How Clearbit Data Team use DBT & Census to empower their business teams
Clearbit is a B2B SaaS company that provides tools to improve sales & marketing efforts by aggregating public data about customers.

**CHALLENGES**

1. No single source of truth. Customer & product data were silo’ed in different tools.

2. No unified customer view which leads to duplicate users across their 6+ products.

3. Impossible to see the end to end customer journey and do revenue and leads attribution.

4. Relying on Engineering & IT teams to add data to the business tools via customer integration was too slow and brittle.

5. Existing integration tools like Tray didn’t work for the modern stack.

**RESULTS**

1. 360° Customer view in Salesforce to make the Account Executives and Account Managers more productive.

2. Hyper personalized email campaigns base on product usage, acquisition channels, customer journey stage & customer success owner.

3. More teams at Clearbit are using data.

4. Commercial ideas/campaigns are not limited by data anymore.

5. The Data team is a key stakeholder in the company as it is connected to more tools and people.

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**The Tech Stack**

**SOLUTIONS:**
- 360° customer view
- Lead Attribution
- Personalized Emails
- Granular Segmentation

**INTEGRATIONS:**
- Redshift to Salesforce
- Redshift to Customer.io
Clearbit is a B2B SaaS company that provides tools to improve sales & marketing efforts by aggregating public data about customers. Clearbit started by offering a lead enrichment API (taking an email address and returning data like location, job title, etc.) and has since added a number of products to its suite like lead prospecting (returning contact information for leads based on a customer’s target parameters).

Because of Clearbit’s multiple products, fast growth, and large user base, they needed a way to automate a lot of their own sales & marketing and personalize every customer interaction. Specifically, they needed to have a clear picture of what all their users were doing across their suite of tools and they needed this available in Salesforce and Customer.io.

✔️ That’s when the Clearbit Data team turned to Census for help.

The Challenge - making senses of millions of users

The Clearbit team was generating lots of raw product usage events but they were spread across 9+ products. Each product in the suite has its own unique user identifier, which means that activity wasn’t de-duplicated. In addition, they couldn’t correlate these user activities with the data in their marketing & sales tools so it was impossible to act on the data. Here’s some specific examples of the challenges they faced:

- Sending personalized marketing email could lead to sending the same email 7 times to the same user or to emails with wrong/missing personalization data
- The Account Executives and Account Managers had no visibility into which product their leads were using and how they were using it
- It was impossible to analyze the end to end customer journey to identify where users might churn since a user has multiple internal identifiers
- Some entries in the CRM weren’t attached to existing product data and would lead to the sales team prospecting an existing customer.
The data team was spending a lot of time cleaning all this data to build accurate reports but none of this work was reflected back in their sales & marketing tools. This was when they turned to Census to share their single source of truth from their data warehouse to all their other tools and give their teams internal customer data they could rely on for their processes, workflows, and automations.

The Solution - Make analytics models available to other tools

The first step for the data team was to build out a sustainable architecture to ingest, store, model, and analyze all their events & data. Before they could set out to unify all their user schemas and data sources, they pulled in raw data using Segment & Stitch Data into their Redshift warehouse. On top of these raw tables, they built custom logic in SQL for de-duplicating users that appear in all their Segment sources & SaaS tools. These models also generate insights & customer attributes that are useful to the business. They leverage DBT to write these models and store them in a version-controlled repository.

With Census, in less than a week, they were able to sync this model to Salesforce & Customer.io without requiring any help from the engineering team.

Now that Census was up and running, every time the data team added new metrics or facets to their customer model, they could make it available to the sales & marketing teams directly using Census’ visual mapper.

Finally, the data team keeps control of the data flow from the ETL all the way to the tools which allow them to ensure data quality and accuracy.
“With Census, our sales & marketing always have current data in their tools and the data team can enable growth experiments”

- Julie Beynon
Head of Analytics

Multi-Touch Attribution Model in Salesforce

By syncing attribution data to a custom object via Census, the data team gave the sales reps the power to see all of the leads’ touch points and where in the journey they converted to a MQL or SQL.

With this information always up to date in Salesforce, the Ops team could also quickly run reports and see which offers, acquisition channels or campaigns were performing the best by tying it to actual deal closed and revenue.
Hyper Granular Segmentation and Personalized Email Campaigns

With data aggregated customer data and metrics syncing to Customer.io, the marketing team can leverage that data to build granular segmentation of Clearbit’s large userbase to send personalized email messages such as:

- Automatically educate & nurture self-serve users on features to create upsell opportunities.
- Send weekly API usage digest with detailed metrics on behalf of their account owner.
- Trigger email campaigns based on calculated metrics changes such as lead score or activities points.
Unified 360° Customer Profile in all the Tools

With Census syncing the unified customer profile that has 100+ fields to both Customer.io and Salesforce, all of the commercial teams at Clearbit spend less time troubleshooting bad data or dealing with duplicate users and more time operationalizing the data.

Finally, Sales Representatives don’t have to keep multiple tabs open such as internal apps, BI tools and payment providers to understand how their accounts are using Clearbit, where they came from and best to grow these accounts.

“Census means access to data is never a blocker for our revenue teams – if they want to run a growth experiment, the data is always available”

- Julie Beynon
Head of Analytics

Unified 360° Customer Profile in all the Tools

Thanks to Census and the work of Clearbit’s data team, the sales & marketing teams now have more data at their fingertips in the tools they use every day to understand their customers and create powerful, personalized campaigns.

The greater benefit has been how the culture of the company has changed to be more deeply data-driven and the virtuous loop that has emerged between the data team and the rest of the organization. Now that more teams rely on live data in a way that impacts revenue growth, there’s an implicit Quality Assurance (QA) feedback loop that helps the data team improve quality & accuracy.