

# How CDP Real-time Analytics and Single Customer Views Feed Trifecta's Growth



The direct-to-consumer meals provider uses Treasure Data to orchestrate marketing & create loyalty-building customer experiences

## 14

previously siloed systems connected to build a unified customer data foundation

## 50,000

duplicate profiles eliminated through profile unification

## 500+

blog posts analyzed using smart attribution algorithms for impact on purchase path

Greg Connolly, Trifecta's CEO, had a vision of what Trifecta could someday be: the Peloton of the prepared nutritious meal business, using data-driven personalization on a mass scale to "hack America into healthy eating."

But although the company was growing rapidly, it was still relatively small compared to multinational food-and-beverage companies such as AB InBev that use sophisticated Treasure Data Enterprise Customer Data Platform (CDP) technology and attribution models to develop direct-to-consumer (DTC) capabilities and understand customer behavior.

Did they really need all that? Absolutely, answered Connolly. It would turn out to be a crucial, growth-driving decision for the young CPG company.

*"Having Treasure Data CDP and access to real-time data is incredibly important to us—as it is to all DTC brands. We can now connect with the end consumer on a much deeper level than retailers."*



**Greg Connolly**  
CEO, Trifecta Nutrition



## CHALLENGE

- Customer data in multiple disconnected silos
- Customer analytics conclusions inconsistent across systems
- Lack of data-driven view into customer personas
- Attribution model missing key touch points in conversion path
- Missing customer data foundation to support high growth



## SOLUTION

- Create highly personalized customer journeys at scale
- Stitch together all data for a single customer view (SCV)
- Create propensity models based on multi-touch attribution (MTA)
- Customer analytics for a single source of truth
- Provide advisors with actionable data for customer consultations
- Up-to-the minute reporting to support growth & investment



## WHY TREASURE DATA?

- Real-time data & predictive capabilities for personalized journeys
- Enterprise scalability to meet initial & future data needs
- Sophisticated, preconfigured & flexible attribution models
- Easily accessible analytics based on unified customer data sets
- Customer data foundation to support marketing, sales, and service



## TOP USE CASES

- Highly tailored CX, meal plans & workout recommendations
- Real-time detailed single customer views (SCVs)
- Predictive analytics & next best action
- Treasure Insights to understand customer behavior
- Data integration of many different systems



## The Challenge Needed: A Scalable Solution and a Real-time Single View of the Truth

Trifecta Nutrition is a consumer packaged goods (CPG) company that focuses on subscription-based meal delivery to health-conscious customers throughout the United States. It's a growing market. The U.S. already has the largest health-and-wellness market in the world, at \$52.5 billion in value.

Technology and data are so central to the 6-year-old company's business that CEO Greg Connolly says that at its heart, the Sacramento, Calif.-based company is not just DTC meal delivery service—it's an app company, too. Because its app and website collect so much data about customers' moods, preferences, and habits, the company is awash in customer data that describes everything from daily exercise logs to full eating, mood, and browsing histories.

But the growing company faced several serious challenges in its marketing. Data feeds came from many different sources, each with a different function and role in engaging customers and running marketing operations. Each had its own interface and most generated analytics, which were not always exactly what marketers needed, and all of which required accessing a different system to learn a few important metrics.

### **Data Silos, Lack of Real-time Data Slowed Down a Fast-paced Marketing Program**

The process of gathering marketing data from these martech silos was not just time-consuming, but often resulted in confusion and errors when analytics generated from one system were wildly at odds with those created by another, usually because of differences in data collection and the nuances of exactly what each system was counting.

*"We have 14 different systems feeding into Treasure Data, so having a single unified customer view helps us market more intelligently and be much more useful to our customers as well."*

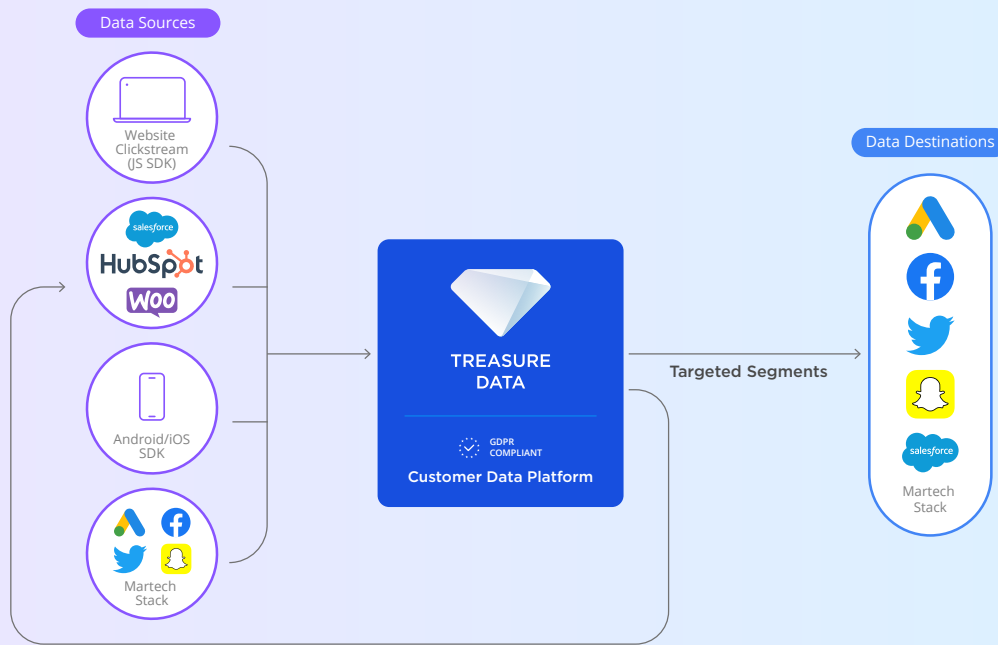
**Greg Connolly**  
Trifecta Nutrition

*"A lot of times in my career, I've thought that a solution was good, but then we'd run into limitations we hadn't anticipated. With Treasure Data, it was the exact opposite: The capabilities we are able to use are so much more than we thought at first."*



**Tessa Bicard**  
VP of Marketing, Trifecta Nutrition

# Trifacta Architecture Diagram



"Before we got Treasure Data, we'd often be arguing about two different numbers that would be very different or inconsistent," says Tessa Bicard, VP of marketing for Trifacta.

"I wanted one central dashboard where we could see our data and analytics, and for all of us to look at a time period and a metric and all see the same numbers. I wanted a single accurate version of the truth we could all look at," says Bicard.

## The Need to Know Each Customer Better

The company's leadership also wanted a more detailed, nuanced understanding of who its customers were and which website content and customer touches really made a difference for each type of customer.

"Two marketers at Trifacta should never have to have an argument about who our customers are," says Kyle Pate, senior product analyst at Trifacta.

And yet, that was a regular occurrence.

"We have a lot of tools in our martech stack. But what we didn't know is whether the Joe Smith in Hubspot is the same as this Joe Smith data over here in our CRM," says Bicard.

## Why Treasure Data?

Several factors weighed heavily in Trifacta's choice of Treasure Data, including the need for frequently updated, real-time data, better attribution models and a singular view of each customer.

But scalability was also a critical factor in the decision. The company was at the \$100 million mark in revenues, and

Connolly points out that the company usually grows at 100 to 200% YOY. This meant that Trifacta needed a solution that would scale to fit its needs at any company size. So when it came to selecting the right martech for Trifacta, Connolly insisted on thinking big from the very beginning, and Treasure Data was not only enterprise-focused but extremely scalable.

"Greg, our CEO, was really adamant that we needed a solution that would work when our company was young, but that could scale up massively as needed," says Kyle Pate, senior product analyst at Trifacta. "I wasn't sure if Treasure Data was too large-scale or too much power for us, but it turned out to be just right at every step of our growth," says Pate.

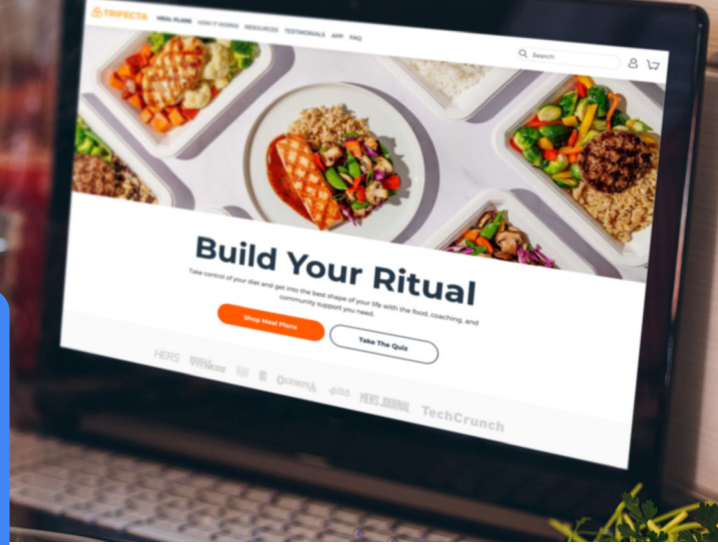
Treasure Data's more sophisticated, flexible attribution models were also a major factor. Other solutions didn't offer flexibility in choice of attribution models, nor were they transparent in showing what factors were important in determining the effectiveness of different touches.

"We didn't just want to know the last touch before a purchase," says Pate. "We wanted to know which were important anywhere in the process."

Pate, Connolly, and Bicard all agree that the level of detail that Treasure Data CDP collects—as well as its ability to easily handle data from virtually any source—were also key factors.

Being able to quickly examine a particular time period was a key feature for Bicard. Surprisingly, this was a distinguishing feature of Treasure Data CDP. "I would have thought that any solution should offer that, but the others we looked at didn't," she says.





## The Solution

# How Treasure Data Bulks Up Trifecta's Marketing

Data unification, attribution modeling & real-time data for up-to-date dashboards are just the start

Implementing Trifecta's Treasure Data CDP instance started with unification of data from many diverse sources—which went more smoothly than anyone on the Trifecta team had imagined.

"Treasure Data is more responsive than [any other martech platforms] I've experienced before in my marketing career," says Bicard. "We had a dedicated Slack channel, which made for very good responsiveness on the Treasure Data side."

"It really feels like they're members of the Trifecta team. We can send over quick little questions and snippets rather than having to file a ticket or go through an email channel that then might need to get escalated to someone else. That's been a very good customer experience for us," she says.

Data unification was swift, and more than 50,000 duplicate profiles were detected and consolidated with complete unified profiles. Soon Pate was able to use the resulting single customer views (SCVs) to build profiles of individuals who represented different types of customers. One finding was particularly surprising: The company's most common type of customer was not necessarily the hard-training young twenty-something that might be expected to predominate in subscriber lists.

"We discovered that our customer base is a little different from what we expected," says Bicard.

"Rather than being only people who are really into training and fitness as a lifestyle, we also have a lot of customers who are more affluent, a little older, and fit more closely to the demographic of Weight Watchers," she says. In other words, Trifecta's average customer wasn't someone who lived to train, but someone who just wanted an easy way to improve their health, nutrition, and diet.

Treasure Data also worked with Trifecta to feed current information into dashboards that were updated hourly or even

more frequently with the marketing metrics that matter most to Trifecta. Eventually, more than 77% of the company's real-time metrics were coming from Treasure Data CDP, and Trifecta was able to replace Google Analytics.

"Google Analytics is a good, free tool. But over time, we noticed greater time lags in updating the metrics in our dashboards, and discrepancies with other metrics," says Pate. "Treasure Data CDP and Treasure Insights updates us more frequently and accurately."

As solution implementation proceeded, the Trifecta team began to realize that these initial capabilities were just the start of getting its data—and its marketing muscle—into prime shape.

"A lot of times in my career, I've thought that a solution was good, but then we'd run into limitations we hadn't anticipated," says Bicard. "With Treasure Data, it was the exact opposite: The capabilities we are able to use are so much more than we thought at first."

*"Treasure Data CDP is now our playground to understand our customers and do things like better targeting and segmentation, and predictive analytics. It's also our single source of truth for the whole company, which is just what we needed."*

**Tessa Bicard**  
Trifecta Nutrition



## The Results

# CDP Helps Trifecta Marketing Program Exert New Muscle

Single Customer Views, Real-time Dashboards and Multi-touch Attribution Help Trifecta Bulk Up Results

The impact of Trifecta's Treasure Data CDP implementation on the company's ability to use data has been both broad and deep, as CEO Connolly explains.

"Treasure Data CDP and access to real-time data is incredibly important to us—as it is to all DTC brands," he says. "We can now connect with the end consumer on a much deeper level than retailers. We have 14 different systems feeding into Treasure Data, so having a single unified customer view helps us market more intelligently and be much more useful to our customers."

The detail of each profile was a big surprise.

"I was able to put together so much from just a few data sources and a Facebook search for a picture," says Pate. "It was amazing how much we can understand and use from these profiles of our customers," he says.

### Real-time Data Makes Marketing More Agile

Replacing Google Analytics as the main real-time source of data—and using Treasure Data to feed the company's dashboards—has also made the company's marketing as agile as some of its customers.

"We can make decisions day-to-day or hour-by-hour now," says Bicard. "And we can often immediately detect if a part of our website is not working, investigate it, and fix it—rather than finding out at the end of the month or the end of the quarter that something went wrong and we lost that revenue."

### Using Customer Data as a Competitive Advantage

The new profiles didn't just answer many questions and settle many internal debates about which types of customers were responsible for high customer lifetime values. They also powered many sales and support conversations that ultimately led to better customer journeys and higher customer lifetime values.

Representatives dealing with customers can see which blog posts each customer read, and know what they're particularly interested in. If, for example, the customer has read blogs indicating an interest in a Keto diet (high protein, low-carbohydrate), the rep can talk about issues surrounding that diet, and can suggest fixes for any problems the customer is encountering. That empowers the rep to help them better and achieve their goals faster, and get to the answers to their questions about the product faster and more efficiently, Bicard explains.

Using Treasure Insights and unified data from Treasure Data CDP, Trifecta can now automatically flag accounts where customers are likely to churn—perhaps because they're flagging in their resolve to eat better and get fitter—and arrange for interventions that could range from automated emails or texts to a morale-boosting (and probably revenue-enhancing) call from a Trifecta rep.

The concept also works in reverse: Customers or prospects with a high propensity to buy can be offered additional products and services, boosting customer lifetime value (CLTV).





### **Customer Data and Single Customer Views Tell a Powerful, Investment-grade Tale**

Having detailed SCVs has also been a big help in showing investors the power of Trifacta's approach. Originally created to help inform marketing and sales strategy and build results customer by customer, the profiles have helped Connolly and Bicard to tell a compelling, data-driven story about the revenue-generating power of both its current customers and its ability to sustain and accelerate growth over the long haul.

The "wow factor" of the profiles was a significant plus in successful discussions leading to a recent round of investor funding, Connolly and Bicard agree. It reinforced a message that the investment community is also receiving on many other channels: the power of customer data, AI, and machine learning to perform as a powerful, revenue-generating trifecta.

"Having lots of high-quality data is incredibly valuable to direct-to-consumer (DTC) brands—and there's a rising tide of those, right now—from Warby Parker to Trifacta. We're all using extremely fine-grained data now as a central piece of our business models," says Connolly.

### **Multi-touch Attribution Helps Trifacta Focus Resources on the Touches That Matter**

Trifacta also exploited Treasure Data CDP's attribution modeling capabilities to understand which touches seemed to matter most in retaining customers. The flexibility to choose different attribution models—other than the easy-but-sometimes-misleading "last-touch" model—led to the revelation that customers were more likely to stick with their workouts and their meal plans if they'd recently read a blog.

With this realization, the company began a program to evaluate more than 500 different blogs in its content

repository to see which ones turned up most frequently in customers' paths to purchase or continued subscriptions. The themes or authors who appeared most frequently in these paths were then used to generate similar new content to drive future sales.

### **A Shift in Corporate Culture Pumps Up Marketing Strategy**

The fast, easy availability of customer data has also changed the corporate culture toward experimentation and the "art of the possible."

As Tessa Bicard summarizes this shift: "Treasure Data CDP is now our playground to understand our customers and do things like better targeting and segmentation, and predictive analytics. It's also our single source of truth for the whole company, which is just what we needed."

Treasure Data is an AWS Advanced Technology Partner Independent Software Vendor (ISV), holds the AWS Data and Analytics ISV Competency, and is an AWS Marketplace Seller. The Treasure Data CDP is built on and integrates with a number of AWS solutions, including Amazon Advertising, Amazon Kinesis data streaming, Amazon Redshift data warehouse, and Amazon Simple Storage Service (Amazon S3).

## **TREASURE DATA**

Treasure Data, backed by AWS, empowers enterprises to deliver relevant, real-time customer experiences.

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