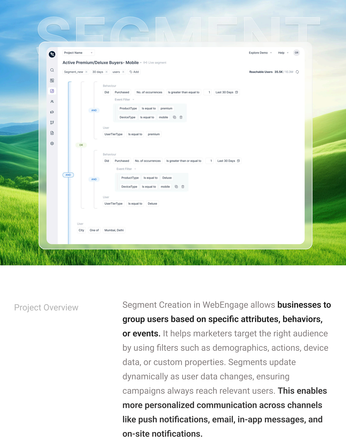


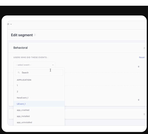
Project Overview

Segment Creation in WebEngage allows **businesses to group users based on specific attributes, behaviors, or events.** It helps marketers target the right audience by using filters such as demographics, actions, device data, or custom properties. Segments update dynamically as user data changes, ensuring campaigns always reach relevant users. **This enables more personalized communication across channels like push notifications, email, in-app messages, and on-site notifications.**

Project	Category	Task
Segment Builder	Automation Marketing	Feature Improvement , UX Research, Testing, UI Design

Research

Through internal feedback from product teams, support teams, and user observations, we identified several usability challenges.

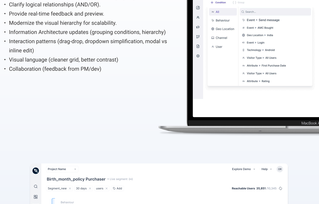


Research Methods
To understand the challenges users faced while creating segments, I conducted lightweight UX research using multiple sources:

- Reviewed customer support tickets related to segmentation issues
- Collected feedback from product managers and customer success teams
- Observed how marketers created segments in the existing tool
- Analyzed competitor segmentation tools to understand common patterns
- These activities helped identify recurring usability issues in the segment creation experience.



Research Findings



Confusion Around Logical Conditions
Many users struggled to understand how AND / OR logic worked while combining multiple conditions. The interface did not clearly communicate how filters were grouped, leading to incorrect segment setups.

High Cognitive Load
The existing layout displayed too many controls and filters at once. Users had difficulty scanning the interface and understanding where to start when creating a segment.

Inefficient Workflow
Creating segments required multiple clicks across dropdowns and nested menus.

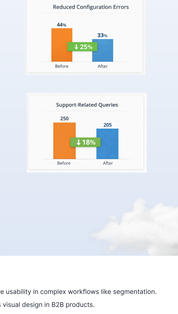
This slowed down the process, especially while building complex segments

Difficulty Using Enriched User Data
Although campaigns collected valuable behavioral data, users could not easily reuse this data to create segments directly.

Users Won't able to create multi level nesting in group

Solutions

- Simplify the workflow for creating and managing segments.
- Clarify logical relationships (AND/OR).
- Provide real-time feedback and preview.
- Modernize the visual hierarchy for scalability.
- Information Architecture updates (grouping conditions, hierarchy)
- Interaction patterns (drag-drop, dropdown simplification, modal vs inline edit)
- Visual language (cleaner grid, better contrast)
- Collaboration (feedback from PM/dev)





Impact

faster campaign setup through simplified workflow

Simplicity meets Control & analysis

↑36%

Faster Segment Creation

The simplified UI and improved condition builder helped users create segments more efficiently.
- Reduced segment creation time by ~35%.

Improved Logical Clarity (AND/OR conditions)

Clear grouping and better visual hierarchy made segment logic easier to understand.
- Reduced configuration errors by ~25%.

Reduced Support Requests

A cleaner workflow and better hierarchy reduced confusion around complex segmentation rules.
- Decreased support-related queries by ~18%.

Learnings & growth

Even small interaction changes can greatly improve usability in complex workflows like segmentation.
Structuring information properly is as important as visual design in B2B products.
Iterative feedback from stakeholders helped refine the experience and improve clarity.