
Customer Segmentation and Profiling Strategy Training Course

20 – 24 September 2027
Cape town





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Ref: 76_13074 **Date:** 20 – 24 September 2027 **Location:** Cape town **Fees:** 4800 GBP

Programme Summary

Customer segmentation and profiling strategy is a five-day training course for senior commercial leaders at strategic level, culminating in a segmentation and profiling blueprint for their own customer base. Many organisations hold large volumes of customer data yet still market and serve as if every customer were the same, or rely on old segments that no longer predict behaviour. The approach moves from data and segmentation methods to value scoring, governance and activation. Mars Training Centre UK delivers this programme in customer segmentation and profiling.

The Business Case

When segments are vague or outdated, marketing budgets are spread thinly, sales teams chase poorly matched prospects and high-value customers receive the same treatment as unprofitable ones. Leaders who define segments on evidence, attach a value to each profile and govern the underlying data can direct spend, offers and service effort to the customers who matter most, while keeping personal data use lawful.

- Marketing Return on Spend: Improves as campaigns and offers are matched to segments with a measured response history.
- Customer Value Mix: Shifts as acquisition and retention effort is directed by lifetime value and propensity scores.
- Data Protection Exposure: Falls as consent and retention rules are built into how profiles are created.

Principles and Evidence Base

- Segmentation, Targeting and Positioning STP Model: Provides the sequence from market division to target choice and value proposition used across Sessions 1 to 4.
- RFM Analysis: Structures the behavioural scoring of recency, frequency and monetary value in Session 2.
- Customer Lifetime Value: Frames the value-based ranking of segments and the investment logic in Session 3.
- Buyer Personas: Translate statistical segments into profiles that teams can act on in Session 3.

Intended Participants

- Leaders who decide how marketing and commercial budgets are allocated across customer groups.
- Executives accountable for customer data, insight and CRM functions.
- Senior managers who set pricing, offer and channel strategy for distinct customer types.
- Leaders responsible for the lawful use of personal data in marketing and sales.



The programme serves retail and consumer goods, banking and insurance, telecommunications, and business-to-business services.

Learning Outcomes

1. Participants will be able to diagnose the quality and coverage of the customer data available for segmentation.
2. Participants will be able to evaluate demographic, behavioural, needs-based and value-based segmentation methods for a given commercial question.
3. Participants will be able to construct customer profiles and personas that teams can apply in daily decisions.
4. Participants will be able to prioritise segments using lifetime value and propensity scores.
5. Participants will be able to design governance for consent, data quality and profile refresh.
6. Participants will be able to justify targeting, offer and service decisions for each priority segment.

Programme Structure

Day 1: Foundations of Customer Segmentation and Profiling

What does the organisation already know about its customers, and how reliable is it?

- Segmentation, Targeting and Positioning Sequence
- Customer Data Sources and Ownership Map
- Single Customer View and Identity Matching
- Data Quality Diagnostic and Gap Analysis
- Commercial Questions That Segmentation Must Answer

Day 2: Segmentation Methods and Behavioural Analysis

Which way of dividing customers best predicts what they will do next?

- Demographic and Firmographic Segmentation
- RFM Scoring of Purchase Behaviour
- Needs-Based Segmentation From Survey Research
- Cluster Analysis Concepts for Managers
- Segment Validation Tests: Size, Stability and Distinctiveness

Day 3: Customer Profiles, Personas and Value

How are segments turned into profiles that carry a measurable value?

- Profile Templates and Persona Construction
- Customer Lifetime Value Estimation
- Propensity Scores for Purchase, Upgrade and Churn
- Segment Value Matrix and Investment Priorities
- Business-to-Business Account Profiling



Day 4: Governance, Privacy and Activation

How are profiles kept lawful, current and used consistently across teams?

- Consent, Purpose Limitation and Data Minimisation
- Profiling Ethics and Fairness Checks
- Profile Refresh Cycles and Ownership Roles
- Segment-Based Offers, Pricing and Channel Plans
- Test-and-Learn Measurement by Segment

Day 5: Applying the Segmentation and Profiling Blueprint

How are data, methods, value and governance combined into one plan for the organisation?

- Data Readiness Review of a Participant Organisation
- Selection of Segmentation Method and Priority Segments
- Persona and Value Profile Drafting
- Peer Challenge of Targeting and Governance Choices
- Segmentation and Profiling Blueprint Presentation

Methodology

The programme is built around data workshops. Participants work with anonymised customer datasets from retail, banking and business-to-business settings, score behaviour, test candidate segments and build personas, then repeat each step for their own organisation. Facilitated debate tests whether each segment is large, stable and actionable enough to justify investment.

- Suggested activity: Scoring a retail transaction file with recency, frequency and monetary value.
- Suggested activity: Building a value matrix for the customer base of a business-to-business supplier.
- Suggested activity: Reviewing a profiling project against consent and fairness checks.

Capstone Output

Each participant completes a segmentation and profiling blueprint for their organisation. It sets out data sources, the chosen segmentation method, priority segments with value and propensity scores, personas, targeting and offer rules, and a governance plan for consent and refresh, ready for leadership review.

Frequently Asked Questions

Is customer segmentation and profiling suitable for leaders without a data science background?

Yes. It suits heads of marketing, commercial directors and CRM leaders, and assumes senior commercial experience but no statistical skills.



Which models underpin customer segmentation and profiling in this programme?

It draws on the segmentation, targeting and positioning model, RFM analysis, customer lifetime value and buyer personas.

How is the customer segmentation and profiling blueprint used at work?

You take back a blueprint that marketing, sales and service teams apply to campaigns, offers and account priorities, with named owners for data and consent.

How does customer segmentation and profiling differ from a customer loyalty programme course?

It focuses on how customer groups are defined, valued and governed, whereas loyalty courses concentrate on reward schemes and retention mechanics.