

CUSTOMER 360 INTELLIGENCE WITH TREDENCE

Transforming Documents into
Growth Insights for a Leading
American SaaS Provider



CLIENT OVERVIEW

A global leader in e-signature and contract lifecycle management (CLM), our client serves over 1.5 million customers and impacts a billion people across 180+ countries.

By leveraging intelligent agreement management (IAM), they unlock critical business data trapped within documents, enabling seamless agreement creation, management, and execution. Their solutions empower businesses to accelerate workflows, reduce costs, and enhance efficiency.

BUSINESS OBJECTIVES: PIVOTING TO PRODUCT-LED GROWTH (PLG)

FUNCTION	SALES-LED GROWTH OBJECTIVES	PRODUCT-LED GROWTH OBJECTIVES	REPRESENTATIVE TACTICAL ENHANCEMENTS
Sales	Lead qualification via legacy research and intelligence	Customer qualification based on product experience	Shift focus to product-qualified leads for outbound efforts
Marketing	Generate targetable sales-qualified leads; drive renewals	Encourage product trials; promote feature adoption	Easy trial sign-ups through programmatic targeting
Partners	Drive referrals for sales conversion	Embed trial experience into partner ecosystem	Integrate trial sign-ups into partner cloud platforms
Customer Success	Provide reactive support for onboarding and adoption	Enable self-serve, proactive digital resolutions	In-app tools for expansion and seat purchases

TRENDENCE SOLUTION: YOUR END-TO-END PARTNER IN DATA, AI & MARTECH

For over four years, Trendence has been the end-to-end Data, AI, and MarTech partner to our client, driving measurable outcomes.

✓ MARKETING

Advanced measurement, digital attribution, and budget optimization.

✓ MARTECH MODERNIZATION

Comprehensive strategy, architecture, and CDP implementation.

✓ CONTACT DATA MODERNIZATION

Health scorecards, 3P data enrichment, and insights augmentation.

✓ CUSTOMER 360°

Unified customer data via a four-level hierarchical data model on Snowflake.

✓ PRODUCT-LED GROWTH

PQL activation, digital trial analysis, and conversion optimization.

✓ PRODUCT ANALYTICS

A/B testing, in-app experience design, and journey analytics.

✓ SALES ANALYTICS

Markdown optimization, cost negotiation, and demand transference.

✓ SALES OPS

AI-powered scoring and task optimization.



A JOURNEY OF TRANSFORMATION: TREDENCE WITH THE CLIENT

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A Holistic Partnership Driving Enterprise-Wide Transformation

✓ PERFORMANCE MARKETING

Developed closed-loop marketing measurement systems to optimize budgets and campaigns.

✓ CONTACT DATA HARMONIZATION

Introduced a gold-standard MDM roadmap, ensuring consistency across touchpoints.

✓ PROSPECTING 2.0

Delivered success metric definitions and governance frameworks across teams.

✓ PRODUCT ANALYTICS

Guided post-GA4 migration, enhancing experimentation and product optimization capabilities.

✓ SALES EXCELLENCE

Designed the President's Club Dashboard, spotlighting top performers and aiding strategic decisions.

✓ OPERATIONAL EXCELLENCE

Migrated systems to DBT for streamlined data workflows, enabling faster insights.

✓ THOUGHT LEADERSHIP

Provided actionable recommendations for MDM and CDP adoption, fostering innovation.

Enriching Customer Intelligence: Data-driven GTM Strategies

KEY PILLARS →

1

Elevate product **experience** to fuel customer satisfaction.

2

Build enriched, **actionable** customer intelligence.

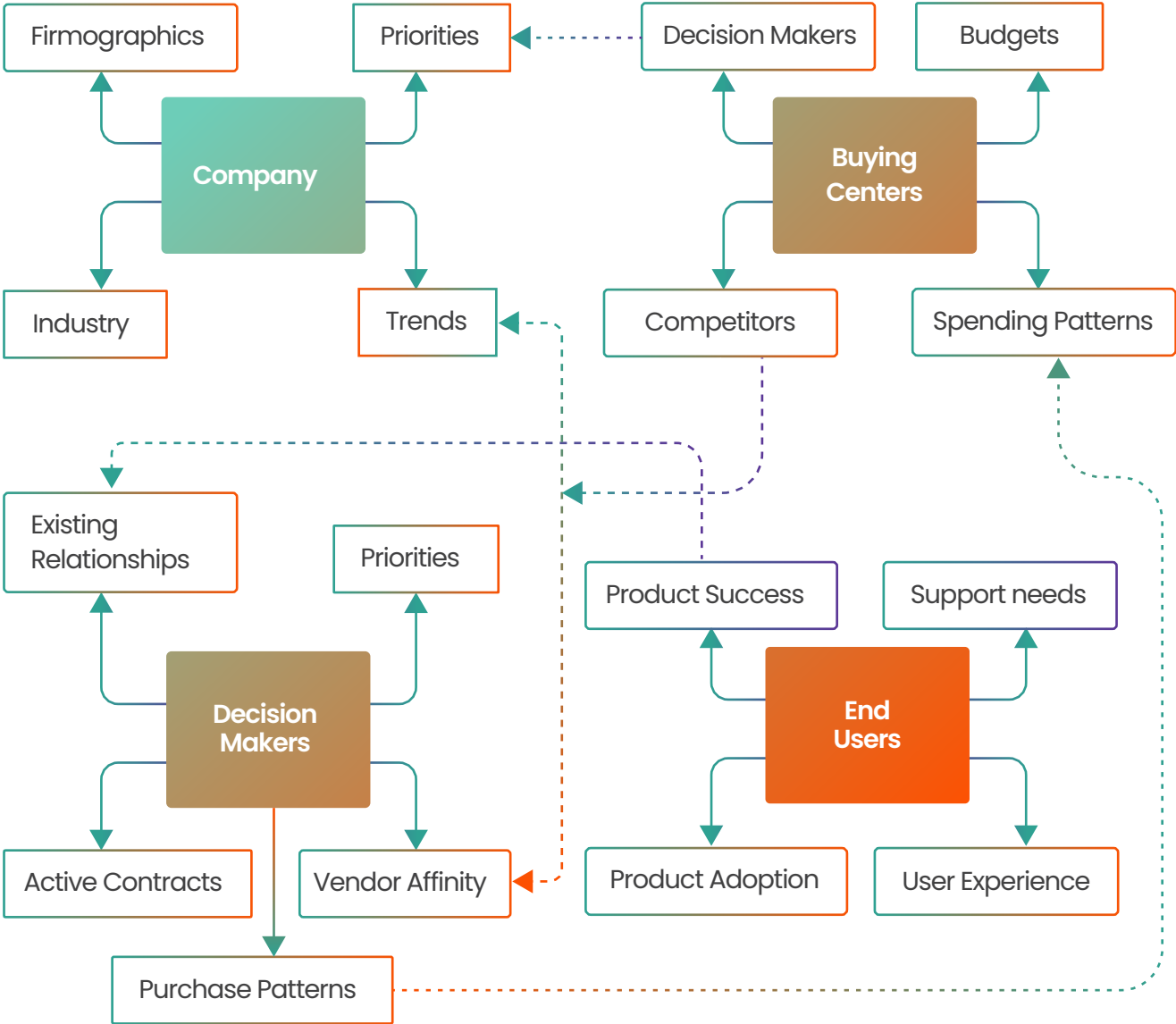
3

Integrate sales, **marketing**, and partner touchpoints for cohesive strategies.

KEY ACTIONS UNDER GTM STRATEGIES

- ✔ **Enriched customer intelligence** with Account - Contact 360 View comprising of
 - ✔ Collected
 - ✔ Observed
 - ✔ Inferred & Predictive Attributes
- ✔ **Optimized individual touchpoints**
- ✔ **Optimized high value outcomes** to maximize headroom opportunity
- ✔ **Optimized sequence and channels** of touchpoints

MULTI-HIERARCHICAL CUSTOMER DATA MODEL



- ✔ Organizes data by accounts, decision-makers, and end users.
- ✔ Establishes governance for incoming data sources.
- ✔ Converts customer events into signals for opportunity identification.

ENRICHED 360 FEATURE STORE: POWERED BY ADVANCED DATA INTEGRATION

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With Tredence's Enriched 360 Feature Store, gain deep, actionable insights across your customer base, powered by:

**CUSTOMER JOURNEY
MAPPING**

**AI/ML MODELS FOR
NUANCED SIGNALS**

**TELEMETRY & 3P DATA
INTEGRATION**

WHAT THEY CAN DO



PERSONA INSIGHTS

Unveil company size, buying groups, financial health, technographics (budget, competitor presence), and key stakeholders.



PRODUCT USAGE SIGNALS

Track trial dwell time, feature usage, acquisition channels, frequency, and document competitions.



PRODUCT LIFECYCLE STAGES

Monitor stages from new trials to loyal super users, including at-risk users.



CUSTOMER BEHAVIOR

Analyze CRM, digital, and marketing data like contract info, subscription rates, email engagement, etc.



CUSTOMER PREFERENCES

Understand device preferences, pricing plan choices, feature scores, and support channel usage.



BEHAVIORAL PREDICTIONS

Forecast feature adoption, channel responses, service issues, and seat utilization trends for the next 30/60/90 days.

BUSINESS IMPACT

Tredence's end - to-end Data, AI, and MarTech transformation delivered tangible business impact for the SaaS leader. The numbers speak for themselves:

+3 PTS

improvement in trial-to-repeat conversion rates.

+25 BPS

boost in marketing ROI.

109%

goal attainment for self-serve product trials.

\$20M+

in annual savings through integrated planning.

\$15M+

in annualized MarTech cost savings.

CONCLUSION

By delivering a cohesive data and AI strategy, Tredence empowered the client to transition from sales-led to product-led growth seamlessly. This partnership continues to unlock opportunities, enhance customer intelligence, and drive sustainable growth across their business.