

Tools for Building A Better B2B Customer Engagement Strategy

Making Powerful Use of *Both* Segmentation & High Value Targeting

B2B sales and marketing teams have access to more customer signals than ever before, yet most commercial organizations are working with only *one* of the two data-rich, analytical frameworks needed to turn those signals into action—*either* Segmentation or High Value Targeting (HVT). There are, in fact, compelling reasons for using *both* to optimize strategy and execution.

A critical problem lies in the misconceptions around what each one accomplishes. Many treat HVT as simply the activation step that enables you to find and reach your most attractive target segments. That view devalues both frameworks and, more importantly, leads organizations to underinvest in one or the other. Segmentation and HVT are doing meaningfully different analytical work. Understanding the distinction, and knowing when it matters, are some of the more consequential choices a commercial team can make.



Used together, these two frameworks answer the most fundamental questions in commercial strategy: who deserves our investment and how should we engage them? Alone, each framework falls short.

Segmentation: A Strategy for Understanding and Engagement

► The Premise

Segmentation organizes a broad, heterogeneous universe into a smaller number of meaningfully distinct clusters based on shared behaviors, purchasing patterns, product preferences, and the attitudes and orientations that drive those behaviors (i.e., decision heuristics, goals, unmet needs, and business context). The desired outcome is actionable archetypes with direct implications for message strategy, product positioning, channel mix, and customer experience design.

► The Process

While segmentation can be built from various types of data, it is most powerful when deeply grounded in primary research. Attitudinal and psychographic data capture the ‘why’ behind behavior in ways that transactional data alone cannot. Primary research guides the statistical structure of the framework and gives it depth, maximizing the motivational coherence and commercial relevance of the resulting segments.

► The Problem

Because attitudinal data are collected from a survey research sample rather than the full universe, scaling segmentation to the entire customer and prospect database requires a model that links segment membership to observable secondary data variables like firmographics, behavioral signals, and CRM data. The strength of the linkage determines how effective the deployment will be. Where primary and secondary data align tightly, the model performs well but there is typically meaningful divergence, as we should expect. Segmentation’s reputation for not delivering commercial value in some quarters reflects, in good part, the mistaken *presumption* that alignment should and will be tight, leading marketing teams to pin unrealistic hopes on segmentation alone as an activation tool.

AI and ML are enhancing this alignment considerably, enabling more efficient dimension reduction, more nuanced clustering, and a segment assignment process that updates dynamically as new signals emerge rather than remaining static between research cycles. But segmentation needs the support of another framework to fulfill its strategic role.



Segmentation has been chronically underutilized in B2B — not because it doesn’t work, but because organizations conflate it with targeting and expect it to answer questions HVT is better equipped to address.

High-Value Targeting: A Framework for Focus

► The Premise

High-value targeting has been used most extensively and most effectively in the pharmaceutical industry, where the volume of customer and prescriber data has long exceeded what virtually any other sector can match. For decades, well before today’s data abundance, commercial teams in that sector developed what became known as *deciling*: ranking physicians by practice size and prescribing volume to prioritize field coverage. The logic was straightforward and defensible: concentrate resources on the customers with greatest propensity and potential to deliver revenue.

► The Process

Modern HVT frameworks can integrate a rich set of inputs – revenue potential, growth trajectory, competitive position, engagement signals, network influence, and other kinds of enterprise data – taking the process from purely volume-based tiering to a more complex stratification system. AI now allows organizations to weight these variables dynamically and identify not just who is buying today, but who is most likely to respond to incremental investment tomorrow, optimizing for future leverage, not just current volume.

► The Problem

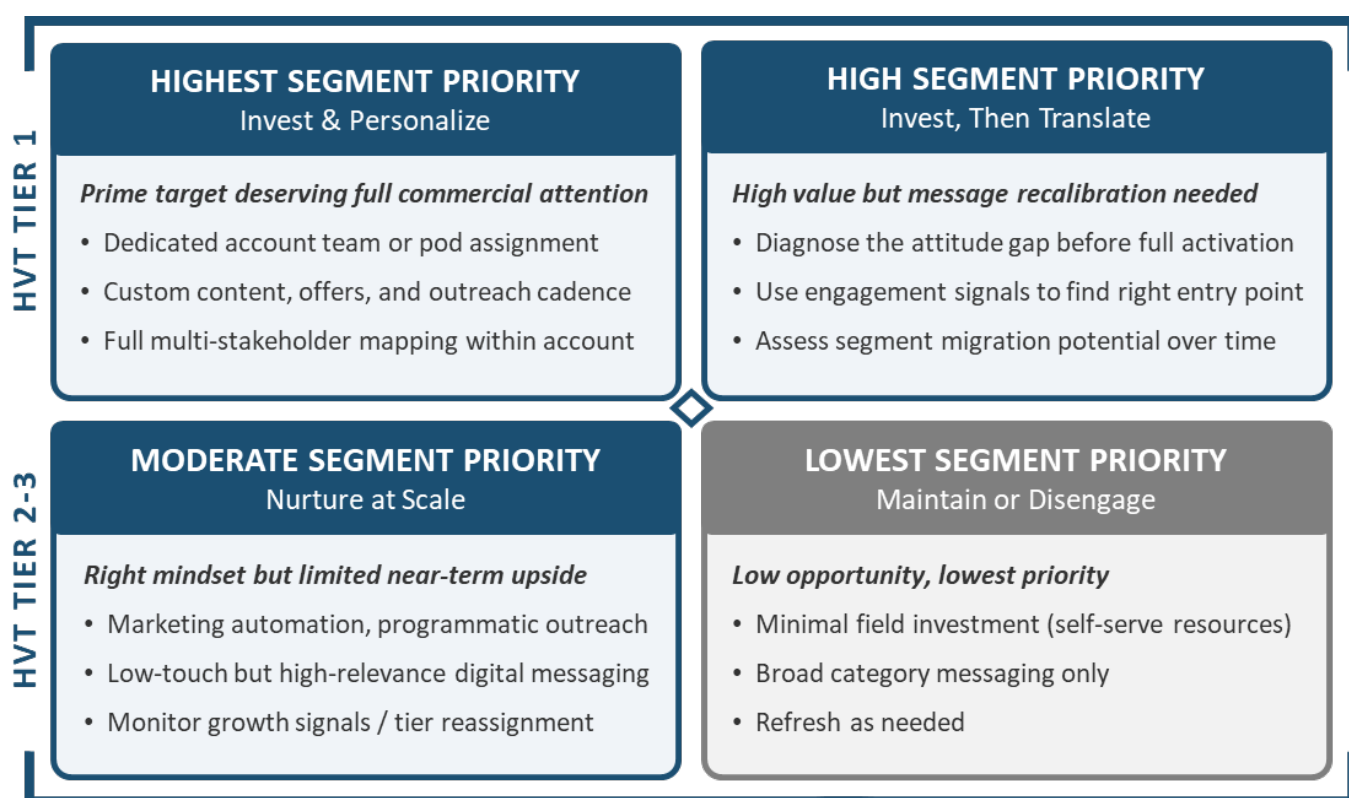
HVT alone provides no insight into motivation, and no strategy for turning lower-volume accounts with genuine potential into users and advocates. While HVT has evolved into a more nuanced framework that helps overcome those limitations, it still does not directly incorporate all the insights that would help further prioritize customers most receptive to your value proposition and customize messaging to motivate them or overcome barriers. Two high-priority accounts can have entirely different decision-making styles, unmet needs, and receptivity. Generic messaging applied uniformly across a high-value account list is one of the most common (and most costly) failure modes in B2B commercial execution.



HVT solves the resource allocation problem. It does not solve the content and persuasion problem. That's the role for segmentation.

The Integration Imperative: Where Segmentation Meets HVT

Segmentation provides an indispensable complement to HVT. A segmentation tells you what each type of buyer cares about, what problems they have, what solutions they resist, and what kind of message moves them. By implication, that analysis pinpoints segments you may be best equipped to serve. HVT tells you which accounts deserve your full effort. The integration of the two produces greater complexity, but it will also reward you with greater granularity by creating a customer value/alignment matrix that shows you who you are best equipped to service and what sort of marketing treatment will engage them best. The visual below illustrates how the two together provide greater value.



Successful commercial strategies don't choose between the two. Segmentation and HVT are most powerful when designed as complementary layers of the same go-to-market system.

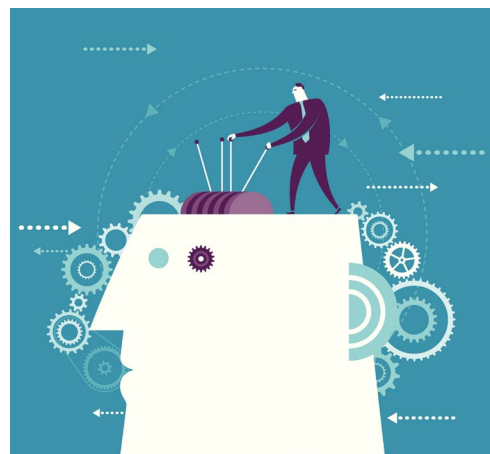
How AI Strengthens Both Frameworks

AI and advanced ML are giving both these tools even more power – alone and together.

On the segmentation side, AI enables more efficient dimension reduction, more nuanced clustering, and scoring models that link attitudinal insights to observable behavioral data with increasing precision. Segment assignments can be updated continuously rather than remaining static between research cycles. And early-stage AI applications are beginning to “humanize” segment archetypes as queryable synthetic respondents, a development that could shorten the lag between segment creation and content strategy.

On the HVT side, AI allows organizations to move beyond volume-based ranking toward true opportunity modeling: integrating engagement patterns, competitive dynamics, network effects, and growth trajectory to identify who is most likely to respond to investment tomorrow, not just who is buying today.

Ultimately, however, what drives the success of both frameworks is the quality of the data that informs them. HVT may be built largely on secondary data, but the enabler of effective use of HVT and the bedrock of segmentation remain high-quality primary research.



Organizations getting the most from both frameworks rely on a continuous flow of insights and treat AI as a force multiplier for strategic thinking

About The Author



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Trish is a NAXION senior practice leader whose distinguished consulting career has focused on the application of cutting-edge tools to understand and improve the customer experience and the development of marketing strategies that create more powerful connections between customers and brands. She is deeply engaged in supporting the B2B Sector, leveraging her expertise to reimagine their customer experience strategies to build trust, enhance empathy, and deliver more meaningful and effective interactions.

About NAXION

NAXION is a nimble, broadly resourced boutique that relies on advanced research methods, data integration, and sector-focused experience to guide strategic business decisions that shape the destiny of brands. Our century-long history of innovation has helped to propel the insights discipline and continues to inspire contributions to the development and effective application of emerging data science techniques. For information on what's new at NAXION and how we might help you with your marketing challenges, please visit <https://www.naxionthinking.com/>.