



Customer Analytics and Predictive Insights Training Course

6 – 10 September 2027
San Diego



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Overview

Customer Analytics and Predictive Insights Training Course is a five-day professional course for customer, marketing, experience, CRM, digital, sales operations, business intelligence, and data functions who leave with a Customer Insight Decision Pack. Participants connect customer measurement design, data quality, segmentation, cohort analysis, journey analysis, churn indicators, customer lifetime value, propensity interpretation, experiments, and model monitoring. The course addresses insights that do not lead to accountable action. Agile Leaders Training Center develops customer analytics and predictive insights for decision use.

Who Should Attend

- Customer analytics functions responsible for measures, segments, behavior patterns, and insight delivery
- Marketing analytics functions responsible for targeting, campaign evaluation, retention, and value decisions
- Customer experience functions responsible for journeys, friction signals, feedback, and improvement priorities
- CRM and digital functions responsible for customer profiles, interactions, audiences, and activation rules
- Sales operations functions responsible for opportunity signals, prioritization, and performance interpretation
- Business intelligence and data functions responsible for governed datasets, models, reports, and monitoring

The course assumes participants can interpret tables, rates, trends, and customer processes, and leaves out introductory statistics, production model coding, platform administration, and data engineering.

Departments and Industries

The course supports departments and industries that use customer behavior evidence to prioritize service, marketing, retention, and growth decisions.

- Customer, marketing, CRM, digital, sales operations, analytics, and business intelligence departments
- Retail, ecommerce, loyalty, delivery, and subscription businesses
- Banking, insurance, telecommunications, and utility services
- Healthcare, travel, hospitality, and education services
- Public-service, membership, and nonprofit organizations

Learning Objectives

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

- Build a customer measurement map and data quality checklist
- Apply segmentation, RFM analysis, cohorts, and journey analysis
- Analyze retention, churn, and customer lifetime value indicators
- Evaluate propensity outputs, thresholds, validation, bias, and drift
- Compare experiment results and prioritize customer actions
- Build an evidence-based customer insight narrative

Course Agenda

Day 1: Frame Customer Measurement

- Customer Decision Question and Measurement Map
- Customer Profile, Event, Transaction, and Feedback Inventory
- Identity Resolution and Observation Unit Checklist
- Customer Data Quality and Missingness Assessment
- Metric Definition, Denominator, and Time-Window Register

Day 2: Segment Customers and Journeys

- Segmentation Purpose and Feature Selection Brief
- RFM Recency, Frequency, and Monetary Analysis Matrix
- Cohort Definition and Retention View
- Customer Journey Stage and Friction Map
- Segment Validation and Actionability Checklist

Day 3: Interpret Predictive Customer Signals

- Retention and Churn Indicator Tree
- Customer Lifetime Value Assumption Sheet
- Propensity Score and Decision Threshold Matrix
- Model Validation, Bias, and Error Interpretation Guide
- Prediction Drift and Monitoring Checklist

Day 4: Convert Insights into Decisions

- Experiment Hypothesis and Success Measure Card
- Control, Treatment, Lift, and Uncertainty Readout
- Customer Insight Evidence Narrative
- Action Priority, Value, Risk, and Effort Matrix
- Decision Owner and Learning Feedback Log



Day 5: Practice Customer Insight Delivery

- Exercise: Repair a Customer Measurement Definition
- Exercise: Build RFM Segments and a Cohort View
- Exercise: Interpret Churn and Propensity Signals
- Exercise: Present an Experiment and Action Priority
- Capstone: Customer Insight Decision Pack

Practical Exercises

The course uses suggested activities based on retail, banking, telecommunications, healthcare, and subscription-service scenarios.

- Suggested activity: define a customer decision question, inventory data, and test measure quality.
- Suggested activity: build segments, compare cohorts, and identify journey friction requiring investigation.
- Suggested activity: interpret churn, lifetime value, propensity, validation, bias, and drift evidence.
- Suggested activity: read an experiment, prioritize actions, assign an owner, and define a learning loop.

FAQs

Who suits customer analytics and predictive insights training, and what does it assume?

Customer, marketing, experience, CRM, digital, sales operations, business intelligence, and data functions suit the course; it assumes participants can interpret tables, rates, trends, and customer processes.

How does customer analytics differ from general data analytics training?

Customer analytics organizes measures around profiles, behavior, segments, cohorts, journeys, retention, value, propensity, experiments, and customer actions, while general data analytics training applies broader methods across many business subjects.

What makes a customer segment actionable?

An actionable customer segment has a defined purpose, stable membership logic, measurable size, interpretable features, reachable channels, distinct needs or behavior, an assigned treatment, an owner, and a measure for testing the resulting decision.

How should teams use predictive customer insights?

Teams should use predictive insights as decision evidence, checking the target, observation window, validation, errors, bias, threshold, business cost, drift, and available action before assigning treatment or resources.



How do experiments strengthen customer insight decisions?

Experiments strengthen decisions by defining a hypothesis, comparison, success measure, assignment method, observation window, and uncertainty, then separating measured treatment effects from descriptive patterns that may have other explanations.

Conclusion

Participants take back a Customer Insight Decision Pack containing measurement definitions, data checks, segments, cohorts, journey friction, churn and value indicators, propensity interpretation, experiment readouts, action priorities, and monitoring. It changes isolated analysis into traceable customer decisions. The pack connects evidence, assumptions, actions, owners, and learning.