

Unifying Data to Drive Smarter Growth

Uncovering 27K cross-sell opportunities from one proof of concept (POC)



TECHNOLOGY



TREASURE DATA

Executive Summary

A leading, publicly traded cloud-based financial operations platform needed to unify fragmented customer data across business units—including post-M&A entities—and reduce reliance on engineering for segmentation and activation. After a successful proof of concept (POC), the company implemented Treasure Data CDP to streamline data ingestion, unify millions of customer identities, and enable real-time activation across key platforms, all within a matter of weeks. Treasure Data CDP now powers scalable, data-driven growth and reveals valuable cross-sell and upsell opportunities.

Key business impact:

61M records ingested in under 10 minutes

6.8M customer profiles created

27,800 overlapping customers identified for cross-sell

Treasure Data's POC is a rapid, collaborative journey showcasing our CDP's transformative potential in just 2 weeks. We work with your technical and marketing teams to identify high-impact use cases tailored to your needs. Through hands-on access, workshops, and support, we demonstrate the platform's capabilities, ease of use, and long-term value.

This POC is just the beginning, offering a glimpse of the full potential Treasure Data can bring to your business operations and customer engagement strategies.

CHALLENGES

- Disparate customer data across post-M&A business units
- Inconsistent identifiers across platforms
- Limited visibility into cross-product usage
- Manual, engineering-heavy segmentation workflows
- Lack of real-time data activation

USE CASES

- Customer profile unification
- Cross-sell and upsell identification
- Real-time data activation across platforms
- Self-serve segmentation for marketing teams
- Post-M&A data integration

BUSINESS IMPACT

- 61M records unified in under 10 minutes
- 6.8M unified profiles created
- 27,800 shared customers identified for cross-sell
- Empowered marketing teams to create and launch segments
- Faster, data-driven campaign execution

Why Treasure Data?

The company chose Treasure Data CDP for its flexible architecture, enterprise-grade identity resolution, and proven ability to integrate with complex data environments—including post-M&A ecosystems. Competing platforms often required rigid data structures or lacked the scale to ingest high volumes efficiently.

Treasure Data stood out with its ability to accommodate both strict and dynamic unification rules, handle multiple data models, and support hybrid identity strategies. The platform's interoperability also allowed seamless integration with existing tools like Salesforce, Segment, Redshift, and Pendo—without disrupting existing workflows. Treasure Data's adaptability made it the ideal choice for a fast-moving, high-growth organization managing diverse data sources across multiple business units.

Accelerated campaign agility

Treasure Data CDP gave marketing and product teams direct access to unified customer profiles, allowing them to build audiences and activate campaigns without engineering support. Real-time data syncs with tools like Salesforce, Redshift, and Segment eliminated delays and manual workflows. Teams now operate with greater speed, precision, and independence—reducing time-to-market and freeing technical resources for higher-priority initiatives.

Revenue growth through shared insight

By unifying 6.8 million profiles and surfacing 27,800 shared customers across business units, the company revealed powerful cross-sell and upsell opportunities that were previously hidden. This new visibility is driving smarter account prioritization and boosting customer lifetime value through more relevant engagement across the ecosystem.

Future expansion

Looking ahead, the company plans to extend its use of Treasure Data CDP across additional business units, sales teams, and in-app experiences. Advanced segmentation and automation will support proactive customer engagement and drive scalable, data-driven growth.

THE RESULTS

61M

records ingested in under 10 minutes

6.8M

unified unified profiles

27,800

shared customers identified for cross-sell



TREASURE
DATA

Treasure Data empowers the world's largest and most innovative companies to drive connected customer experiences that increase revenue and reduce costs. Built on a big data foundation of trust and scale, Treasure Data is a customer data platform (CDP) pioneer and continues to reinvent the CDP by putting AI and real-time experiences at the center of the customer journey. Our CDP gives customer-centric teams across Fortune 500 and Global 2000 companies – marketing, sales, service, and more – the power to turn customer data into their greatest treasure. Visit www.treasuredata.com to learn more. Join Treasure Data's global CDP community at CDP World, its annual summit for marketing and data leaders.