CONCEPT

Customer Segmentation, Personas and Customer Insight for CX Teams

1 – 5 March 2027
Barcelona - Eixample district four-star



Customer Segmentation, Personas and Customer Insight for CX Teams

Ref: 1100_5337 **Date:** 1 – 5 March 2027 **Location:** Barcelona - Eixample district four-star **Fees:** 23500 SAR

Technical depth: Practitioner · **Practical mode:** Modelling build

Introduction

Organisations hold more customer data than ever, yet many still design services for an average customer who does not exist. Segments are drawn on demographics alone, personas are written from assumptions in a workshop, and neither is refreshed or used when decisions are made. This Core Concept course equips managers to build segments from behavioural, needs and value data, ground personas in real research and express findings as insight that teams can act on. Participants work with sample datasets from several sectors and leave with a Customer Segmentation and Persona Pack.

Course Objectives

- Audit an existing segmentation for actionability and identify the customer data sources available to improve it
- Build behavioural and value-based segments using RFM scoring, customer lifetime value and cluster analysis
- Uncover customer needs with Jobs To Be Done interviews and synthesise them into needs-based segments
- Create evidence-based personas and write insight statements that lead to specific decisions
- Validate segments and personas for stability, bias, inclusivity and responsible use of personal data
- Produce a Customer Segmentation and Persona Pack with an activation plan for service and product teams

Target Audience

- Customer insight and market research managers
- Customer experience managers responsible for designing for different customer groups
- CRM, marketing and customer analytics managers who build and use segments
- Product and service design managers who rely on personas in design decisions
- Business intelligence analysts supporting customer strategy

Course Outline

Day 1: Segmentation Foundations and Current Customer Knowledge

- Segmentation Bases: Demographic, Behavioural, Needs-Based and Value-Based
- ISO 20252 Quality Requirements for Customer Research and Data Analytics
- Customer Data Source Inventory: CRM, Transactions, Surveys and Digital Analytics
- Current Segmentation Audit Using Actionability and Coverage Tests
- Insight Statement Template: Observation, Motivation and Implication

Day 2: Segmentation and Persona Models

- Jobs To Be Done Theory and Job Statement Syntax
- RFM Scoring Model for Behavioural Segmentation
- Customer Lifetime Value Model for Value-Based Tiers
- ISO 9241-210 Context of Use Analysis for Persona Research
- Value Proposition Canvas: Customer Jobs, Pains and Gains

Day 3: Building Segments and Personas

- Customer Interview Guide Design for Jobs To Be Done Research
- Affinity Mapping of Qualitative Research Findings
- K-Means Cluster Analysis in Excel, Python or SPSS
- Segment Profiling and Sizing Tables
- Evidence-Based Persona Template Build with Empathy Maps

Day 4: Validation, Bias and Responsible Use

- Segment Validation: Stability, Distinctiveness and Actionability Tests
- Proto-Persona Pitfalls and Stereotype Bias Controls
- Personal Data Minimisation and Consent Controls Aligned to ISO/IEC 27701
- Inclusive Personas for Customers in Vulnerable Situations Using ISO 22458
- Segment Migration Tracking and Refresh Cadence Design

Day 5: Modelling Build and the Segmentation and Persona Pack

- Retail Loyalty Dataset Exercise: RFM and Cluster Build
- Digital Services Dataset Exercise: Needs-Based Segment Profiling
- Persona Set Build from Course Research Evidence
- Customer Segmentation and Persona Pack Drafting with Activation Plan
- Peer Review Panel and Pack Defence

Skills You Will Gain

- Customer Segmentation
- Behavioural Data Analysis
- Needs Discovery Interviewing
- Qualitative Research Synthesis
- Persona Development
- Insight Communication
- Responsible Customer Data Use

Why Attend This Course

- Return to work with a Customer Segmentation and Persona Pack built from realistic data and research
- Replace personas based on opinion with ones your colleagues can trace back to evidence
- Show product, service and marketing teams exactly which decisions each segment should change
- Work alongside insight and CX managers from other sectors and countries facing the same data questions

Conclusion

Segments and personas are worth building only when they rest on evidence and change what teams decide. This course moves from auditing current customer knowledge, through the behavioural, value and needs-based models that define segments, to the research, clustering, validation and data protection controls that make them trustworthy. The final day turns that material into a Customer Segmentation and Persona Pack that participants take back to their organisation, giving service, product and marketing teams a shared and tested picture of who their customers are.