

# 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. Their solutions empower businesses to accelerate workflows, reduce costs, and enhance efficiency.

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

## ORCHESTRATING GROWTH: A UNIFIED VISION FOR SALES AND PRODUCT EXCELLENCE

Our client's objective is to leverage Data, AI, and MarTech to seamlessly integrate sales and product-led strategies, driving qualified leads, enhancing customer experiences, and fostering measurable outcomes.

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

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

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## ✓ 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.

## 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.

**\$15M+**

in annualized MarTech cost savings.

**\$20M+**

in annual savings through integrated planning.

## 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

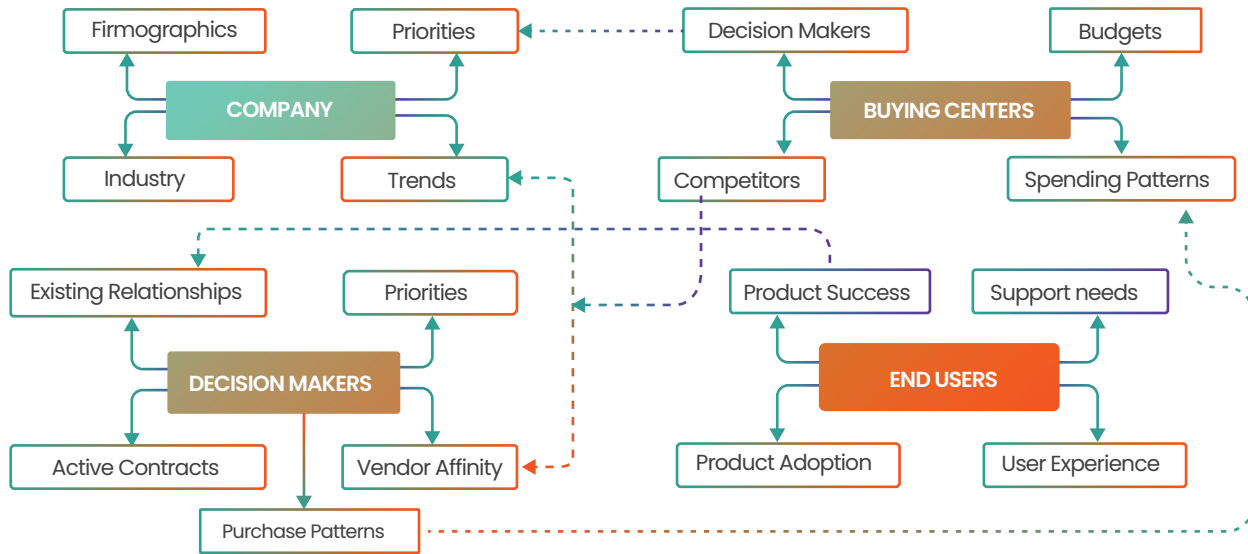


Optimized sequence and channels of touchpoints



Optimized high value outcomes to maximize headroom opportunity

## 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

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.

**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.