

Customer segmentation and personalization

This workflow automatically segments customers based on purchase behavior and generates personalized marketing campaigns and product recommendations to increase customer lifetime value and conversion rates.

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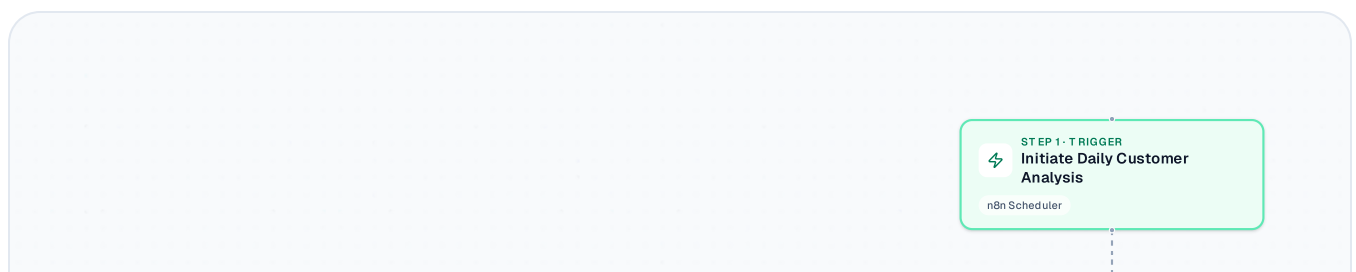


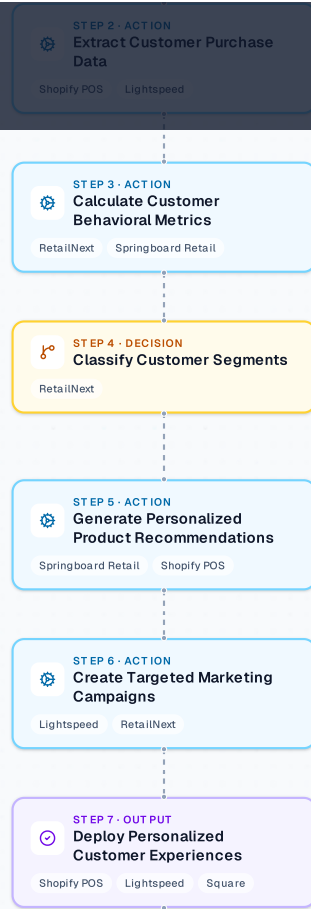
WORKFLOW TRIGGER

Daily batch process runs at 6 AM to analyze updated customer transaction data

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Initiate Daily Customer Analysis

Scheduled trigger runs daily to begin customer segmentation process using the latest transaction data. This ensures segments remain current with recent purchasing behaviors.

2

 ACTION

Extract Customer Purchase Data

Retrieves all customer transaction history, product purchases, and engagement metrics from the POS system. Data includes purchase frequency, average order value, product categories, and recency of purchases.

Shopify POS

Lightspeed

3

 ACTION

Calculate Customer Behavioral Metrics

Processes raw transaction data to compute RFM scores (Recency, Frequency, Monetary), customer lifetime value, and product affinity scores. These metrics form the foundation for segmentation algorithms.

RetailNext

Springboard Retail

4

 DECISION

Classify Customer Segments

Uses calculated metrics to automatically assign customers to predefined segments like VIP customers, at-risk customers, frequent buyers, or new customers. Decision branches determine different treatment paths for each segment.

RetailNext

5

 ACTION

AI Business OS

Generate Personalized Product Recommendations

Creates tailored product suggestions for each customer segment based on purchase history, seasonal trends, and inventory availability. Recommendations are optimized for cross-selling and upselling opportunities.

Springboard Retail

Shopify POS

6

⚙️ ACTION

Create Targeted Marketing Campaigns

Develops segment-specific promotional campaigns, discount offers, and email marketing content. Campaign messaging and offers are customized based on each segment's behavioral patterns and preferences.

Lightspeed

RetailNext

7

🎯 OUT PUT

Deploy Personalized Customer Experiences

Activates personalized recommendations in POS systems and triggers automated marketing campaigns. Updates customer profiles with new segment classifications and recommended actions for sales staff.

Shopify POS

Lightspeed

Square



Outputs

AI Business OS

- Customer segment classifications and profiles
- Personalized product recommendation lists
- Targeted marketing campaigns and promotional offers



Key Metrics

- Customer lifetime value increase
- Conversion rate by segment
- Average order value improvement



Tools & Integrations

- n8n Scheduler
- Shopify POS
- Lightspeed
- RetailNext
- Springboard Retail
- Square

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