

How does segmentation help to achieve your goals?

Segmentation as part of your
account planning



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1

Why use segmentation?

Realizing a strategy starts with saying no, that includes saying no to customer segments.

You have limited resources: allocating the right resources to your sales network will determine the likelihood of realizing your strategy.

Segmentation is about allocating resources (people, budget, time, activities) to customers or accounts that are divided into different groups.



Every group has a different level of potential.

Harvard Business Review

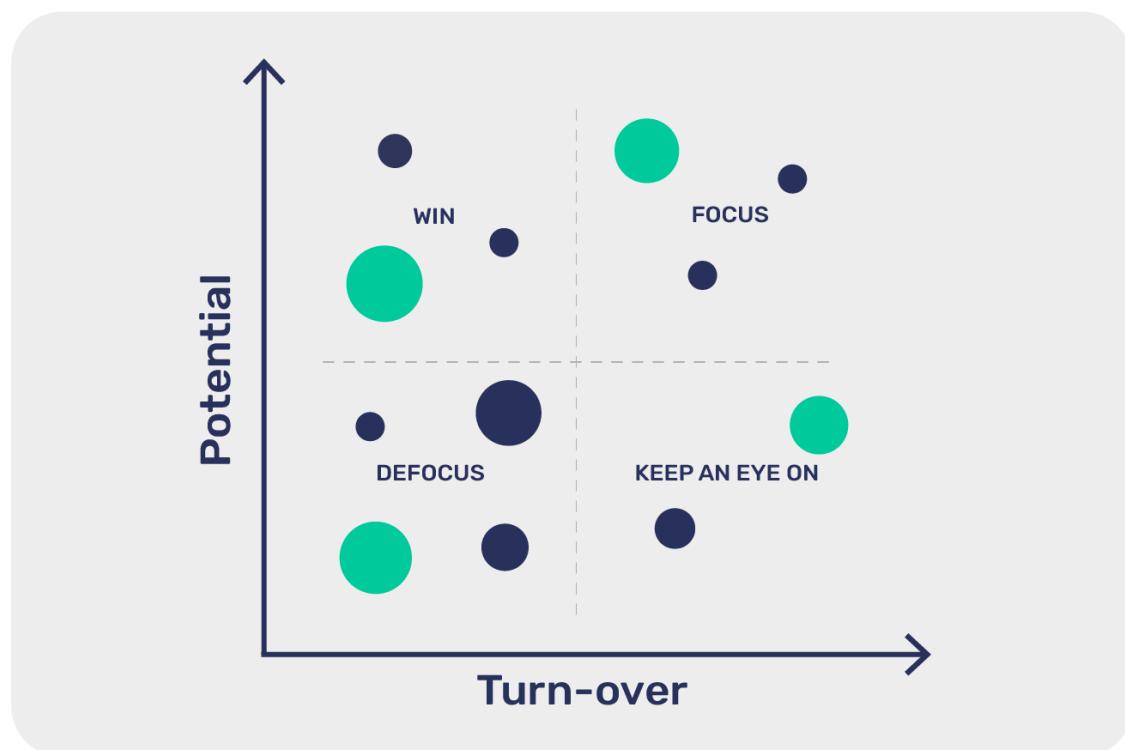
"Only 20% of managers say their organizations do a good job of shifting people across units to support strategic priorities.

The rest report that their companies rarely shift people across units (47%) or else make shifts in ways that disrupt other units (33%)."

Donald Sull, Rebecca Homkes, Charles Sull

2 What is segmentation?

You can segment your accounts based on quantitative or qualitative criteria.



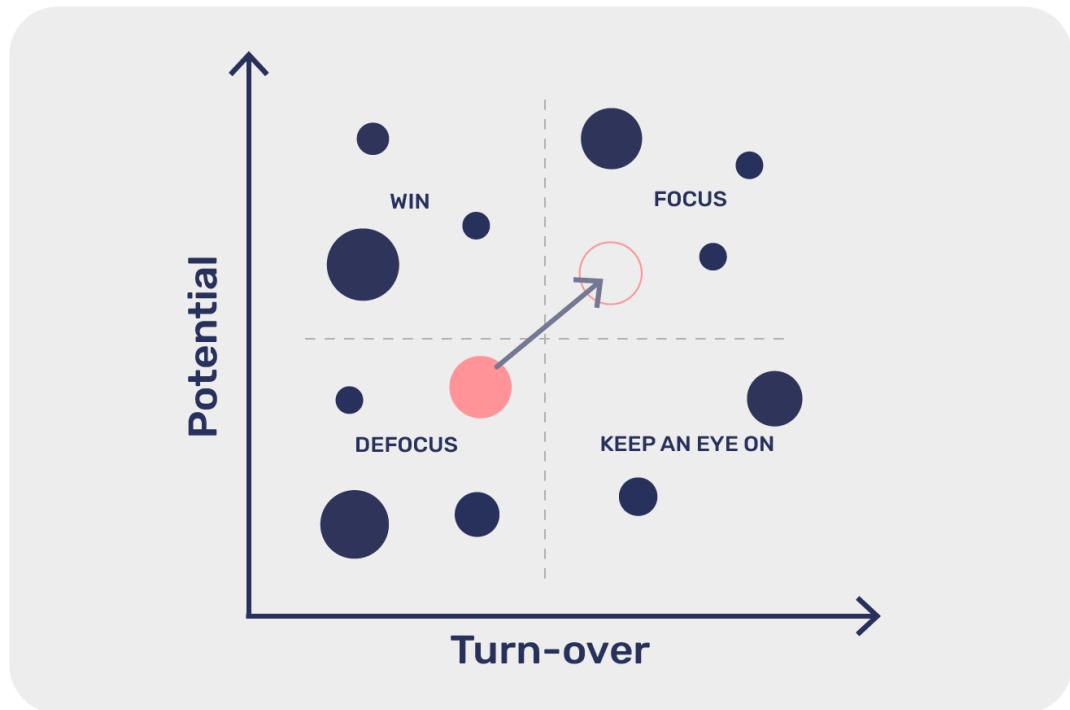
Making a segmentation based on criteria like turn-over and potential turn-over is a common way to segment.

3 How?

Start with easy criteria

Segment your accounts based on a few criteria.

When you make your first segmentation, don't spend too much time deciding on the data.



The most important step is to make choices, you can always re-allocate accounts to one segment or another later.

Criteria

Segments should help you to distinguish a **strategic approach towards a specific segment.**

You should be able to **separate different customer/partner needs in every segment**

Examples



Turn-over



Potential



Profile

Challenges

Once you have your segments, it's time to allocate resources:

- There is a limit of time
- There is a limit of resources
- There is a difference in service activities

4 Results



More focus

Segmentation helps you to say no.



More internal alignment

Segmenting your accounts provides an alignment in the entire organization (sales, marketing, support, finance, etc.,)



Resource control

Allocate resources in an objective way.



Achieve long term results:

Segmentation helps you to separate a long term plan from a short term plan.

The next step after segmentation is to determine clear objectives and key results.

Don't forget...

SEGMENTATION IS ONLY
EFFECTIVE IF YOU MAKE
CHOISES IN ALLOCATING
TIME, RESOURCES
AND SERVICE ACTIVITIES

- FRIE PÉTRÉ -



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