



## **Customer Profiling Governance and Application Training Course**

26 April – 7 May 2027  
Montreux

## Customer Profiling Governance and Application Training Course

**Ref:** 708\_154085 **Date:** 26 April – 7 May 2027 **Location:** Montreux **Fees:** 15000 Euro

### Overview

Customer Profiling Governance and Application Training Course is a 10-day intermediate course for customer insight analysts, CRM specialists, customer service managers, marketing operations professionals, and service improvement leads who leave with a Governed Customer Profile Portfolio. Participants build evidence-based customer profiles, segmentation logic, validation controls, and lifecycle routines that turn customer insight into service decisions. Agile Leaders Training Center frames customer profiling governance as accountable evidence work.

### Who Should Attend

- Customer insight teams responsible for evidence design and interpretation
- CRM teams responsible for customer data quality and profile maintenance
- Customer service teams responsible for differentiated service decisions
- Marketing operations teams responsible for segment activation rules
- Service improvement teams responsible for testing profile usefulness

The course assumes participants already use customer data or research at work and leaves out database engineering, campaign execution, broad CX strategy, and personality testing.

### Departments and Industries

The course supports departments and industries that use customer evidence to plan differentiated services.

- Customer insight, CRM, service operations, and marketing operations
- Banking, insurance, telecommunications, and digital services
- Retail, hospitality, logistics, and subscription services
- Healthcare services, education services, and membership organizations
- Professional services and outsourced customer operations

### Learning Objectives

By the end of this course, participants will be able to:

- Analyze profiling purpose, decisions, and evidence requirements
- Build governed customer variables and data-source maps
- Apply segmentation logic and profile construction methods
- Evaluate profile validity, bias, privacy, and actionability
- Use customer profiles in service planning decisions



- Prioritize profile maintenance and performance actions

## **Course Agenda**

### **Day 1: Profiling Purpose and Decisions**

- Customer Profiling Purpose Statement
- Service Decision Use-Case Canvas
- Profile User and Stakeholder Map
- Customer Profile Output Catalogue
- Profiling Scope Boundary Checklist

### **Day 2: Governance and Responsible Use**

- Customer Data Purpose Register
- Profiling Lawful-Basis Decision Record
- Data Minimization Review Checklist
- Profile Transparency Notice Map
- Human Review and Challenge Path

### **Day 3: Evidence and Data Sources**

- Customer Evidence Source Inventory
- Qualitative Interview Evidence Grid
- Survey Evidence Quality Screen
- Behavioral Data Event Dictionary
- Customer Record Provenance Map

### **Day 4: Variables and Classification**

- Demographic Variable Relevance Test
- Behavioral Variable Definition Sheet
- Needs and Preference Coding Frame
- Customer Value Indicator Matrix
- Sensitive Attribute Exclusion Review

### **Day 5: Segmentation Logic**

- Segmentation Hypothesis Canvas
- Rule-Based Segment Definition Table
- RFM Scoring Interpretation Guide
- Segment Distinctiveness Test
- Segment Assignment Decision Rules



## **Day 6: Profile and Persona Construction**

- Evidence-Based Profile Card
- Customer Persona Evidence Trace
- Needs and Barrier Summary
- Service Preference Pattern Map
- Profile Narrative Quality Checklist

## **Day 7: Validation and Bias Controls**

- Profile Accuracy Validation Plan
- Sample Coverage Diagnostic
- Proxy Variable Bias Review
- Vulnerable Customer Safeguard Check
- Profile Assumption Challenge Log

## **Day 8: Operational Activation**

- Profile-to-Service Action Matrix
- Frontline Profile Use Guide
- Customer Routing Rule Sheet
- Service Variation Control Record
- Profile Access Authorization Map

## **Day 9: Measurement and Lifecycle**

- Profile Actionability Scorecard
- Segment Stability Monitoring Chart
- Customer Feedback Validation Loop
- Profile Refresh Trigger Register
- Retention and Retirement Schedule

## **Day 10: Customer Profiling Governance Practice**

- Exercise: Audit a Profiling Purpose and Evidence Set
- Exercise: Construct and Validate a Customer Profile
- Exercise: Resolve a Bias and Governance Exception
- Exercise: Convert a Profile into Service Actions
- Capstone: Governed Customer Profile Portfolio

## **Practical Exercises**

The course uses banking, telecommunications, retail, and healthcare-service cases to connect customer evidence with governed action.



- Suggested activity: compare research and behavioral evidence before selecting profile variables.
- Suggested activity: test a segment and persona against accuracy, bias, and actionability criteria.
- Suggested activity: design service actions and frontline guidance for contrasting profiles.
- Suggested activity: create refresh triggers and retirement rules for an aging profile set.

## FAQs

### Who suits customer profiling governance training, and what does it assume?

Customer insight, CRM, service, marketing operations, and improvement practitioners suit the training; it assumes they already use customer evidence in operational work.

### How does customer profiling governance differ from marketing analytics?

Customer profiling governance controls how evidence becomes maintained, responsible profiles for service decisions, while marketing analytics more broadly measures audiences, campaigns, channels, and performance.

### What evidence should support an evidence-based customer profile?

An evidence-based customer profile should combine relevant customer records, observed behavior, qualitative research, survey findings, and clearly documented assumptions, with traceability to each profile claim.

### How should teams validate customer profiles?

Teams should validate customer profiles through source-quality checks, sample coverage, comparison with observed outcomes, customer feedback, bias review, operational testing, and scheduled refresh decisions.

### When should a customer profile be updated or retired?

A customer profile should be updated when evidence, behavior, service design, or decision needs change, and retired when it is inaccurate, unused, unsupported, harmful, or replaced by a validated profile.

## Conclusion

Participants leave with a Governed Customer Profile Portfolio containing purpose records, evidence maps, segment rules, profile cards, validation checks, service actions, and lifecycle controls. The portfolio replaces assumption-led descriptions with traceable customer evidence. It also gives teams a repeatable basis for updating profiles and approving their operational use.