SEGMENT PLANNING

KEY MEASURES

- Portfolio Growth
- Revenue Lift
- Brand Penetration
- Loyalty
- Retention
- Engagement

CUSTOMER PORTFOLIO STRATEGY

OVERVIEW

- Value Tiers
- Key Segments
- Growth Potential
- Strategic Imperatives

SEGMENT PROFILES KPIS/TRENDS

PORTFOLIO GOALS

BUSINESS DRIVERS

- Productivity
- Profitability
- Growth
- Innovation

JOURNEY MAPPING

BUYER JOURNEY

PRE-PURCHASE

- Problem Diagnosis
- Product Search
- Product Reviews
- Product Evaluation
- Price Configuration

PURCHASE

- Order Management
- Confirmation
- Delivery
- Onboarding Support
- Troubleshooting

POST-PURCHASE

- Brand Updates
- Inquiry Management
- Problem Resolution
- Service Notifications
- Tutorials

PRODUCT OFFER

- Configurability
- Customizability
- Replenishment

Pricing Model

Payment Terms

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- **PROGRAM DESIGN**

RELATIONSHIP MANAGEMENT

Onboarding Value Creation Loyalty & Retention

KNOWLEDGE TRANSFER

Informational Content Tools & Utilities Live Events

TRAINING AND EDUCATION

Structured Learning Training Guides Interactive Resources



CUSTOMER NEEDS

PURCHASE DRIVERS

- Benefits
- Key Decision Factors
- Service Augmentation
- Price/Value
- Customization

LOYALTY DRIVERS

- Service Quality
- Integrity
- Trustworthiness
- Reliability
- Responsiveness
- Recognition
- Entitlements
- Rewards
- Advocacy
- Support

INFORMATIONAL NEEDS

- Best Practices
- Product Use
- Market Trends
- Breaking News
- Advice
- Alerts

CUSTOMER JOURNEY

- Pain Points
- Moments of Truth

EXPERIENCE DESIGN

VALUE PROPOSITION

SERVICES

- Business Tools
- Advisory Services
- Financing
- Insurance
- Managed Services

ENTITLEMENTS

- $\boldsymbol{\cdot} \textbf{ Service Levels}$
- Rewards
- Training
- Warranties
- Subscriptions



COMMUNITY MANAGEMENT

Brand Community Social Media Social Advocacy

SERVICE AND SUPPORT

Voice of Customer Self-service Issue Resolution