

# UNLOCKING CUSTOMER RETENTION WITH SEGMENTATION: A REVOPS PLAYBOOK FOR HIGH-GROWTH SAAS

## INTRODUCTION

Customer retention is a defining challenge for high-growth SaaS companies. While acquiring customers is essential, sustaining long-term relationships is the foundation of sustainable revenue growth. By applying the **Jobs-To-Be-Done (JTBD) framework**, companies can design segmentation strategies that align with their customers' real needs. This article explores a comprehensive segmentation project modeled after **PhoneBurner**, a SaaS platform, and details how a **Revenue Operations (RevOps) team** can develop dashboards that provide actionable insights for executive leadership.

## CONTENTS

|                                                  |   |
|--------------------------------------------------|---|
| Introduction.....                                | 1 |
| Applying JTBD to RevOps Segmentation .....       | 1 |
| Building Executive-Level Dashboards .....        | 2 |
| Change Management Playbook .....                 | 2 |
| Technology Stack & Cost Estimates .....          | 3 |
| Business Impact & Organizational Alignment ..... | 3 |
| STAR Schema Data Modeling .....                  | 4 |
| Conclusion .....                                 | 4 |

## APPLYING JTBD TO REVOPS SEGMENTATION

Rather than grouping customers by industry or company size alone, the JTBD framework focuses on why customers use the product. This approach identifies customer segments based on how they derive value, leading to improved targeting, retention, and expansion efforts.

Key segmentation criteria:

- **Product Usage Patterns** – How often and in what way customers engage with the software.
- **Retention Indicators** – Tenure, churn risk, and engagement.
- **Tech Stack** – Integrations and tools customers use alongside the product.
- **Business Outcomes** – The goals they seek to achieve using the platform.

The **segmentation process** involves:

1. Gathering **20K rows of user data** from CRM and product analytics.



2. Using AI-driven analysis to create **segmentation clusters** based on behaviors.
3. Enriching profiles with **external data** (LinkedIn roles, additional stack tools).
4. Defining **Ideal Customer Profiles (ICPs)** for targeted GTM strategies.

## BUILDING EXECUTIVE-LEVEL DASHBOARDS

Each executive function requires a **dedicated dashboard** to translate segmentation insights into strategy.

### 1. CEO Dashboard: Company Health & Growth

- **OKRs & Metrics:** Revenue growth rate, customer churn, lifetime value (LTV), acquisition costs.
- **Visuals:** Cohort retention curves, revenue heatmaps, expansion trends.
- **Impact:** Enables the CEO to make data-driven decisions on resource allocation and GTM strategy.

### 2. CRO Dashboard: Revenue & Expansion Strategy

- **OKRs & Metrics:** Net revenue retention (NRR), upsell/cross-sell opportunities, churn risk scores.
- **Visuals:** Sales pipeline breakdown, segmentation heatmap, churn analysis.
- **Impact:** Helps the CRO focus on high-value customer segments for expansion.

### 3. CMO Dashboard: ICP & Marketing Performance

- **OKRs & Metrics:** Customer acquisition cost (CAC), campaign ROI, lead-to-customer conversion rates.
- **Visuals:** Lead scoring models, segmented campaign performance, website heatmaps.
- **Impact:** Refines marketing strategies by aligning campaigns with top-performing segments.

### 4. CPO Dashboard: Product Adoption & Engagement

- **OKRs & Metrics:** Feature adoption rates, time-to-value (TTV), Net Promoter Score (NPS).
- **Visuals:** Feature heatmaps, engagement funnels, JTBD segmentation overlays.
- **Impact:** Enables the product team to prioritize features and improve adoption.

### 5. CCO Dashboard: Customer Success & Retention

- **OKRs & Metrics:** Support ticket volume, time-to-resolution, customer health scores.
- **Visuals:** Customer lifecycle maps, churn prediction models, support trends.
- **Impact:** Allows proactive intervention to reduce churn and improve customer satisfaction.

## CHANGE MANAGEMENT PLAYBOOK

For successful adoption of these dashboards, **each functional team** must integrate segmentation insights into daily operations.

### 1. CEO & Board Alignment

- Monthly **business reviews** with segmentation-driven performance insights.



- Incorporating **segmentation data into investor reporting**.

## 2. CRO & Sales Adoption

- Training sales teams on **using segmentation insights for better outreach**.
- Aligning **commission structures with high-retention customer segments**.

## 3. CMO & Marketing Implementation

- Creating personalized campaigns based on **ICP-defined segments**.
- Leveraging **real-time engagement metrics** for budget allocation.

## 4. CPO & Product Strategy

- Prioritizing roadmap items based on **customer segment needs**.
- Using **heatmaps and JTBD insights** to inform UX decisions.

## 5. CCO & Customer Success

- Developing **playbooks for proactive engagement** with at-risk customers.
- Implementing **health scoring models for customer prioritization**.

## TECHNOLOGY STACK & COST ESTIMATES

Optimizing for **best-in-class** solutions across core functions:

| Category                      | Top Vendors                                   | Estimated Costs     |
|-------------------------------|-----------------------------------------------|---------------------|
| <b>CRM</b>                    | Salesforce, HubSpot                           | \$150/user/month    |
| <b>AI &amp; Automation</b>    | OpenAI, Make, n8n                             | \$0.03 per API call |
| <b>BI &amp; Dashboards</b>    | Looker, Tableau, Power BI                     | \$20–70/user/month  |
| <b>Storage &amp; Database</b> | AWS, Azure, Google Cloud                      | \$0.023/GB          |
| <b>Marketing Automation</b>   | Adobe, HubSpot, Marketo                       | \$800–2000/month    |
| <b>Sales Intelligence</b>     | ZoomInfo, Apollo.io, LinkedIn Sales Navigator | \$99–800/month      |
| <b>Collaboration</b>          | Slack, Notion, Atlassian                      | \$8–15/user/month   |

## BUSINESS IMPACT & ORGANIZATIONAL ALIGNMENT

Implementing segmentation-focused dashboards delivers:

- **Data-driven executive decision-making**.



- **Stronger GTM alignment across functions.**
- **Increased revenue retention and expansion opportunities.**
- **Better customer experience via proactive interventions.**

## STAR SCHEMA DATA MODELING

A **centralized data warehouse** structure to support segmentation dashboards.

| Fact Table                  | Dimension Tables                      |
|-----------------------------|---------------------------------------|
| <b>Customer Activity</b>    | Users, Companies, Subscriptions       |
| <b>Revenue Metrics</b>      | Sales Transactions, Renewals, Upsells |
| <b>Product Engagement</b>   | Features Used, Session Data, NPS      |
| <b>Support Interactions</b> | Tickets, Time-to-Resolution, CSAT     |

## CONCLUSION

By leveraging **JTBD segmentation and RevOps dashboards**, high-growth SaaS companies can systematically improve retention and revenue. A well-executed segmentation strategy not only benefits executives but also enhances customer experiences and internal efficiency. The **RevOps function plays a crucial role** in operationalizing segmentation insights, making them actionable across GTM teams.

**Next Steps:** If your company struggles with retention, it's time to adopt segmentation insights and build dashboards that drive real impact.

