

Understand the strategic, tactical & cultural context of your business

Start from inside your company to see where the differences begin. A segmentation model should be shaped by your company's direction and relevant cultural factors, and the intended uses of the insight.

Only 30% of companies have segmentation models distinct from their competitors'.

Begin your journey

To differentiate your brand based on experience, your whole organization needs a common, actionable view of your customers.

18% of executives report they are not aware of any segmentation model in use at their company.

Rethinking 'the Customer' in the age of #CX

A roadmap to creating a strategically actionable customer segmentation model

Understand customer motivations, goals, preferences & behaviors

Go onsite to get insight. Gather qualitative input from customers—former, existing and prospective—to better understand the range of motivations and perspectives.

Most companies segment only on readily measured factors like size, spend, channel and product choice—factors better suited to a product-centric strategy than a customer-centric one.

Formulate hypotheses about what makes your customers tick

Using insights from your qualitative research, develop your theory of the differences that really matter between customers.

"The Customer" is not a statistical average. Market leaders take a more nuanced view.

Source: Quarry, "The State of Segmentation in North American Enterprise", 2014.
Sample: \$100MM to \$10BB in sales. 200 sales, marketing and product development executives. B2C and B2B companies.

Download this roadmap at: quarry.com/segmentationforCX

START

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Gather quantitative data

Once you know the key differences, gather quantitative data to learn the distribution of these differences across a population.

85% of companies base their segmentation model on intuition or qualitative research only.

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Build personas & your segmentation model

Formalize a strategically-relevant model of the differences that make a difference™ between customers that can be used across your organization. Inspire your team by representing the insights in robust personas.

90% of companies lack a single, shared segmentation across their organization.

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Synthesize qualitative & quantitative findings

Integrate insights from the qualitative research as an interpretative lens for the quantitative data.

A robust segmentation model is both art (conceptually valid) and science (statistically reliable).

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Analyze the quantitative data

Leverage analytical techniques to build your segmentation model. To maximize actionability, cluster on a single data type (typically attitudinal), then overlay other data (e.g. demographic, financial).

Just 15% of companies use statistical clustering to drive the definition of their segmentation model.

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Socialize the segmentation

Onboard and activate the segmentation model through purpose-built tools, workshops and updated processes.

Those who understand how a segmentation model was built are more likely to embrace its use.

You've arrived

With a refreshed customer segmentation model, your organization will be well equipped to build inspired and engaging omni-channel customer experiences.

Talking about customer-centricity doesn't distinguish leaders from the rest. Being customer-centric does.

FINISH

In the age of customer experience (CX), companies must deeply understand their customers—better than anyone else does—and share a common view of those customers across the organization. But, our research found that the majority of companies have a long way to go. Here's a roadmap that shows the path to building a customer segmentation model that fuels effective CX design and delivery.

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