# Hello,
# Quirk's Event

## About Us

- CX Focused Custom Research

- Consumer & B2B

- Client-Inspired Solutions

## Agenda

- Develop a stakeholder-approved segmentation

- Tools & tactics

- Integrating segments into CX efforts

**Marc Goulet |** Vice President, Client Development

**2015 B2B Segmentation**

**2017 Consumer Segmentation**

**Few types of research have as significant an investment and such a low rate of short-to-medium term success**

# Avoid failure by developing a **systematic process**

**1**

# Stakeholder Interviews

**1**

**Stakeholder Workshops:**
**Research Is A Team Sport**

## Stakeholder Interviews                    ## Stakeholder Workshops

| | | |
|---|---|---|
| Individual, often over the phone | **Setting** | In-person as a group |
| Days / weeks to complete | **Timing** | 3 – 4 focused hours |
| Develop list of (competing) priorities | **Output** | Develop a _hierarchy_ of priorities |
| Requires post-process clarification | **Implementation** | Hit the ground running |
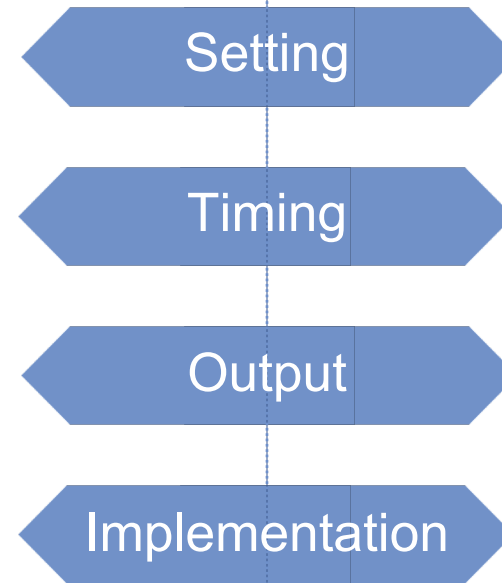
## Workshops Can Better Align The Organization to CX efforts

# Establish Success Criteria

Identifying key questions to make research actionable & useful

- o Determine which discussion areas can and cannot bring meaningful insight to the organization

- o Provide well defined criteria against which results can be assessed at key points in the process

- o Assess whether final results are consistent with organizational needs and expectations
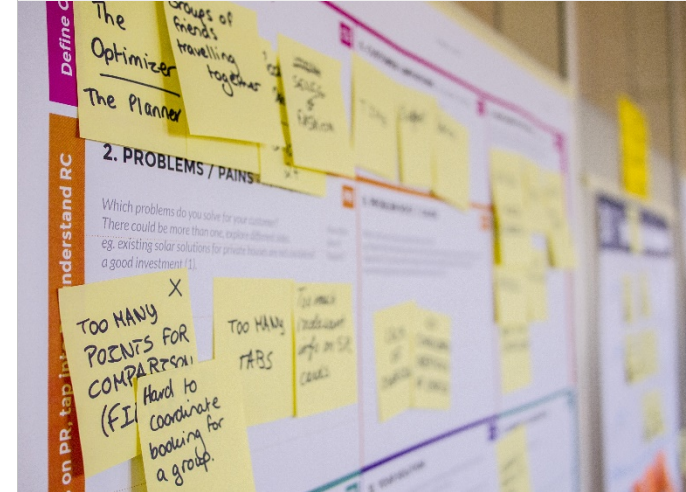
**Success Criteria As North Star**

**01**

Post-Exploratory / Survey Design

**02**

Segment Solution Development

**03**

Analysis & Recommendations

# Success Criteria Example: Casual Dining Chain

Stakeholders were presented with a broad array of the dimensions of the customer experience.

| | | | | | |
|---|---|---|---|---|---|
| PRODUCT INNOVATION | RETAIL / GROCERY | RESTAURANT ATMOSPHERE | HEALTH OPTIONS | MENU VARIETY | RESTAURANT FORMAT |
| LOCATION STRATEGY | VALUE OF OFFER | PRODUCT QUALITY | TECHNOLOGY DEVELOPMENT | DELIVERY | DRIVE THRU |

# Success Criteria Example: Casual Dining Chain

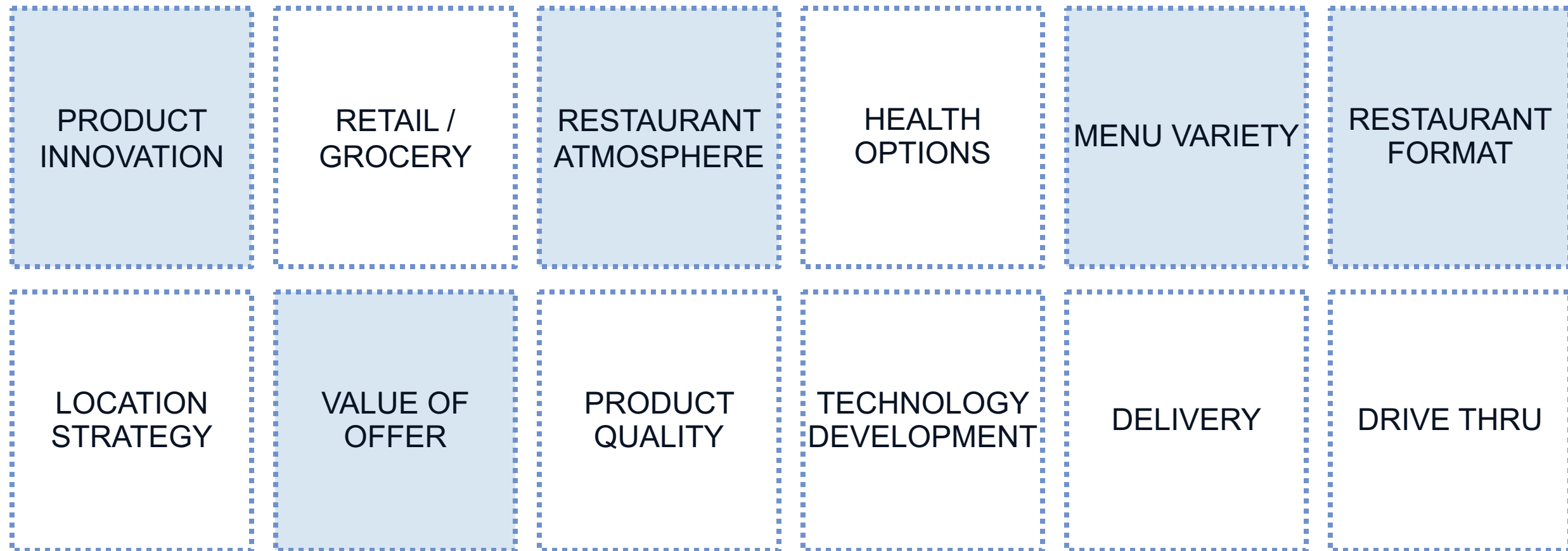Stakeholders were presented with a broad array of the dimensions of the customer experience.

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**THIS LIST WILL BE WRONG**

# Setting Guard Rails & Direction

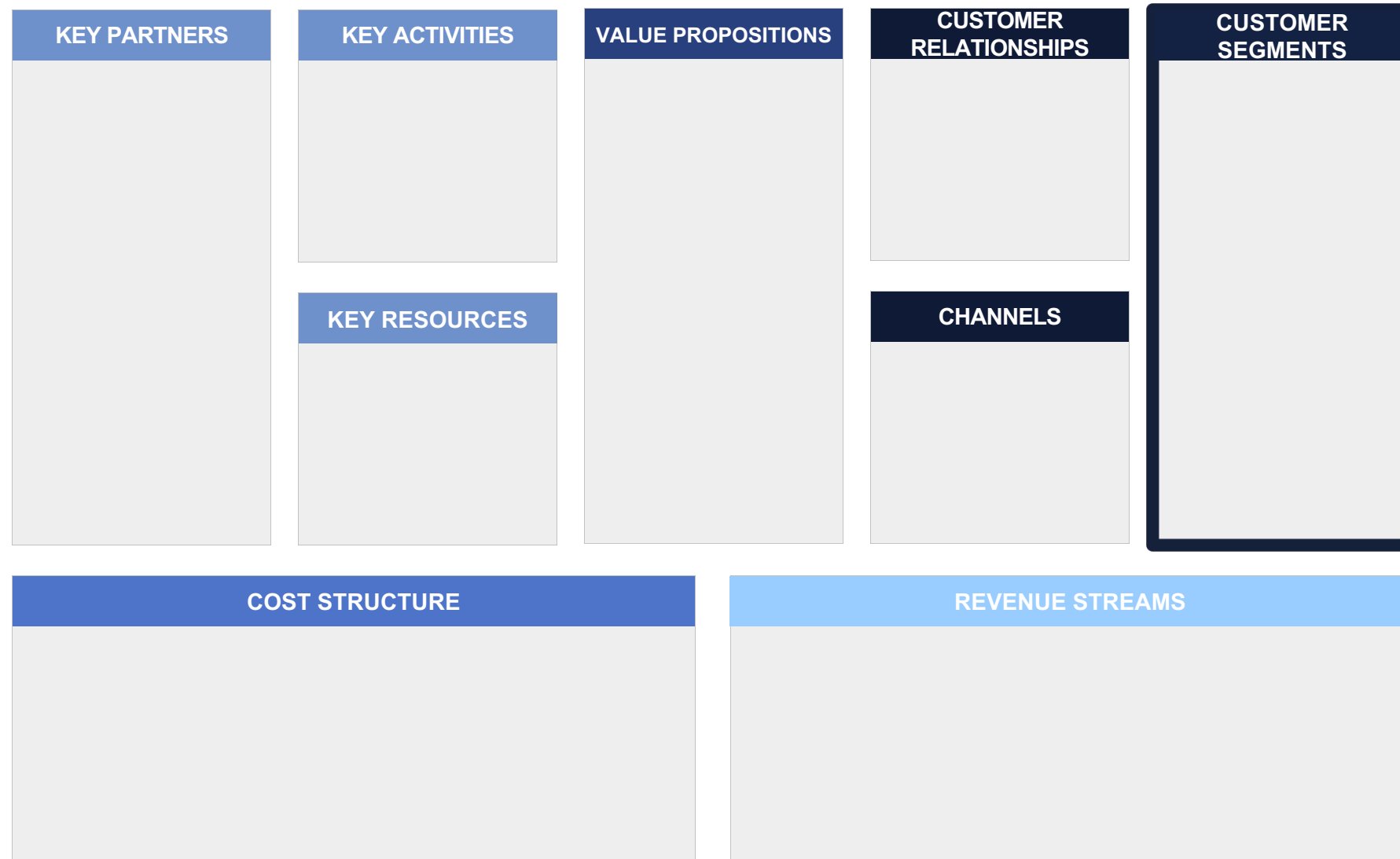| | | | | | |
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**2**

**Leverage Existing**
**Frameworks**

# Framework: Empathy Mapping

- Get inside of the mind of end users

- Ultimately hypothesize the pain points which prevent them from achieving the job-to-be-done and their desired outcomes

- Align stakeholder assumptions vs. users reality in subsequent qual & segmentation

**TASKS**
What are they trying to complete? Outstanding questions?

**FEELINGS**
How do they feel? What really matters?

**INFLUENCES**
What influences how they act?

**PAIN POINTS**
What needs to be overcome?

**OVERALL GOAL**
What is the job-to-be-done?

| KEY PARTNERS | KEY ACTIVITIES | VALUE PROPOSITIONS | CUSTOMER RELATIONSHIPS | CUSTOMER SEGMENTS |
|---|---|---|---|---|
| | KEY RESOURCES | | CHANNELS | |

| COST STRUCTURE | REVENUE STREAMS |
|---|---|

# Framework: Business Model Canvas

- Develop and agree on the current state of the business

- Connects various parts of the organization and narrows the thought process

- Identifies incoming customer segment assumptions and how each segment relates to the rest of the business model

# Exercise: Stakeholder Q&A

- Exploration exercise to stimulate discussion, identify opportunity, and drive guide and survey development

- Develop a more wide-ranging and inclusive set of user needs

- Helps in the development and crystallization of success criteria

## Examples

- ✓ What is one industry norm you could challenge to provide more authenticity?

- ✓ How can you leverage technology to build trust among your customers?

- ✓ What value propositions do you believe would "delight" the target audience?

- ✓ How can you add an element of exclusivity to your experience?

- ✓ What single incremental improvement could result in a short-term win?

## 3

# Force Decisions – Including Touchpoints

## Force Decisions

- Scales can create muddy segments

- Maximum Difference Scaling

- Semantic Differential scales

- Touchpoint Optimization tool

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Phone Calls | O | O | O | O | O | O | O | Web Chats |
| Drive-thru | O | O | O | O | O | O | O | Delivery |
| One-Time Fee | O | O | O | O | O | O | O | Monthly Billing |

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# Get The Band Back Together

# Success Criteria As North Star

## 01
Post-Exploratory / Survey Design

## 02
Segment Solution Development
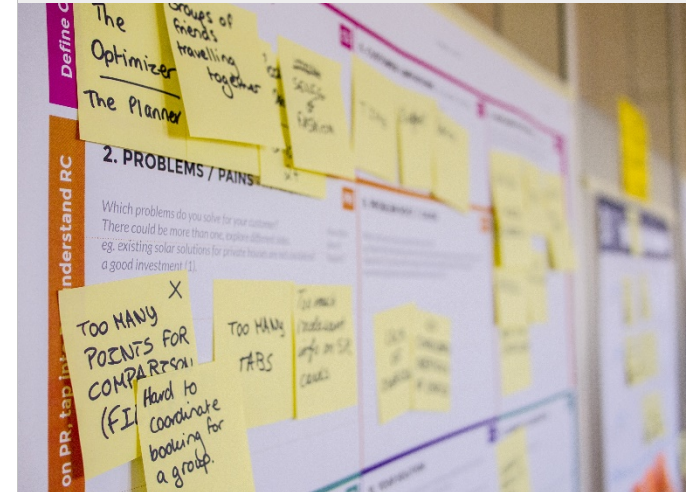
## 03
Analysis & Recommendations

# Getting the Band Back Together
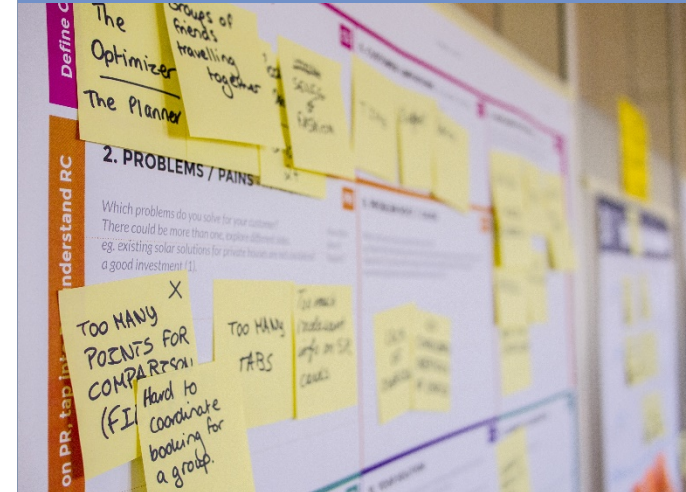
Small Stakeholder Group

Review, Understand, Name Segments

Align With The North Star

**01**

Post-Exploratory / Survey Design
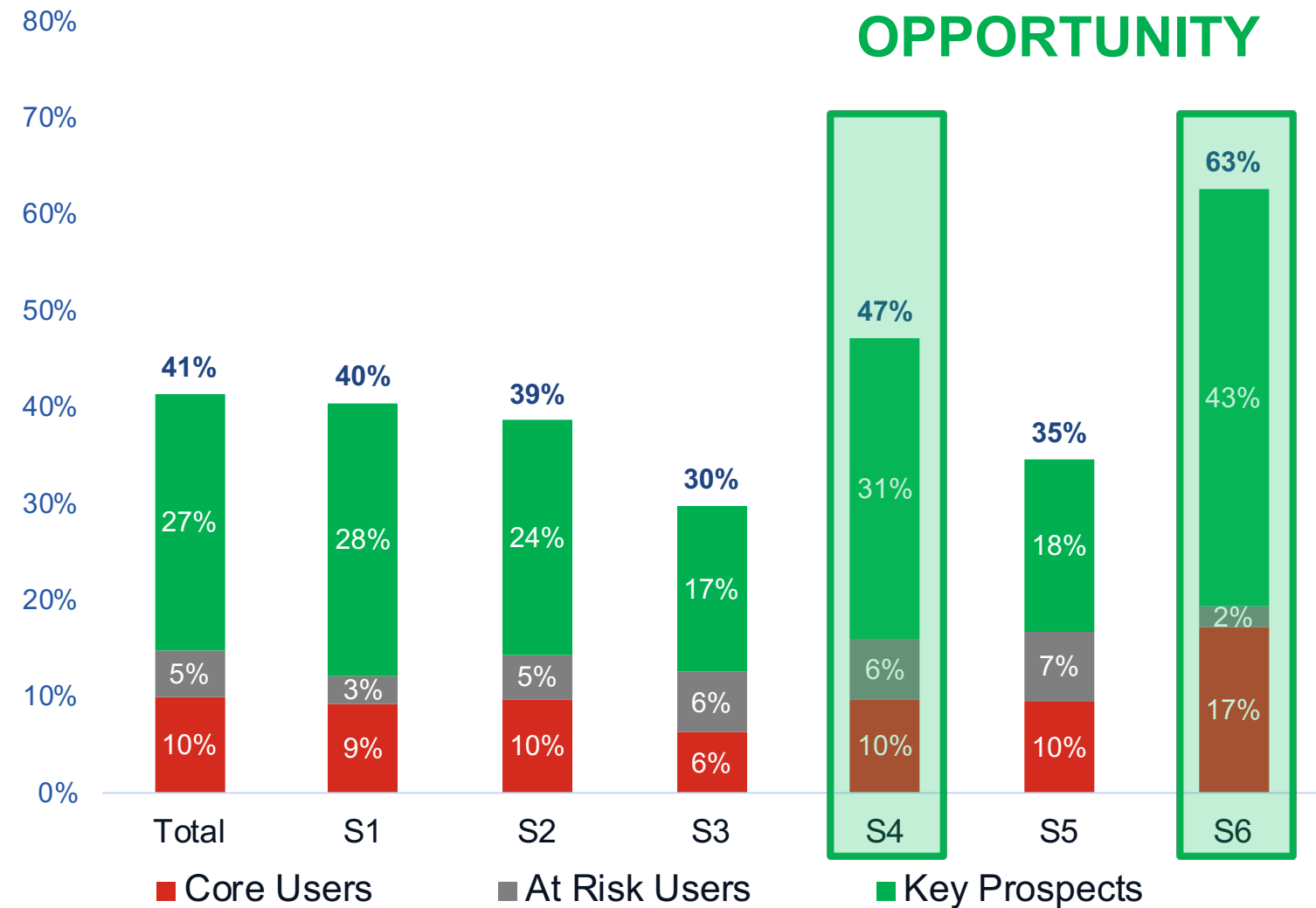
**02**

Segment Solution Development

**03**

Analysis & Recommendations

**5**

# Evaluate Opportunity – What Defines A Win?

# Identify Opportunity: <u>Spotlight</u> Analysis

- "Segmentation within a Segmentation"

- Lookalike Analysis

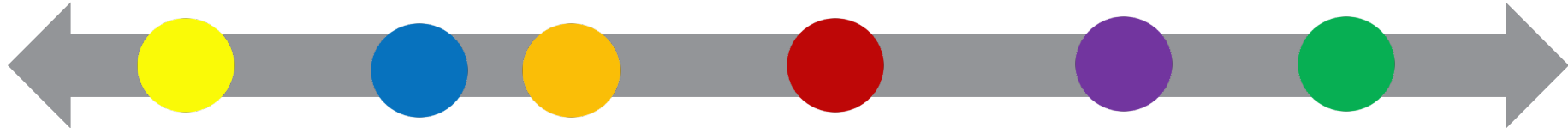- Mix of Art & Science
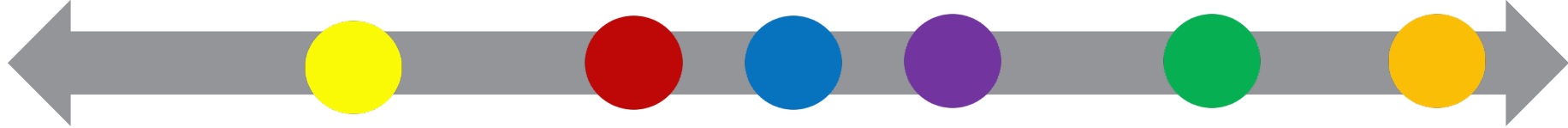
- Excellent for Established Categories

**OPPORTUNITY**

| Category | Core Users | At Risk Users | Key Prospects | Total |
|---|---|---|---|---|
| Total | 10% | 5% | 27% | 41% |
| S1 | 9% | 3% | 28% | 40% |
| S2 | 10% | 5% | 24% | 39% |
| S3 | 6% | 6% | 17% | 30% |
| S4 | 10% | 6% | 31% | 47% |
| S5 | 10% | 7% | 18% | 35% |
| S6 | 17% | 2% | 43% | 63% |

Legend: ■ Core Users  ■ At Risk Users  ■ Key Prospects
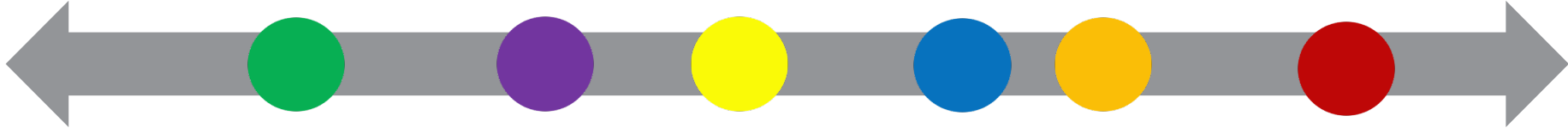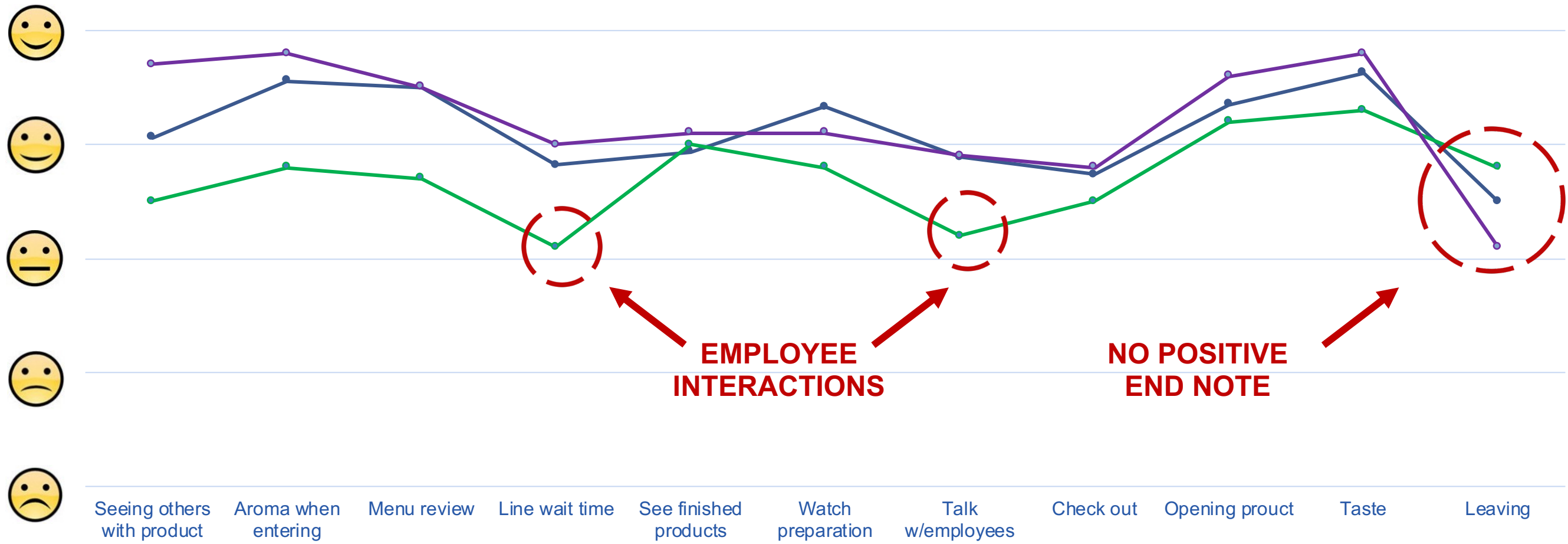
# Touchpoint Review: (Opportunity Segments)

- Evaluate the journey
- Understand joy & pain points
- Optimize for opportunity



**EMPLOYEE INTERACTIONS**

**NO POSITIVE END NOTE**

Seeing others with product | Aroma when entering | Menu review | Line wait time | See finished products | Watch preparation | Talk w/employees | Check out | Opening prouct | Taste | Leaving

**6**

# Make Friends
# With Data Science

## Connecting the Dots

- Power of Combining Custom Research & Data Science

- Type & Activate Customer / Prospect Data

- Continually Improve The Solution

# Thank You

## Any Questions?

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