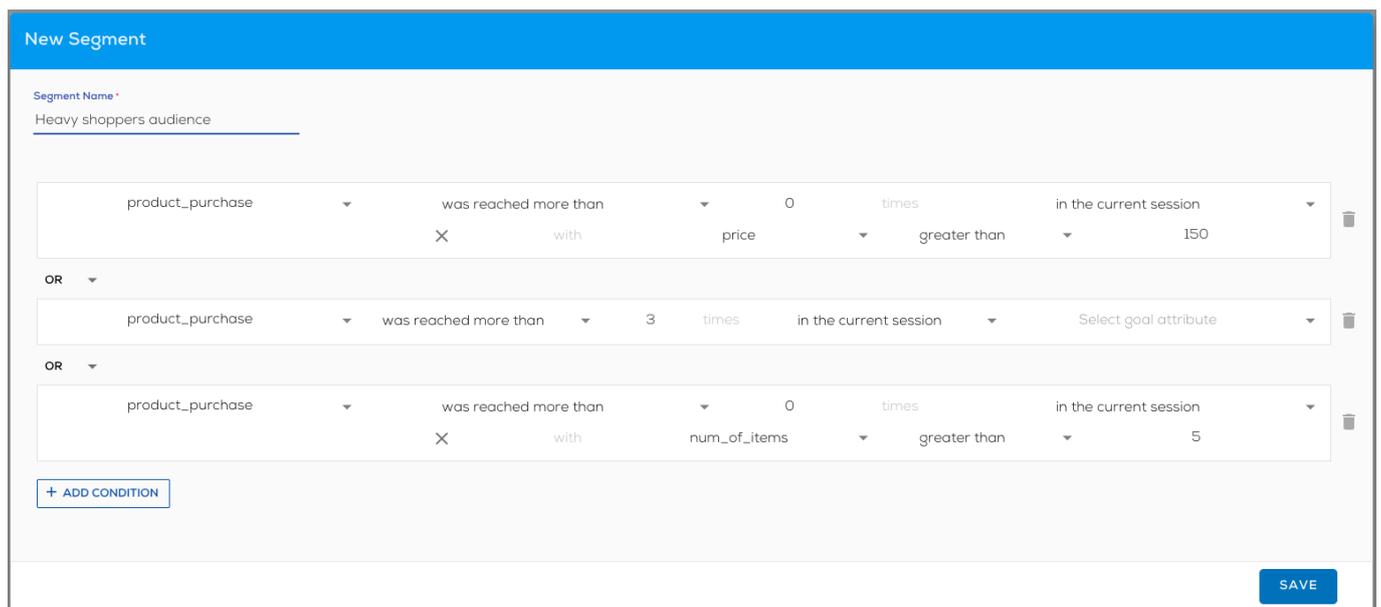- User completed onboarding:

- Prompt adoption campaigns for advanced app features to end-users who have completed the initial setup and onboarding.

With WalkMe Mobile SDK v1.16 and up

You can segment when a Goal was reached and include Goal attributes for refinement.

Some examples include:

- **In any session** (use case example: set a goal for "user set their profile picture" and target all of the users who have done it, regardless of which session they did it in);
- **In current session** (use case example: set a goal for "user purchased an item" and target users right after they reach it to promote delivery upgrades);
- **In previous session** (use case example: set a goal for "user confirmed delivery arrived" and target users on a following session asking for feedback on the purchase).

An example of advanced Goal segmentation using Goal attributes.

Testing and Tracking Goals

Starting from WalkMe Mobile SDK version 1.8.0, you can elect to simulate Goals as part of Power Mode's Simulate Mode. Using this option you can see when Goals are reached in the app and test Rule Based Goals.

In addition, the Tracked column in the Goals screen in the APP SETTINGS section of the Mobile Console will show you when each Goal was last tracked, and in which app version.

Clicking on the date shows you when the Goal was last tracked in any app version where the Goal was active.