

Customer Segmentation Strategy Document

1. Objective

Define the purpose of customer segmentation and expected outcomes for the business.

2. Segmentation Criteria

- Demographic (age, gender, income, location, etc.)
- Psychographic (lifestyle, interests, values)
- Behavioral (purchase frequency, loyalty, product usage)
- Needs-Based
- Other relevant criteria

3. Segment Profiles

Segment Name	Description	Key Characteristics	Size (%)
Segment 1	Brief description	Key traits	XX%
Segment 2	Brief description	Key traits	XX%
Segment 3	Brief description	Key traits	XX%

4. Data Sources

- CRM and customer database
- Surveys
- Web analytics
- Third-party data providers
- Other internal/external sources

5. Segment Targeting Strategy

Outline approach to prioritizing specific segments and rationale behind targeting.

6. Positioning & Value Proposition per Segment

Segment	Positioning Statement	Value Proposition
Segment 1	Statement	Proposition
Segment 2	Statement	Proposition

7. Implementation Plan

1. Timeline and milestones
2. Key stakeholders and responsibilities
3. Required tools and resources

8. Measurement & KPIs

Define metrics for monitoring segmentation success and improvement areas.

9. Review & Optimization

Outline frequency and process for reviewing segmentation effectiveness and making adjustments.