

Customer Profiling Techniques & Procedures

Duration: 5 Days

Language: en

Course Code: PM2-116

Objective

Upon completion of this course, participants will be able to:

- Understand the importance of customer profiling for targeted marketing and improved customer engagement.
- Learn various techniques for collecting and analysing customer data.
- Develop skills to create detailed customer profiles, including demographic, psychographic, and behavioural information.
- Gain knowledge on using customer profiles to inform marketing strategies and product development.
- Learn to continuously update customer profiles based on changing customer behaviour and market trends.

- Understand how to use customer feedback and surveys to enhance profiling accuracy.

Audience

This course is intended for:

- **Marketing Professionals** : Individuals responsible for developing targeted marketing campaigns and strategies.
- **Sales Managers and Representatives** : Professionals looking to understand customer segments better and tailor their sales approaches.
- **Business Analysts** : Those involved in market research, customer insights, and data-driven decision-making.
- **Customer Service and Support Personnel** : Individuals aiming to enhance customer experiences by understanding diverse customer needs and behaviours.
- **Product Managers** : Professionals focused on product development and improvements based on customer profiles and market demand.
- **Entrepreneurs and Small Business Owners** : Those seeking to refine their marketing and sales efforts by understanding their target customers.

Training Methodology

The course adopts a combination of theoretical instruction and hands-on practice to ensure participants can effectively apply customer profiling techniques:

- **Lectures and Presentations** : The course begins with expert-led sessions on customer profiling concepts, data collection methods, and segmentation techniques.
- **Interactive Group Discussions** : Participants will engage in discussions to explore different approaches to customer profiling, share experiences, and address challenges.
- **Case Study Analysis** : Real-world examples of customer profiling success will be analysed, allowing participants to learn from best practices and innovative strategies.
- **Hands-On Data Analysis Workshops** : Participants will work with datasets to practice segmenting customers, analysing behaviour patterns, and creating buyer personas.
- **Role-Playing Scenarios** : Participants will simulate customer interactions through role-playing exercises to refine their understanding of profiling and customer

segmentation.

- **Assessments and Feedback** : Quizzes, assignments, and group feedback sessions will help participants solidify their knowledge and identify areas for improvement.

Summary

Customer profiling creates detailed descriptions of different segments within an organisation’s customer base. This information is essential for developing tailored marketing strategies, enhancing customer experiences, and improving product and service offerings. The "Customer Profiling Techniques & Procedures" training course provides participants with the tools and techniques to identify, segment, and understand their customers, ensuring more targeted and effective engagement.

This course covers a range of customer profiling techniques, from collecting and analysing demographic data to understanding psychographics, behaviour patterns, and purchasing habits. Participants will learn how to create comprehensive customer profiles, also known as buyer personas, that help organisations connect with their target audience more effectively. Additionally, the course will explore how to use data analytics, surveys, and customer feedback for profiling and ways to leverage this information in marketing campaigns, product development, and customer service strategies.

By the end of this course, participants will be equipped to conduct customer profiling activities that drive better decision-making, improve marketing effectiveness, and enhance customer satisfaction. The course is ideal for marketing professionals, sales managers, business analysts, and customer service personnel seeking to deepen their understanding of customer behaviour and preferences.

Course Content & Outline

Section 1: Introduction to Customer Profiling

- What is Customer Profiling, and Why is it Important?
- The Role of Customer Profiles in Marketing, Sales, and Product Development
- Key Components of Effective Customer Profiles

Section 2: Data Collection for Customer Profiling

- Gathering Demographic Data: Age, Gender, Income, Location, etc.
- Understanding Psychographics: Lifestyle, Interests, Values, and Attitudes

- Behavioural Data: Purchase History, Website Interactions, and Engagement Metrics
- Using Surveys, Interviews, and Focus Groups for Data Collection

Section 3: Techniques for Analysing Customer Data

- Segmentation Methods: Demographic, Geographic, Psychographic, and Behavioral Segmentation
- Using Data Analytics Tools (e.g., CRM Software, Google Analytics) for Customer Insights
- Identifying Patterns and Trends in Customer Behavior
- Building Data-Driven Customer Personas

Section 4: Creating Comprehensive Customer Profiles

- Steps to Developing Detailed Buyer Personas
- Mapping Customer Journeys: Understanding Touchpoints and Experiences
- Incorporating Customer Needs, Pain Points, and Motivations into Profiles
- Creating Actionable Insights from Customer Profiles

Section 5: Applying Customer Profiles in Marketing Strategies

- Targeted Marketing Campaigns Based on Customer Segmentation
- Personalising Communication and Offers for Different Customer Segments
- Product Development and Service Enhancements Informed by Customer Profiles
- Aligning Sales Strategies with Customer Preferences

Section 6: Updating and Refining Customer Profiles

- Monitoring Customer Behavior for Changing Trends
- Using Customer Feedback and Surveys for Profile Adjustments
- Strategies for Keeping Customer Data Accurate and Up-to-Date
- Adapting Profiles for Emerging Market Segments

Section 7: Case Studies and Practical Applications

- Real-World Examples of Successful Customer Profiling

- Lessons Learned from Businesses Using Customer Profiles to Drive Growth
- Practical Exercise: Developing and Applying Customer Profiles for Marketing Strategies

Certificate Description

Upon successful completion of this training course, delegates will be awarded a Holistique Training Certificate of Completion. For those who attend and complete the online training course, a Holistique Training e-Certificate will be provided.

Holistique Training Certificates are accredited by the British Assessment Council (BAC) and The CPD Certification Service (CPD), and are certified under ISO 9001, ISO 21001, and ISO 29993 standards.

CPD credits for this course are granted by our Certificates and will be reflected on the Holistique Training Certificate of Completion. In accordance with the standards of The CPD Certification Service, one CPD credit is awarded per hour of course attendance. A maximum of 50 CPD credits can be claimed for any single course we currently offer.

Categories

Customer Service & Public Relations (PR), Sales & Marketing

Tags

Customer-focused Culture, Customer Profiling

Related Articles



Customer Profiling: Types, Benefits, Methods & Examples (2025)

Explore customer profiling: demographics, psychographics, behaviour, and more. Learn how businesses personalise marketing and practice ethically. Gain insights into real-world examples and the synergy with marketing automation. Discover benefits, methods, and ethics for enhancing customer relationships.