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COURSE BROCHURE

# Advanced Customer Profiling and Segmentation Analytics Course

14 – 25 February 2027
Online

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Registered in the United Kingdom and Saudi Arabia

# Advanced Customer Profiling and Segmentation Analytics Course

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Customer Profiling and Segmentation Analytics is a 2-week training course for customer insight analysts, marketing analysts and CRM specialists, who leave with a Customer Segmentation and Persona Playbook for their organisation. Customer records now pile up across apps, loyalty schemes and service channels, yet many organisations still treat every customer alike in service and offers. Jupiter Prime Training delivers Customer Profiling and Segmentation Analytics for these analytical roles.

## Why Customer Profiling and Segmentation Analytics Matters Now

Three forces push profiling up the agenda: transactional and behavioural records that grow faster than teams can interpret them, customers who expect service and offers that recognise their history, and tighter expectations on lawful, transparent use of personal data. Organisations that segment well direct scarce service capacity and marketing spend to the customers who value it most; those that segment poorly irritate loyal customers with irrelevant offers and miss early signs of decline. The course rests on recency, frequency and monetary RFM analysis, cluster analysis methods and the Cross-Industry Standard Process for Data Mining CRISP-DM.

## Who Gains Most from Customer Profiling and Segmentation Analytics

- Insight analysts who turn customer records into segments and personas leaders can act on
- Marketing analysts responsible for targeting, campaign selection and offer design
- CRM specialists who maintain customer attributes, scores and segment flags in systems
- Service planners who match channel, priority and handling rules to customer groups
- Data stewards who oversee consent, retention and access rules for customer profiles

Teams that send an insight analyst with a CRM specialist gain most, because segment logic and its implementation in customer systems are then designed in one pass.

## Customer Profiling and Segmentation Analytics Capabilities

Participants practise moving from raw customer records to stable, explainable segments that service and marketing teams trust and use.

- Specify the customer attributes, sources and refresh rules a profile needs — data owners
- Calculate RFM scores and lifetime value bands from transaction histories — marketing leads
- Apply clustering techniques and test segment stability over time — insight managers
- Build evidence-based personas that frontline staff recognise — service designers
- Assess profiling practices against consent, minimisation and fairness principles — data protection officers
- Design segment-based service and offer rules for CRM execution — channel owners

## Key Customer Profiling and Segmentation Analytics Terms

- Customer profile — a structured record of attributes, behaviours and preferences describing one customer or account.
- RFM analysis — scoring customers by recency, frequency and monetary value of purchases to rank engagement and worth.
- Cluster analysis — statistical grouping of customers so members of a group resemble each other more than other groups.
- Persona — a narrative portrait of a segment that brings its needs, motives and behaviours to life.
- Propensity score — a model estimate of how likely a customer is to take an action, such as buying or leaving.
- Data minimisation — collecting and keeping only the customer data needed for a stated purpose.

## Customer Profiling and Segmentation Analytics Day by Day

### Day 1: Why Profiling Shapes Service and Offers

- Mass Versus Segmented Treatment Economics — Where Differentiation Pays
- Segmentation Strategy Canvas — Business Questions Segments Must Answer
- Use Case Inventory — Service Priority, Retention, Cross-Sell and Pricing
- CRISP-DM Project Framing — Business Understanding Before Modelling
- Stakeholder Requirements Gathering — Marketing, Service and Risk Needs

### Day 2: Customer Data Sources and Collection

- Customer Data Inventory — Transactions, Interactions, Demographics and Surveys
- Single Customer View Design — Matching Records Across Channels
- Data Quality Profiling — Completeness, Accuracy and Duplicate Checks
- Zero-Party and First-Party Data Capture — Preferences Customers Share
- Feature Engineering for Customers — Ratios, Trends and Tenure Variables

### Day 3: Value-Based Profiling

- RFM Scoring Procedures — Binning, Weighting and Score Labels
- Customer Lifetime Value Bands — Grouping by Projected Worth
- Cohort Analysis — Behaviour by Acquisition Period
- Product Holding Patterns — Breadth and Depth of Relationships
- Value Migration Tracking — Customers Moving Between Bands

### Day 4: Behavioural and Needs-Based Segmentation

- Behavioural Variable Selection — Channel Use, Timing and Basket Signals
- Needs-Based Survey Segmentation — Attitudes and Buying Motives
- Life Stage and Event Triggers — Moves, Births and Business Changes
- Service Need Profiles — Self-Serve, Assisted and High-Touch Customers
- Hybrid Segmentation Models — Combining Value and Needs Views

## Day 5: Clustering Techniques

- K-Means Clustering — Choosing Cluster Numbers With Elbow and Silhouette
- Hierarchical Clustering — Dendrograms for Nested Segment Structures
- Variable Scaling and Weighting — Preventing One Attribute Dominating
- Segment Profiling Tables — Describing Each Cluster in Plain Terms
- Stability Testing — Holdout Samples and Re-Run Consistency

## Day 6: Predictive Profiles and Scores

- Churn Propensity Models — Flagging Customers Likely to Leave
- Next-Best-Offer Logic — Matching Products to Profile Signals
- Decision Tree Segmentation — Transparent Rules From Target Outcomes
- Score Calibration and Cut-Offs — Balancing Reach and Precision
- Model Monitoring — Drift in Customer Behaviour and Scores

## Day 7: Personas That Teams Use

- Persona Construction From Segments — Data Plus Interview Evidence
- Persona Validation Interviews — Testing Recognition With Frontline Staff
- Empathy Maps — Thoughts, Feelings and Pain Points per Persona
- Persona Cards for Service Teams — One-Page Handling Guides
- Persona Retirement Rules — When Segments Shift or Merge

## Day 8: Profile Governance and Privacy

- Lawful Basis and Consent Mapping — Profiling Uses Against Permissions
- Data Minimisation Reviews — Removing Attributes Without Purpose
- Fairness and Bias Checks — Protected Characteristics and Proxy Variables
- Profile Access and Retention Rules — Who Sees What and How Long
- Customer Transparency Notices — Explaining Profiling in Plain Language

## Day 9: Activating Segments in Service and Marketing

- Segment-Based Service Routing — Priority Queues and Specialist Teams
- Offer Targeting Rules — Eligibility, Suppression and Contact Limits
- CRM Segment Flags and Refresh Cycles — Keeping Labels Current
- Test and Control Design — Measuring Segment Strategy Uplift
- Sector Applications — Banking Retention and Retail Loyalty Cases

## Day 10: Practising the Customer Segmentation and Persona Playbook

- Data Readiness Check — Applying Day 2 Quality Tests to Own Data
- Segment Model Selection — Comparing Day 3 and Day 5 Approaches
- Persona Set Review — Day 7 Cards With Peer Challenge
- Governance Sign-Off Checklist — Day 8 Privacy and Fairness Tests
- Customer Segmentation and Persona Playbook — Segments, Rules, Owners and Refresh Plan

## Applying Customer Profiling and Segmentation Analytics After the Course

- Run RFM scoring on one customer base, publish the resulting segments with plain-language profiles and agree one service or offer rule per segment.
- Hold a profiling privacy review with the data protection lead, removing at least one attribute that lacks a stated purpose.

## Customer Profiling and Segmentation Analytics Questions FAQ

### What is customer profiling and segmentation analytics, and why does it matter now?

It is the practice of grouping customers by value, behaviour and needs so service and offers can differ by group. It matters now because customer data is plentiful, customers expect relevance and personal data use faces closer scrutiny.

### Which roles gain most from customer profiling and segmentation analytics training?

Customer insight analysts, marketing analysts and CRM specialists gain most. Service planners and data stewards also benefit, since they apply segments to routing rules and oversee consent, retention and fairness in the way profiles are built and used.

### How does customer profiling and segmentation analytics differ from a general data analytics course?

It applies analytics to one question: how customers differ and what to do about it. A general analytics course covers tools broadly; here you work through RFM, clustering, personas, profile governance and activation in service and marketing.

### What do you bring back from customer profiling and segmentation analytics training?

You bring back a playbook for your customer base. It defines the segments, their personas, the data and refresh rules behind them, privacy checks and the service and offer rules attached to each segment.

## Customer Profiling and Segmentation Analytics: The Way Forward

The Customer Segmentation and Persona Playbook first informs which customer groups receive differentiated service and offers in the next campaign cycle. Insight analysts, CRM specialists and channel owners use it to align targeting and handling rules. After its first use, revisit segment stability and fairness checks, because customer behaviour shifts and segments drift faster than most teams expect.