



Meridian West

Case study:

**Achieving client-focused change
through market segmentation at
Citation**



Citation's objectives

Citation provides SMEs with HR and Health & Safety support and expertise. Since its beginnings in 1995, the business had prospered and grown to employ 490 staff serving over 10,000 customers. Andrew Pumphrey, the Chief Marketing Officer, realised that to maintain growth it was essential to understand their client motivations, how they perceive Citation vs its competitors and how to target marketing messages to appeal to their client base.

One of the key challenges was to understand how Citation's approach needed to be tailored to different client segments. Andrew asked Meridian West and turntwo to help.

Combining customer research with advanced statistics and behavioural insights

Together, the teams from Citation, Meridian West and turntwo created an innovative programme. We used an online survey to collect insights from 591 Citation clients to understand their needs and considerations as clients. This data was used to create a customer segmentation using the statistical technique of cluster analysis. Four segments were identified – "the Box Tickers", "the DIYers", the "Convenience Seekers" and the "Comfort Seekers". A series of focus groups provided qualitative feedback to help shape and refine the segments.

We created client personas based on the segments which brought the data to life through realistic and relatable descriptions of what an individual client might think and feel. The team then worked with a specialist in behavioural science to identify the inherent cognitive biases that influence what we think and what we do. For each client segment, the team developed a client journey map and a communication plan to guide Citation's approach to their different client groups, transforming insight into action.

The impact

The analysis showed that Citation had an excellent reputation for quality, and its staff were highly regarded by clients particularly for their commercial, pragmatic advice. However, there were opportunities for further growth and personalisation.

Using the recommendations from Meridian West and turntwo, Citation refined its brand proposition, revamped its website, and improved its on-boarding process and online platform. Prospective clients can now be directed to content which is tailored to their segment, ensuring that marketing messages are relevant and compelling. Client personas have also been used to good effect in skills development for Citation sales staff, providing relatable, humanised ways to explain the data-driven segments.

The results have been positive. According to Andrew Pumphrey of Citation, "the research has provided real focus and delivered value for Citation. The early results have been encouraging as the website and content has helped to increase the numbers of new customers that we have been able to attract through Inbound channels. We have also utilised insights from the research to inform the delivery of additional services to our client base, which have proved very successful."