



Customer and Market Understanding Foundation Training Course

1 – 5 March 2027
Montreux

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Ref: 742_156601 **Date:** 1 – 5 March 2027 **Location:** Montreux **Fees:** 7500 Euro

Overview

Customer and Market Understanding Foundation Training Course is a five-day foundation course for marketing, customer insight, product, sales, and service professionals who leave with a Customer and Market Insight Brief. Participants define research decisions and market boundaries, gather customer-needs evidence, segment customers, build evidence-based personas, map competitors, record demand signals, and combine findings into decision-ready market insight. Agile Leaders Training Center develops customer and market understanding.

Who Should Attend

- Teams responsible for gathering and interpreting customer evidence
- Professionals responsible for defining markets and target segments
- Product teams responsible for customer and competitor inputs
- Sales and service teams responsible for reporting demand signals
- Managers responsible for evidence used in market decisions

The course assumes participants contribute to customer or market decisions and leaves out campaign planning, sales techniques, customer journey design, satisfaction measurement, and advanced analytics.

Departments and Industries

The course supports departments and industries that need structured evidence about customers, competitors, segments, and market demand.

- Marketing and customer-insight functions
- Product and business-development teams
- Sales operations and customer-service units
- Retail and hospitality organizations
- Healthcare and professional-service organizations

Learning Objectives

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



- Apply a research-decision statement to customer and market questions
- Build customer-needs interview and evidence records
- Analyze market boundaries, segments, and demand signals
- Compare competitors through a structured market map
- Build evidence-based segment profiles and customer personas
- Evaluate findings in a Customer and Market Insight Brief

Course Agenda

Day 1: Research Decisions and Market Scope

- Research Decision Statement Canvas
- Customer and Market Question Register
- Primary and Secondary Evidence Map
- Market Boundary Definition Sheet
- Evidence Quality and Bias Checklist

Day 2: Customer Needs Evidence

- Customer Interview Guide Design
- Survey Question Review Grid
- Observation Note Capture Template
- Customer-Needs Statement Format
- Evidence Coding and Theme Matrix

Day 3: Segments and Personas

- Segmentation Variable Selection Grid
- Segment Attractiveness Screen
- Target-Segment Profile Card
- Evidence-Based Customer Persona
- Segment Assumption Validation Log

Day 4: Competitors and Demand Signals

- Direct and Indirect Competitor Map
- Competitor Offer Comparison Matrix
- Customer Alternative Analysis
- Demand Signal Evidence Register
- Market Insight Synthesis Board



Day 5: Customer and Market Insight Practice

- Exercise: Define a Research Decision and Market Boundary
- Exercise: Code Customer Evidence into Need Themes
- Exercise: Build a Segment Profile and Persona
- Exercise: Map Competitors and Demand Signals
- Capstone: Customer and Market Insight Brief

Practical Exercises

The course uses suggested activities drawn from retail, hospitality, healthcare, and professional services.

- Suggested activity: convert a business question into a research decision statement and evidence plan.
- Suggested activity: code interview notes into customer-needs statements and recurring themes.
- Suggested activity: select segmentation variables and prepare an evidence-based persona.
- Suggested activity: compare competitors, record demand signals, and prepare an insight brief.

FAQs

Who suits customer and market understanding training, and what does it assume?

Marketing, insight, product, sales, and service professionals suit the training; it assumes they contribute evidence to customer or market decisions.

How does customer and market understanding differ from digital marketing strategy training?

Customer and market understanding develops research questions, evidence, segmentation, personas, competitor maps, and demand signals rather than channel selection, campaign planning, content, or media performance.

How are customer needs identified in customer and market understanding?

Customer needs are identified by defining a research question, gathering interview, survey, observation, and desk evidence, coding recurring themes, and writing needs statements supported by evidence.

How does market segmentation support customer understanding?

Market segmentation groups customers through relevant variables, compares segment characteristics and attractiveness, and creates profiles that connect customer evidence with a defined market decision.



What belongs in a Customer and Market Insight Brief?

A Customer and Market Insight Brief states the decision, market boundary, evidence sources, customer needs, segments, personas, competitor alternatives, demand signals, assumptions, and implications.

Conclusion

Participants take back a Customer and Market Insight Brief supported by research questions, market boundaries, customer-needs evidence, segment profiles, personas, competitor maps, and demand-signal records. It changes scattered observations into traceable market evidence. The brief helps teams separate findings from assumptions and frame decisions around defined customers and market conditions.