Customer Segmentation Template for Top 20% Customers

1. Customer Profile Information

- Customer ID/Name: (to uniquely identify the customer)
- Contact Information: (phone, email, address)
- Demographic Data: (age, gender, occupation, income level)
- Geographic Location: (city, state, country)

2. Behavioral Data

- Purchase History: (list of products/services bought)
- Purchase Frequency: (how often they purchase)
- Average Spend: (average amount spent per purchase)
- Loyalty Metrics: (participation in loyalty programs, repeat purchases)

3. Engagement Data

- Preferred Communication Channel: (email, SMS, social media, etc.)
- Response to Marketing Campaigns: (which campaigns were most effective)
- Social Media Activity: (engagement level with brand's social media posts)
- Feedback and Reviews: (customer feedback on products/services)

4. Psychographic Information

- Interests: (hobbies, entertainment preferences, etc.)
- Lifestyle: (lifestyle choices that influence buying decisions)
- Values: (what values drive their purchase decisions, e.g., sustainability)
- Personality Traits: (characteristics such as outgoing, conservative, tech-savvy)

5. Segment-Specific Notes

- Key Influencers: (who or what influences their buying decisions)
- Challenges/Problems: (common challenges or needs the customer faces)
- Opportunities for Upsell/Cross-sell: (potential opportunities based on their profile)
- Tailored Marketing Strategies: (suggested strategies for effective engagement)

Usage Instructions:

Gather Data: Collect data through various channels such as sales records, customer surveys, social media analytics, and customer service interactions.
Analyze Trends: Look for patterns and trends in the data that reveal insights about customer preferences and behaviors.
Update Regularly: Keep the information up-to-date by revisiting and revising the customer profiles periodically to reflect any significant changes or new findings.
Apply Insights: Use the insights gained from this detailed segmentation to tailor marketing campaigns, improve customer service, and enhance product offerings.