



## Getting Started

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## Understanding business goals and use cases

Segment supports 25 use cases, organized into 4 main business goals:

- Optimize advertising
- Personalize first conversion
- Boost retention, upsell, and cross-sell
- Personalize communications and product experiences

These goals represent key ways businesses often use customer data for improved performance and growth.



Looking for a technical breakdown of each use case? View the [Use Cases Reference](#).

## Selecting your use case

Follow these steps to identify which use case to implement:

- 1 Identify your primary business challenge or goal from the four business goals.

- Review the use cases associated with that goal, considering how each aligns with your specific needs.
- Evaluate your current data collection capabilities and the resources you have available.
- Consider your long-term business strategy and how different use cases might support your future goals.
- If you're unsure, start with a use case that addresses your most pressing current need.

The use case you select will guide your Segment setup, including the events you'll track and the integrations you'll implement. However, Segment's flexibility allows you to adapt and expand your strategy over time as your business needs evolve.

The following sections explore each business goal and associated use cases in detail.

## Optimize advertising

The **Optimize advertising** business goal focuses on improving the efficiency and effectiveness of your advertising efforts. By using your customer data effectively, you can create more targeted campaigns, reduce wasted ad spend, and increase your return on investment (ROI).

Key considerations for this goal:

- Are you looking to expand your customer base with similar high-value customers?
- Do you need to drive app installations?
- Are you trying to increase signups or prevent cart abandonment?
- Do you want to retain high-value customers or optimize your ad spend?

Use cases in this category include:

USE CASE	DESCRIPTION
Build high-value lookalikes	Identify and target potential customers who share characteristics with your most valuable existing customers.
Build lookalikes for app install	Find potential users who are likely to install your app. This is particularly useful for mobile app businesses looking to efficiently grow their user base.
Increase signups with lookalikes	Target potential users who are likely to sign up for your service, based on the characteristics of your existing registered users.
Mitigate cart abandonment	Identify users who have abandoned their carts and create targeted campaigns to encourage these users to complete their purchases.
Mitigate high value churn	Focus on identifying high-value customers who are at risk of churning and create targeted campaigns to retain them.
Suppress based on time	Optimize your ad spend by suppressing ads to users who have recently converted or interacted with your brand, preventing unnecessary ad exposure.
Suppress with purchase	Focus on suppressing ads to users who have recently made a purchase.

## Personalize first conversion

The **Personalize first conversion** goal focuses on optimizing the initial interactions a potential customer has with your brand. By personalizing these early touchpoints, you can increase the likelihood of converting prospects into customers.

Key considerations for this goal:

- Are you looking to increase app installations or user sign-ups?
- Do you want to improve your onboarding process?
- Are you trying to convert free users to paid subscribers?

Do you need to reduce cart abandonment rates?

Use cases in this category include:

USE CASE	DESCRIPTION
Accelerate app install	Focus on optimizing the user journey to encourage app installation.
Accelerate onboarding	Create a personalized onboarding experience once a user has signed up or installed your app.
Accelerate signup	Optimize the signup process, reducing friction and personalizing the experience to encourage more users to complete registration.
Acquire paid subscriptions	Focus on identifying the most effective strategies to convert free users to paid subscribers.
Convert trials to paid subscriptions	Tailored for businesses offering free trials. This use case helps you identify the best times and methods to encourage trial users to convert to paid subscriptions.
Mitigate cart abandonment	Identify users who have abandoned their carts and create targeted campaigns to encourage these users to complete their purchases.

## Boost retention, upsell, and cross-sell

The **Boost retention, upsell, and cross-sell** business goal focuses on maximizing the value of your existing customer base. By analyzing customer behavior and preferences, you can create targeted strategies to encourage repeat purchases, introduce customers to higher-value products or services, and increase overall customer lifetime value.

Key considerations for this goal:

- Do you want to find more customers who share traits with your most valuable existing customers?
- Are you looking to increase the frequency of purchases from existing customers?
- Do you need to prevent churn among your high-value customers?
- Do you need to personalize your upsell or cross-sell efforts?

Use cases in this category include:

USE CASE	DESCRIPTION
Build high value lookalikes	Identify characteristics of your most valuable customers to inform retention and upsell strategies.
Increase repeat purchases	Analyze customer purchase history and behavior to create personalized recommendations and incentives that encourage repeat purchases.
Mitigate high value churn	Focus on identifying high-value customers who are at risk of churning and create targeted campaigns to retain them.
Nurture with content	Focus on creating and delivering personalized content to keep customers engaged with your brand between purchases, ultimately driving long-term loyalty.
Personalize upsell content	Analyze customer behavior and purchase history to create targeted upsell recommendations, increasing the average order value and customer lifetime value.
Personalize winback	Focus on re-engaging inactive customers, using personalized messaging and offers based on their past behavior and preferences.

## Personalize communications and product experiences

The **Personalize communications and product experiences** business goal focuses on creating tailored experiences for your customers across all touchpoints. With this business goal, you can create more relevant and

engaging communications and product experiences, leading to increased satisfaction and loyalty.

Key considerations for this goal:

- Do you want to personalize your onboarding process?
- Do you want to increase customer engagement and repeat purchases?
- Do you need to create targeted content for different user segments?
- Are you trying to re-engage inactive customers?

Use cases in this category include:

USE CASE	DESCRIPTION
Accelerate onboarding	Create a personalized onboarding experience that extends beyond initial signup, helping to drive long-term engagement.
Increase repeat purchases	Focus on personalizing the overall customer experience to drive repeat purchases.
Mitigate high value churn	Create personalized experiences and communications to retain high-value customers at risk of churning.
Nurture with content	Deliver personalized content experiences based on individual user interests and behaviors, keeping customers engaged with your brand.
Personalize upsell content	Focus on personalizing the entire product experience to facilitate upsells.
Personalize winback	Create personalized re-engagement campaigns for inactive users, tailoring the messaging and offers based on their past interactions with your brand.

## Next steps

Once you’ve selected a use case, follow the [Use Cases Setup Guide](#), which explains how to set up a use case.

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