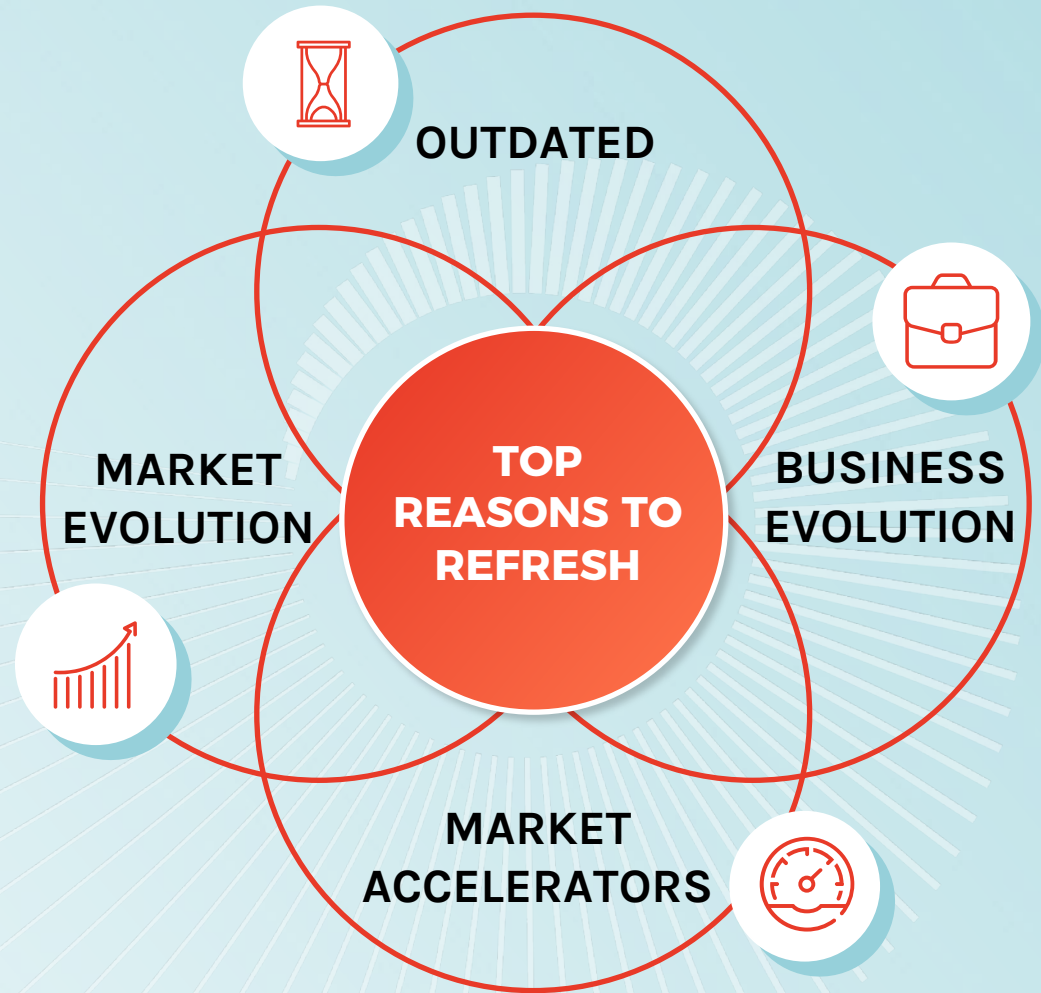




HOW A
SEGMENTATION REFRESH
**IGNITED BRAND
GROWTH**

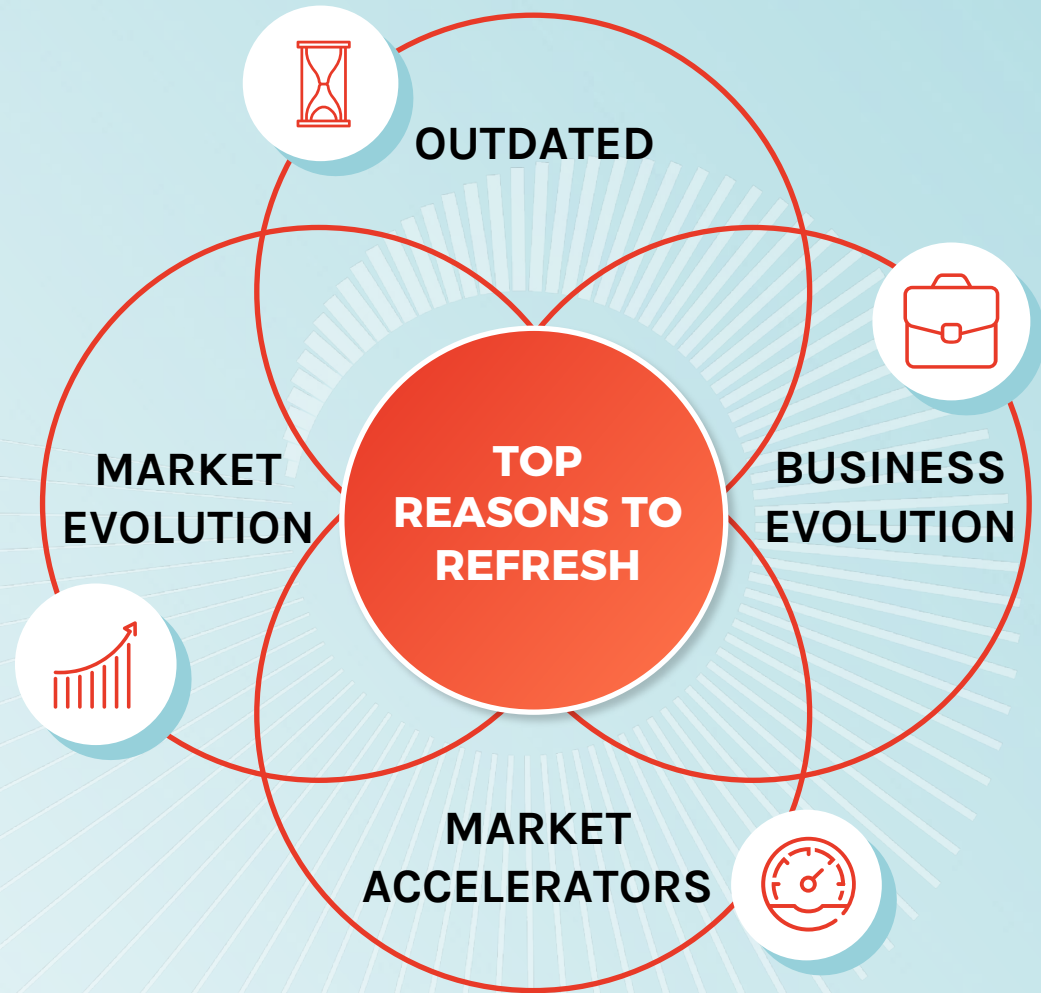
VITAL FINDINGS

To Refresh or Not to Refresh Your Segmentation That is the Question



**THE CHALLENGE
FOR OUR CLIENT:**

**All of the
Above**



For a Financial Services Company, a Rapidly Evolving Landscape was an Indicator for a Refresh

GenX entering retirement

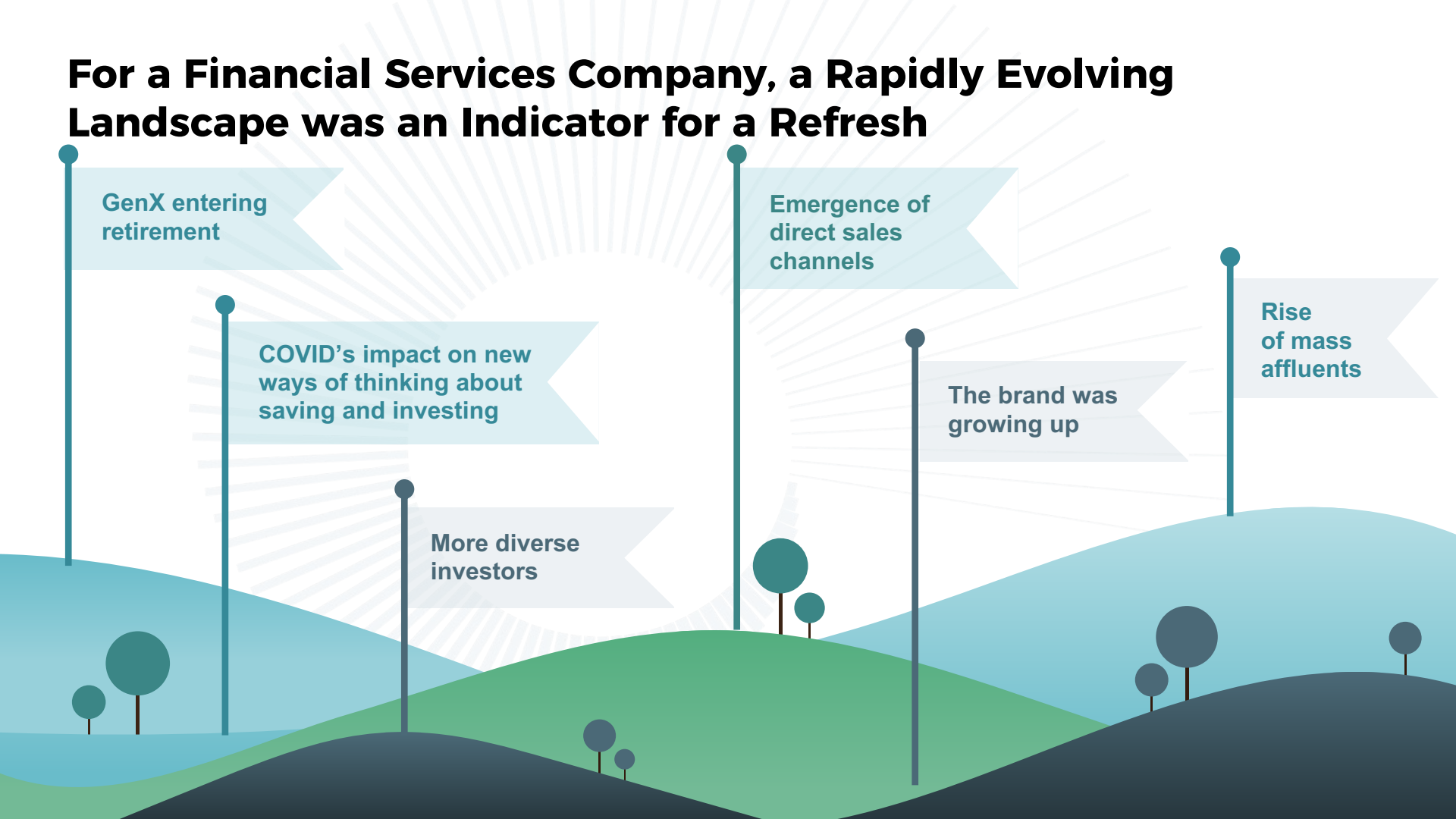
COVID's impact on new ways of thinking about saving and investing

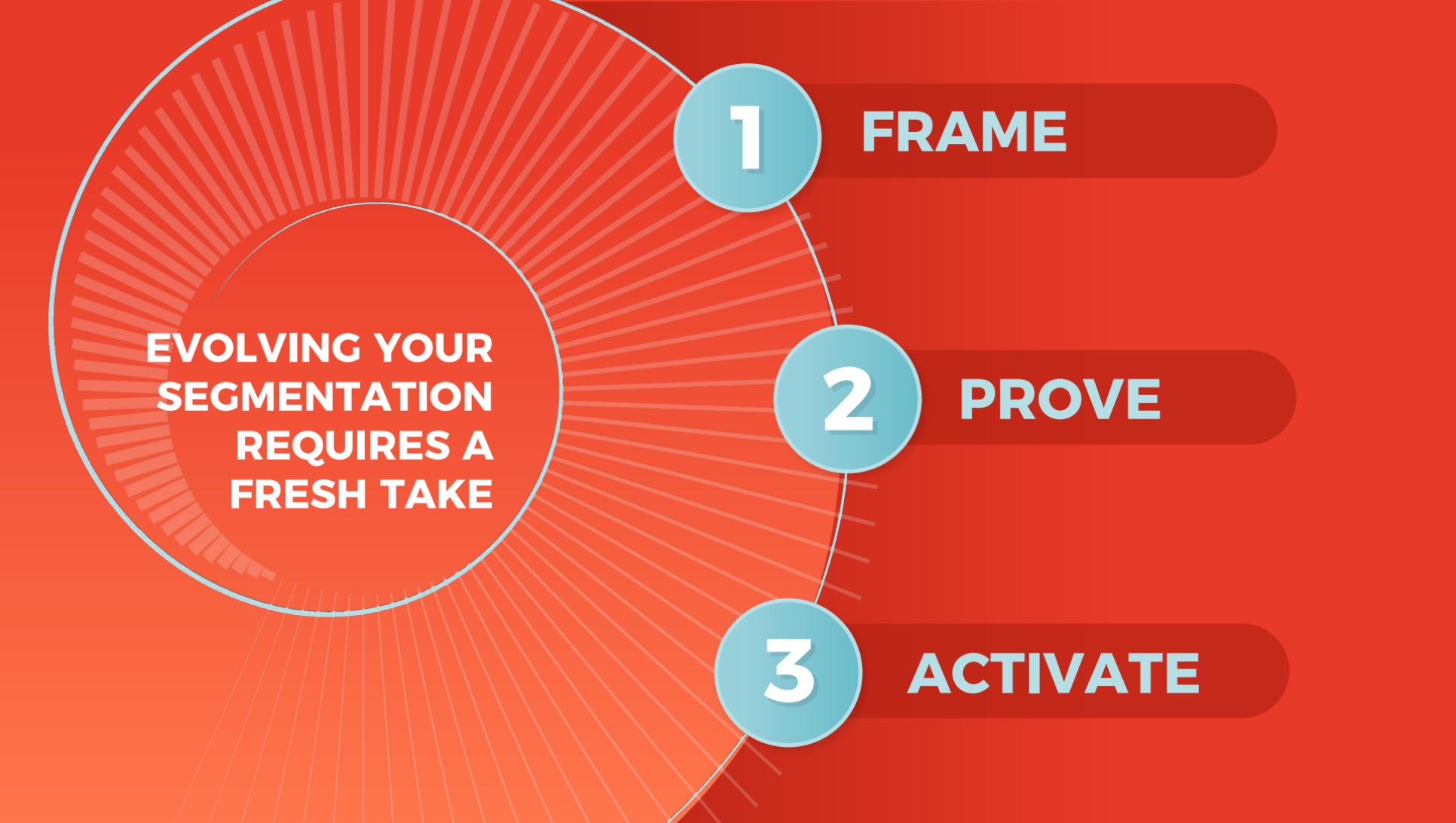
More diverse investors

Emergence of direct sales channels

The brand was growing up

Rise of mass affluents





**EVOLVING YOUR
SEGMENTATION
REQUIRES A
FRESH TAKE**

1

FRAME

2

PROVE

3

ACTIVATE

FRAME

REVISIT WHO'S IN
THE MARKET NOW



Know the Trends:

Understand the **evolution** of what is happening now and what's **projected to happen** to determine where to focus your segmentation

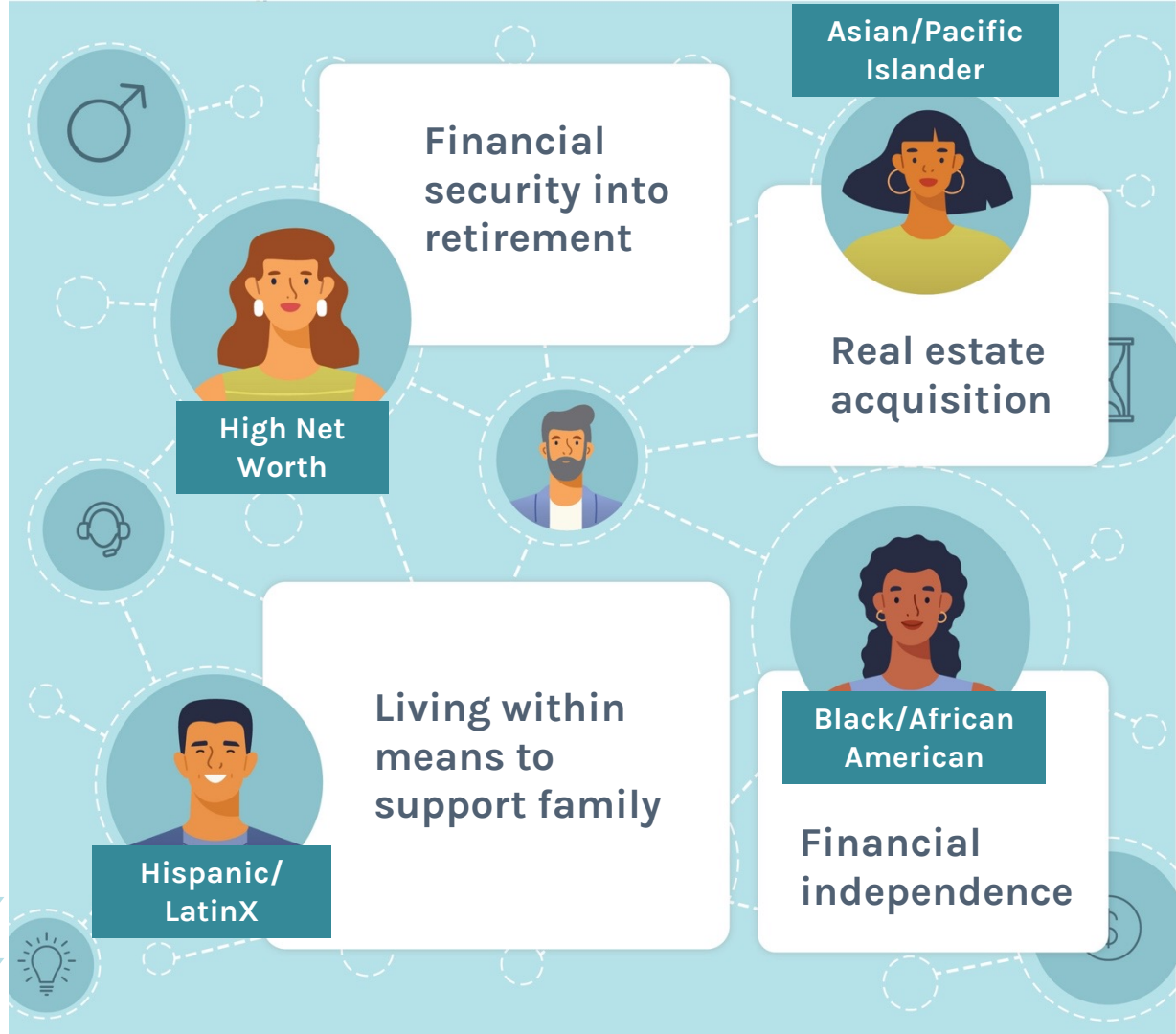


FRAME

Go Deep with Current & Potential Audiences:

Immerse to pinpoint
nuanced ways the
market has shifted

This will frame the
segmentation design



Define the sample frame **BEFORE** you segment

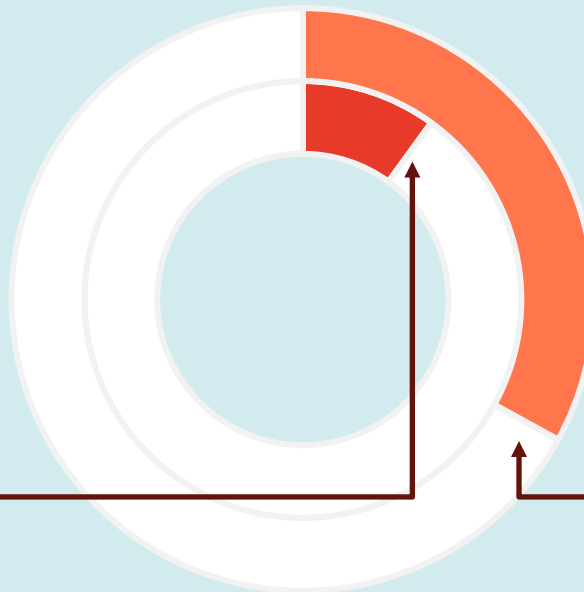
Where We Started

2015 Qualifications

- Assets of \$250k+
- Must work with and value a Financial Planner

PREVIOUS IR: **10.5%**

Exploratory Quantitative to
Define Addressable Audience



Where We Landed

2021 Qualifications

- HHI of \$75k+ & Liquid Assets of \$100k+
- Primary/shared decision making for household

NEW IR: **33%**

Zoom in vs. Zoom out

Fits Now

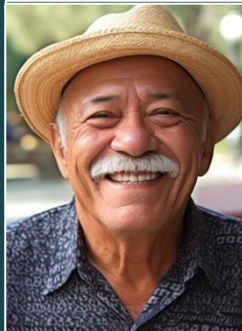


Future Opportunities

Fits Current Business Model



Segment
1



Segment
2



Segment
3

Low Hanging Fruit With Slight Evolution



Segment
4



Segment
5

Extra Effort



Segment
6

PROVE

VALIDATE YOUR
SEGMENTATION IN
THE MARKET



PROVE

Validate It In the Market

Take your segmentation to the market to gut-check it



"I think you guys are dead on with your groups. I don't know how you guys did this. This speaks loud to how we structure our business... I could almost put each group in one of the four areas that we have created." –

Financial Professional



ACTIVATE

CREATE ENERGY
AROUND THE NEW
MARKET VIEW



ACTIVATE

House Rules for Activation

PRE-PLAN

Create formal plan
BEFORE you start. Define
who, what where, when, why.

INFORM

Continuous touch points
along the journey only
benefit you in the end.

SET EXPECTATIONS

Tell stakeholders how this
helps and that you'll bring
them along for the ride.

ALIGN

At critical junctures
and decision points.

DO NOT BE AFRAID

Bring stakeholders in.
They will feel invested.

BE FLEXIBLE

Do not expect a perfect
project with a bow wrapped
around it. Go with the flow.



Build anticipation

- ✓ Communication plan.
- ✓ Alignment conversations.
- ✓ Insights teasers (example newsletter at right).

VITAL FINDINGS

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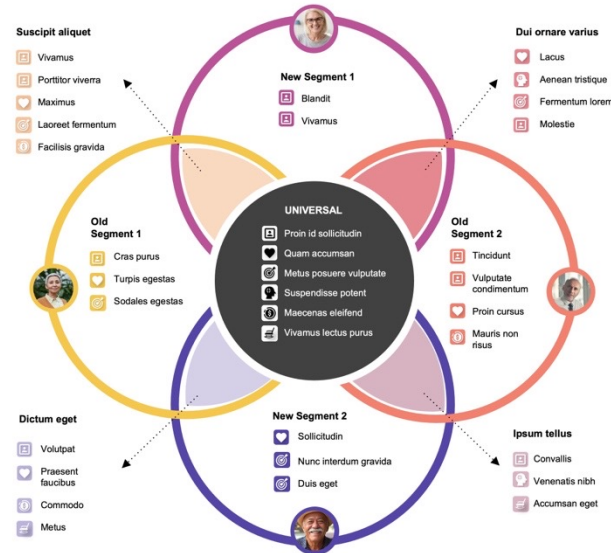
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Connect the dots

- ✓ Be clear on what changed.
- ✓ Connect to existing insights.
- ✓ Infuse segments into future strategic work.

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Make it relatable

- ✓ Humanize the segment.
- ✓ Analytic frameworks.
- ✓ Storytelling devices.



ACTIVATE

Capture attention

- ✓ Use creativity.
- ✓ Use design.
- ✓ Use immersion.

TODAY'S GOAL

GET TO KNOW YOUR NEW SEGMENTS!



ACTIVATE

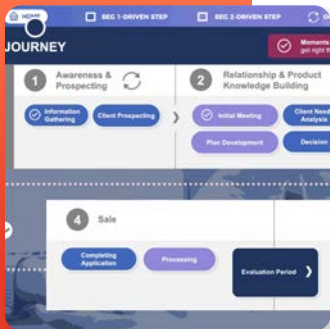


**SEGMENT
IMMERSIONS**

**SEGMENT
WORKSHOPS**



**Don't Quit:
Activation
STARTS at the
rollout**



**INTERACTIVE
DELIVERABLES**

**SEGMENT
PLAYBOOKS**





THE OUTCOME PLUS OUR TOP TIPS

*"I am still getting comments today about how much people enjoyed yesterday's interactive presentation. **People are telling me they left feeling energized and wanting to learn more.** It doesn't get any better than that. You all really set the bar on how to successfully introduce a ton of data to engage people with short attention spans. **We'll be using this approach as a case study "best practice" going forward.**" - Head of Insights*

Tips to Refresh Your Segmentation

Know when it's time.

Consider these two questions: Has your business changed since your segmentation was done? Have market conditions evolved?

Embrace the process.

Flexibility, openness and continuous alignment are needed as you infuse a refreshed segmentation into your organization.

Frame your potential market.

Examine market trends, characteristics and consumer needs to determine whether to zoom in or zoom out.

Test drive your new segments.

Segments should feel like common sense. Gather feedback to make sure they pass the sniff test.

Create an activation plan.

Having an activation plan that's adapted to your company's working culture is critical. Use creative formats and tools to break the information down, to show what's changed, to build energy and to create staying power.

QUESTIONS?

LET'S CHAT!

BETH.OSHAUGHNESSY@VITALFINDINGS.COM

