

Rooting your business in the customer: A grassroots guide to segmentation

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TOMORROW
BEGINS TODAY



NatWest

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1

The challenge: Deliver personas in 6 weeks

2

What we learnt from the experience

3

How to kick start your project today

From beauty salons to online boutiques, dentists to craft breweries, Tyl is here to help UK businesses take payments

We were challenged to deliver actionable personas to the business in only 6 weeks

Product, Marketing, Strategy, Customer, Sales & wider bank teams

We adopted an agile working style and set milestones



Who are our customers and prospects?



120+ stakeholders



No budget



6 weeks to deliver

The business knew it needed a segmentation but didn't know 'how' to go about it

We relied on repurposing insight and critical evaluation of existing data

The first task is to understand what you're doing and why you're doing it



Continue to bang the drum with stakeholders, what it is and why we are doing it





This is how we started looking at data...





Kick start your segmentation with a toolbox of communication, work structure and stakeholder engagement

Communication

 → Used for collaborating on the project

 → Short check-ins to support productivity

 → Developed a persona stakeholder hub

 → Used for stakeholder engagement sessions

Ways of working

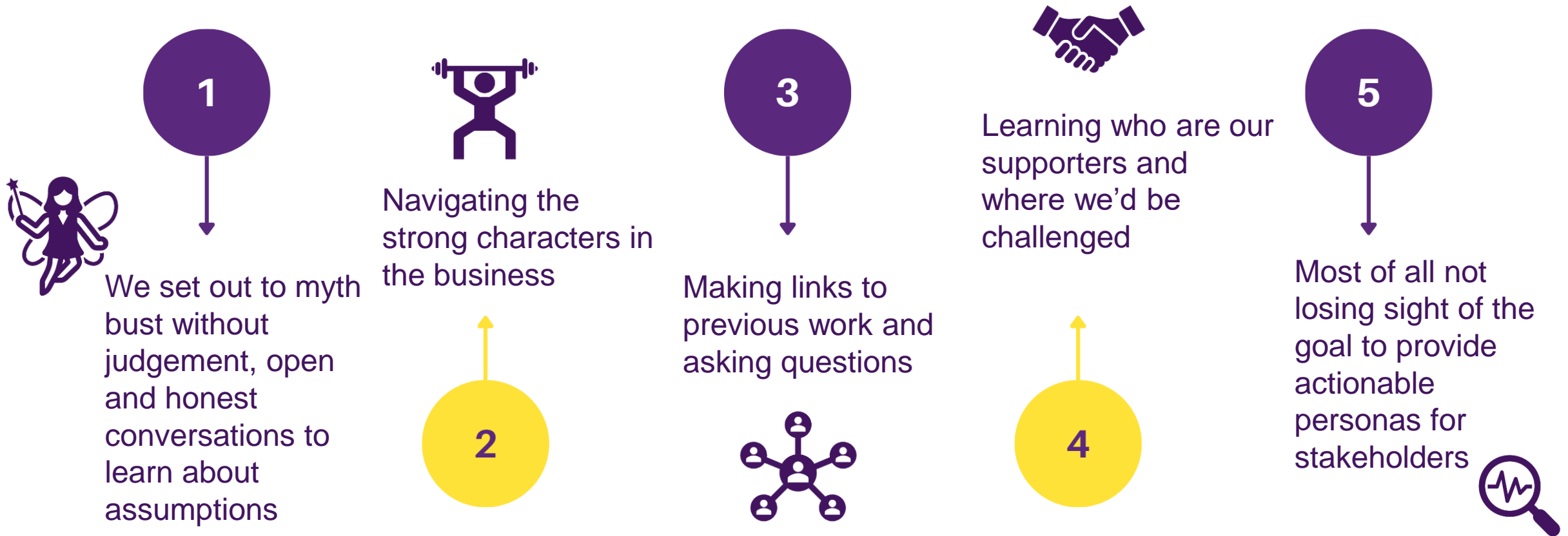
-  Agree a working rhythm and vision
-  15min scrum each day and 1hr reflection sessions per week
-  Calendar prioritisation exercises to align efforts
-  Set milestones and celebrate the successes
-  Zoom with cameras on and get to know each others skillsets

Navigate stakeholders & insight

-  Map out key stakeholders and know who are distracting
-  Opening the right doors, being transparent sharing plans and ask for feedback
-  Know what data you have access to and link it to overall goals and metrics
-  Build relationships with research partners

Keep challenging stakeholders: How will you use the personas?

Before you think about data. Don't underestimate the power of stakeholder intelligence



Ultimately we wanted to avoid stakeholder rejection of the new personas and make them feel part of the journey

Repurposing insight was much more than data itself



Asking uncomfortable questions that spurred conversations and connections



We became the segmentation experts!



Stakeholder knowledge development



Ability to challenge and cut the noise

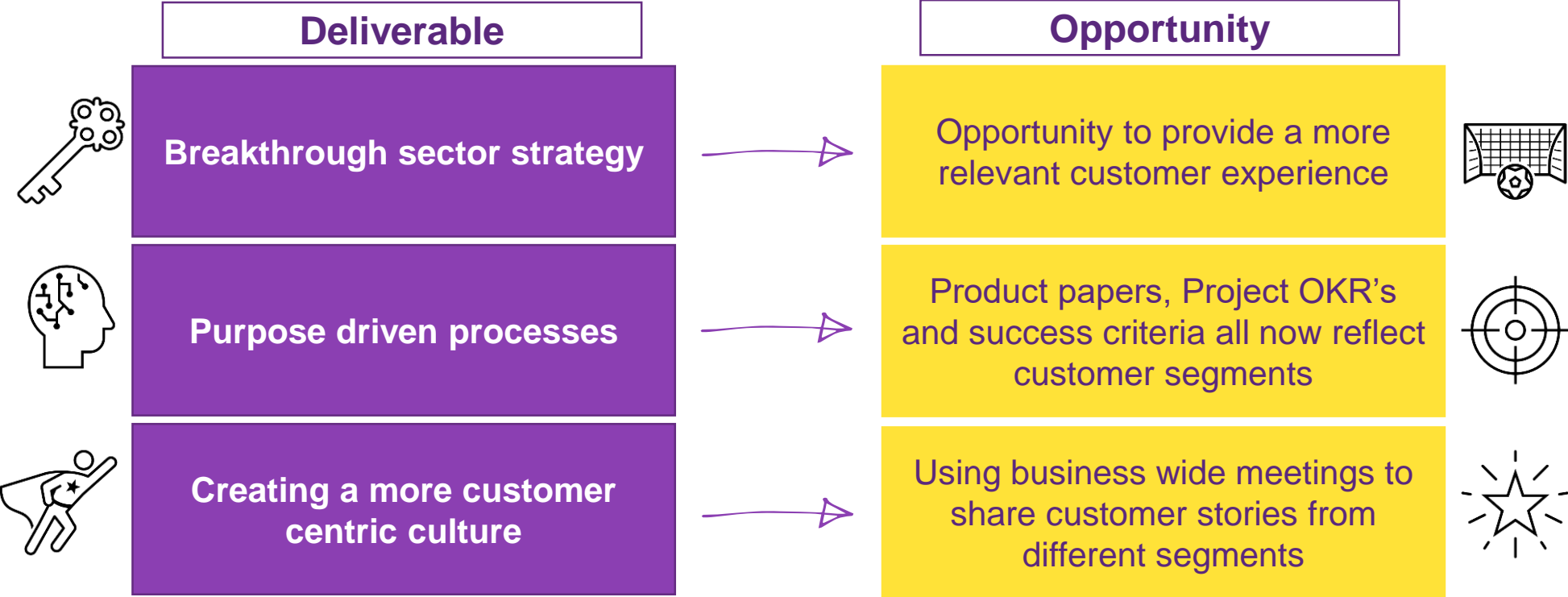


Being self critical, dedicated reflection time and accepting of feedback

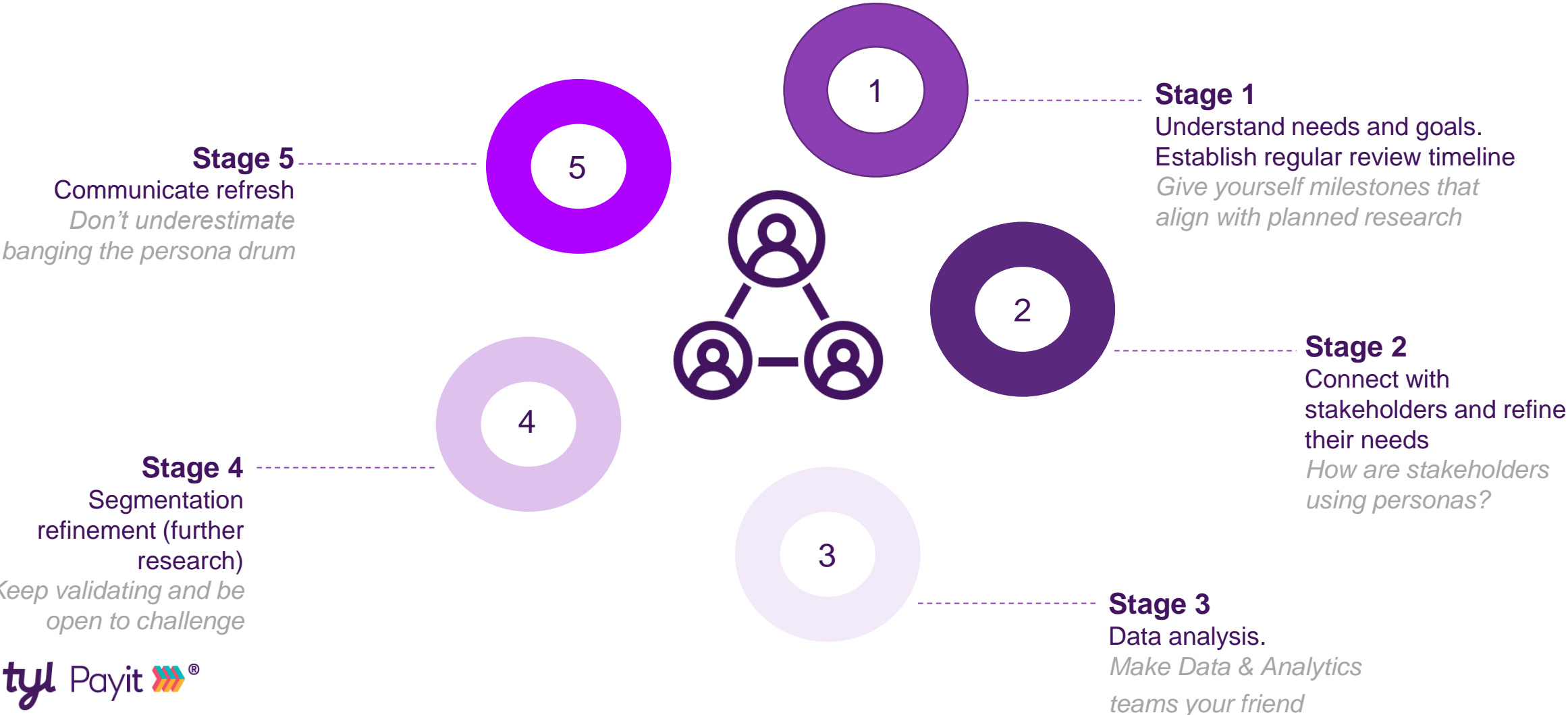


Developing our own path to one truth

Getting it right can unlock new ways to understand and better serve your business

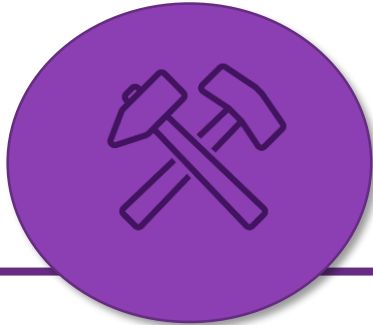


Segmentation is a never ending story; to stay relevant it needs regular reviews and updates



Embedding yourself into the segmentation analysis will unlock opportunities for you to learn and connect with the business

Key advice to kick start your segmentation journey



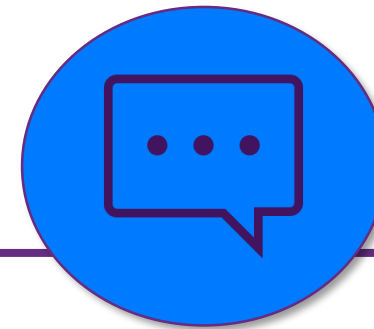
Build your own Toolbox

Be open to changing **how you work** and listen to stakeholders before you act. But don't get distracted by those who take you off track!



Become a Customer Expert

Embrace your new skill set by sharing learnings with the business. You will **become a trusted advisor** to stakeholders



Create a Shared Language

Personas give a **universal language** that helps everyone think about one customer truths and myth bust assumptions!

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