Bottlenecks to Business Insights

Profiles of Customer Success With Heap

HEAP

Contents

Introduction

The e-commerce industry is just getting started. Although sales worldwide amounted to $2.3 trillion in 2017, this number is projected to reach $4.88 trillion by 2021.

How do you take advantage of this accelerated growth, especially in the world of industry giants like Amazon? Find data-driven strategies to optimize your business.

This concept isn't mind-blowing to most in e-commerce. The issue is that it can be challenging to actually convert data into insights — and then convert those insights into action. The organizations highlighted on these next pages have done just that — they've captured and analyzed user behavior data to gain critical insights into their business. And they didn't stop there: those insights led the way for micro-optimizations that resulted in major ROI. For example, NatureBox was able to boost conversion rates 5x in just six weeks and Sur La Table improved product views by 12%.

And because this data is already managed for them, these organizations' engineering teams save time (and sanity), so they can work on more interesting projects that help them take their business to the next level.

NATUREBOX

Finding the Why Behind Customer Behavior

NatureBox is an innovative food startup reinventing the way customers buy delicious, healthy food.

Founded in 2012, NatureBox offers over 100 unique snacks — all made with high-quality ingredients that are free from artificial colors, flavors, or sweeteners. In addition to being delivered straight to your home or office, NatureBox is now available at Target and on Delta flights.

With hundreds of products and many more customers, having flexible analytics infrastructure in place is key for the company's growth. After trying a number of options, the team started using Heap to get deeper insight into customer behavior and automate their behavioral event analytics pipeline.

1 Information modeling

With Heap, the team can flexibly define Virtual Events to structure data in both Heap and their data warehouse in a unified user-event model. With verified definitions around their autocaptured data, the team can be confident in their analysis.

2 Analysis with Heap SQL

Analysts are able to build their own models in a cohesive and flexible way across the company, as well as analyze data from multiple sources in one view, including Heap data via Heap SQL.

3 Analysis using Heap

After transitioning, Heap data became the team's primary source of truth for revenue-generating actions like conversions and core company KPIs. Business users (marketing, customer insights, and customer service) can retroactively define events and segments, build quick reports, and answer questions using the Heap dashboard, without engineering's support.

Analytics Infrastructure Powered by Heap SQL

Using Heap SQL, Looker, and Redshift, the team can combine diverse data sources and analyze them with confidence. To model this data, NatureBox pumps in multiple data sources — from Heap, ERP systems, order fulfillment data, Facebook ads, and more — and performs the necessary transforms, all in Redshift. Heap data provides important context around customer preferences and behaviors.

When building a new dashboard for the business, analysts can create new definitions in Heap and backfill all of this data historically into their data warehouse. If the data team receives a request for a new cut of data from business users, they simply either define a new property in Heap or create a new segment definition that are both automatically added to the data warehouse on the next sync.

Deep Investigative Analysis with Heap

Business users lean on Heap for "forensic research" when investigating trends or behavior — why did this happen, and how can I do more of it (if it's good) or stop it (if it's bad)? Heap helps them get contextual information on the fly, even if it's not already defined.

Contextualizing Anomalies

When someone notices unusual behavior in another tool, they'll dive into Heap to get more detail in just minutes.

"Maybe someone sees a spike in orders for a specific product and wants to know why," David said. "With the Event Visualizer, they get quick wins just from identifying that event and getting context that they need. That goes a long way — using Heap, they can answer their question and take action in less than 15-20 minutes," NatureBox VP of Engineering David Lee said.

"It used to take a week to answer a question. Using Heap, we can take action in less than 15-20 minutes."

DAVID LEE,
VP ENGINEERING AT NATUREBOX

Creating and Comparing Cohorts

NatureBox has a few key customer segments — some regular subscribers, some who use NatureBox to order office snacks, others who order after-school treats. What are they buying? What are their snacking preferences? How frequently do they order? Heap helps NatureBox build stronger recommendations and engage users meaningfully through individual and cohort analysis.

When they'd like to go one step deeper, Heap's Compare feature makes it easy for them to create arbitrary definitions for complex personas and understand how event behavior compares across multiple groups. For example, the team can compare a group of users who've purchased 5x in the past month and found NatureBox via paid search vs. inactive customers that discovered NatureBox organically.

Then, they can better answer questions like, "Which channels are most effective?" and "How are we retaining different user groups?"

Contextualizing A/B Test Data

At NatureBox, the team runs frequent A/B tests on how they order and present their many snack options. Because Heap ingests Optimizely data, the NatureBox team can use Heap to go beyond basic pass/fail test results and identify how their experiments impact larger objectives like feature engagement and retention. By having A/B test state on every event, the NatureBox team can re-model its Virtual Events to focus behavior on a particular variation instantly to answer the question at hand.

With this granular insight, the team has been able to optimize experiments with longer-term business goals in mind and were able to boost their conversion rate 5x in just six weeks.

5x

Improvement in
Conversion Rate
in 6 Weeks

12%
Increased Product Page Views

Sur la table

How to Make Black Friday a Booming Success

Since its inception over 40 years ago, Sur La Table has grown into one of the largest cookware retailers in the world by offering an unsurpassed selection of exclusive and premium-quality products and cooking classes.

Sur La Table's success has been driven by creating an amazing customer experience. As part of that mission, the company has built a culture of conversion rate optimization and rapid iteration on the e-commerce team to build the best customer experience possible. The digital marketing, e-commerce analytics, and merchandising teams now use Heap to make quick, real-time decisions.

Heap's flexible analysis modules and user-friendly virtualization layer have enabled a culture of exploratory, ad hoc analysis. For example, one of the early insights they found via Heap's dynamic

user cohorting was that the more products someone views, the more likely they are to convert and the higher the revenue per visitor. This led to a follow-up question: how should we optimize our email newsletter to drive more product page views, and consequently more revenue? Specifically, did it make more sense to drive people to category pages or directly to specific product pages via the email newsletter?

Another big win was around cross-product merchandising. The prior insight about product page views led the team to ask if it made sense to more prominently display similar or complementary products on product pages. When they tested this change, the results were huge: the improved cross merchandising on the product page for one of their most popular products resulted in a large lift in co-purchase and average order value.

6%

Improved overall
conversion rate

Merchandising Successes on Black Friday

The Sur La Table team used Heap for lots of real-time optimization leading up to and on Black Friday. They had a marketing campaign for a special insider program, and used Heap to see how many people were joining, and how the insider segment was behaving.

They found interesting insights about how the insider segment performed after acquisition vs. people who didn't join the insider program, and used this to make tweaks to further personalize the insider experience over time.

On the day of Black Friday itself, the merchandising team kept a close watch over which products were converting best. They had set up detailed purchase funnels for each of their highest-viewed products prior to Black Friday, and monitored these closely throughout the day. They were able to optimize in real time and push the highest and best-performing products to prominent places on the website.

Because Heap was automatically capturing everything happening on SurLaTable.com, and they could ask any question of that data in real time, they didn't have to wait until after Black Friday was over to act on these results.

Overall, Heap has helped Sur la Table build a culture of iterative, data-driven decision making with a focus on customer experience.

"Our developers sat with the Heap solutions team and got it right away. It was a totally different approach."

WALTER EUYANG,
ECOMMERCE AND MARKETING ANALYST

6%

Increase in
Completion Rate

THIRDLOVE

Higher Conversion Rates
with Data

ThirdLove is a fast-growing e-commerce brand founded with a mission to create a better bra for all women. Founded in 2013, the company has combined innovative design and patented technology to create bras that "fit real women."

As a leading digital brand, ThirdLove's success has been fueled by applying a data-driven strategy to create a better product and customer experience. By enabling ThirdLove's analytics function, Heap empowers ThirdLove to ask more questions, get deeper insights, and iterate quickly in order to deliver the optimal customer experience.

"We wouldn't have been able to understand the story behind the conversion rate if we couldn't see the elements behind it and how people behaved. Heap helped us understand the results and we have since iterated to find a new winning version."

AMANDA ROSENBERG,
HEAD OF MARKETING ANALYTICS

One of ThirdLove's main acquisition channels is the FitFinder quiz that helps women determine the best size and style of bra for their unique body shape and size. Understanding user behavior and how to improve the experience is a major priority for everyone at ThirdLove. Understanding user behavior and how to improve the experience is a major priority for everyone at ThirdLove. Many of ThirdLove's key tests involve iterating on this flow and Heap drives key insights, which help decide what to test and then allow for easy analysis. Heap insights paired with testing helped **increase FitFinder completion rate by more than 6%** in just a few months.

Optimizing the Mobile Experience

ThirdLove's digital strategy also includes optimizing the mobile experience. With Heap, it is simple to compare how browsing behavior differs across devices and also understand how a user's experience changes across platforms.

Understanding a user's journey led ThirdLove to discover that device-switching wasn't happening as often as previously thought and that there were a high volume of first purchases were occurring on mobile. This paved the way for a renewed focus on the mobile experience both on site and through marketing. Using Heap, the company optimized their mobile design and saw a significant increase in customers adding products to cart and a 50% increase in mobile conversion

Creating a Holistic View of the Business

Heap SQL has enabled a more complete dataset, greater data access, and engineering time-savings. With their database now built out, ThirdLove's data team leverages Heap SQL to connect its Heap data with other data sources, including historical sales and fulfillment center data. By piping their Heap data into the database alongside these sources, ThirdLove is able to get a more holistic view of its users.

50%

Increase in
Mobile Conversion
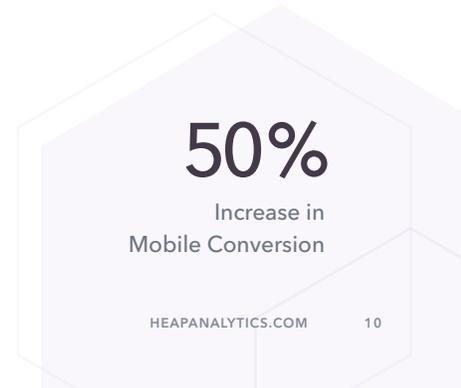
This data is then connected in Looker, where key metrics are shared across the organization. Having access to all of this centralized data has made it a lot easier for people across the company to access and analyze data without any bottlenecks. Between consuming data in Looker, running queries directly against the database, or doing ad hoc analyses in the Heap UI, Heap has provided easy access to data to ThirdLove's entire team.

Building a Data Mindset: "Access to Data was Key"

As a high-growth and fast-moving company, ThirdLove can now iterate quickly since they have easy data access for faster analysis. More teams have access to data and it doesn't require a large team to maintain. The product team uses Heap when new features are launched and to understand things like the impact of speed changes on conversion. The marketing team uses Heap to help understand traffic volume by source and customer behavior with new landing page designs. The ThirdLove team continues to get more complex with the types of analysis they are able to do.

15% to 20%
Savings of Engineering Time

Introduction

Artificial intelligence. Mobile payments. Blockchain. The financial services industry has seen more disruption in recent years than most. And as with most change, only the most innovative and adaptable organizations survive. For many financial services organizations, this means creating growth from digital channels. So more than ever, these organizations are focusing on A/B testing, attribution, and optimizing the conversion funnel.

To set up these programs successfully, it's important for fintech companies to get the most out of their data. Instead they often have a firehose of data, but no way to leverage it to extinguish the fires in their business. Organizations like Lending Club and OppLoans have moved past this firefighting stage — they're collecting data so they can analyze their data in entirely new ways — even retroactively. This helps them get a 360-degree view of their customers, reconciling different touches and devices.

:::: LendingClub

More Data, More Happy Customers

Lending Club is an online financial community that brings together creditworthy borrowers and savvy investors to help both benefit financially. Founded in 2006, the company is the world's largest online credit marketplace and has facilitated over $18 billion in loans to date, including personal and business loans, as well as education and medical financing.

Behind the scenes, the Product Analytics team at Lending Club is creating infrastructure to make the organization of over 1,000 employees as self-sufficient as possible. The team also manages A/B testing, web analytics, customer surveys, customer feedback, and SEO. Since implementing Heap, they have already made a big impact. In one big win, the team was able to discover small points of friction in the customer experience – a find that's helped them to serve thousands of additional customers.

Insights from Combining Data Sources in Redshift

In addition, Lending Club has been using Heap for A/B test tracking and detailed persona creation. In both cases, they pull multiple data sources into Redshift alongside their raw Heap data to glean deeper insights. With A/B testing, they can enrich Heap data with testing control information, export it to Redshift, and model it however they'd like.

By combining Heap data in Redshift with user data that lives in their database (e.g., credit score, location, age, etc.), they're creating holistic user personas to see how demographics impact site patterns. Because a big portion of traffic to their site comes from mobile, the Product Analytics team is using Heap to inform how to optimize the mobile loan application experience.

Making Everyone Data-Informed

Beyond their big wins with validation error analysis, A/B testing, and persona development, Lending Club gets a lot of value from the unexpected workflow changes that come from using Heap. Namely, fewer meetings and faster decision-making.
The team is building out lightweight dashboards for the rest of the company, but also wants to help everyone go into Heap and explore raw data themselves.

"People are conditioned by incumbents to want these big metrics like page summary," Lending Club Director of Product Analytics Alan D'Souza said. "But those aren't actionable. What improves things for our customers are specific questions, which is why we want to spend as little time as possible on these high-level, feel-good numbers and more time on the specific things that create value day-to-day. Heap is the only tool I've encountered that lets everyone instantly answer business questions."

"I simultaneously installed the Mixpanel, Amplitude, and Heap scripts. Ten minutes later, we're getting all of this data in Heap, and nothing in the others. Heap just worked."

ALAN D'SOUZA,
DIRECTOR OF PRODUCT ANALYTICS

5%
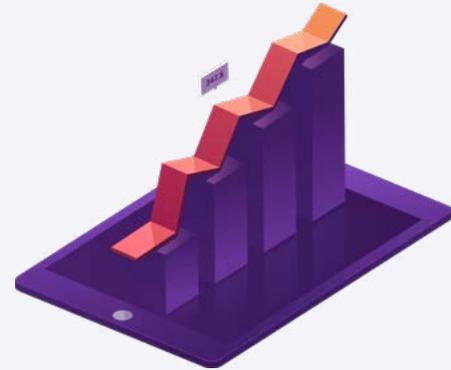
Increase in
Conversion Rate
for Direct Mail

OppLoans®

Putting the "Fun" Back in the Conversion Funnel

OppLoans is a socially responsible, profitable FinTech company that has grown 2000% over the last 3 years, and is backed by a global investment firm with $100M+ in AUMs. The company's recent accolades include being named one of the fastest-growing companies in the USA by Inc. Magazine's list of 500, the third fastest-growing startup by Built In Chicago, and 6th best company to work for nationally by Glassdoor.

OppLoans required a real-time, maximally granular view of datasets including credit reporting, loan performance data, marketing and product analytics. Specifically, the marketing team hoped to optimize user-attribution to improve funnel performance, but the answer was not available internally.

As a growth-stage startup, OppLoans possesses a nimble – and busy – engineering team that cannot be burdened with building, testing, and implementing a homegrown set of solutions.

For OppLoans, the optimal solution was a turnkey platform that offered robust and codeless analytics, provided comprehensive datasets, and had the capacity to iterate rapidly.

"Heap enabled us to identify and eliminate friction in the customer experience."

MATT GOMES,
MARKETING MANAGER

A 7-Figure Lift in New Issued Principal

Conversion Rate Optimization

"Heap enabled us to identify and eliminate friction in the customer experience," said Matt Gomes, Marketing Manager. "When Heap showed us, with specificity, how the fourth step in our funnel was broken, we were able to make meaningful improvements to our pre-pop experience. This resulted in a seven-figure lift in new issued principal annually and a **5% increase in conversion rate** for direct mail."

Accelerated Partner Onboarding

After achieving success with direct mail, OppLoans saw Heap application in the partnership channel. Previously, no OppLoans partner used their API in precisely the same way. Heap provided a standardized, user-friendly interface, and OppLoans was able to launch new partnerships faster.

"Because of the Heap offering, even our less technical partners benefit from our new API process," O'Reilly said. "We now have direct, real-time visibility into how—and how fast—our partners interact with our system. This has yielded more than 2,000 additional

apps from each partner simply because we can now onboard faster."

OppLoans' use of Heap has evolved as new teams have found additional ways to benefit from the platform.

"Originally, only our acquisition team utilized Heap to enable better user attribution," said O'Reilly. "Our use case then expanded into our direct mail, business analytics and partnership teams. We've even begun investigating using Heap data in our fraud detection department to identify suspicious behaviors from clusters of IP addresses."

While Heap's data-capture capabilities have enabled faster issue detection and reduced burden on the engineering team, the ultimate benefit was a seven-figure lift in OppLoans' annualized revenue.

Introduction

If you're in the software industry, you might want to grab another cup of coffee. According to McKinsey, if a software company grows at only 20%, it has a 92% chance of ceasing to exist within a few years. This means that software companies — and particularly SaaS companies — must take every advantage possible to stay alive in a make-it-or-break-it industry.

Customer data can empower that competitive edge. Whether it's optimizing your conversion rate, finding the channels that provide the highest return, or creating an army of loyal customers through an impactful brand, it's possible to create real data-driven strategies for marketing and products. By using Heap to capture, analyze and connect their data, SaaS companies like Envoy and CrunchBase and using their own data to take their company to the next level, now and for years to come.

crunchbase

Closing the User Analytics Gap

For millions of users worldwide, CrunchBase serves as a primary source of company, investment, and industry data. The platform delivers the most accurate, up-to-date data available, which is reviewed daily and sourced from 200,000+ contributors, 2,000+ venture partners, and millions of data points across the web.

Internally, marketing and product efforts are closely tied. CrunchBase has a highly engaged ecosystem of partners and community members that the company communicates with every day to drive engagement and share highly personalized news and updates. Since launching out of AOL in September 2015, the team has been working on building a platform and expanding their already extensive dataset.

"Before Heap, we didn't have much information around specific user actions beyond big picture metrics. Now we do."

GIANNI ARGIRIS,
CRUNCHBASE PRODUCT MANAGER

Since installing Heap, the team can work with a complete dataset, enabling them to meaningfully segment users, explore user behavior in the site and interaction with marketing content, and ask questions that they never could before.

Some core questions include:

- How do different user cohorts interact with CrunchBase, and how do we get them to engage further? What are different user cohorts doing onsite that might signal intent (to purchase one of our Advanced and Commercial products, to contribute, etc.)?

- What are the personas of our buyers for our premium products?

- How do we define success? Specifically, how do we define baselines for different marketing campaigns? Is a 17% conversion rate good, or is 3%?

Powering New Product Development

The Product team loves that Heap helps explore unknown unknowns. With Heap's List View, "you discover a lot of little things, specific patterns in user behavior signaling that people may not fully understand the product's capabilities," says CrunchBase Director of Marketing Alexandra Mack said. "You can then modify your product and messaging to guide them to engage more and understand the full capabilities of CrunchBase."

Just a few short weeks after installing Heap, the CrunchBase team had already collected enough information from millions of users to start optimizing product usability and designing user flows to drive the behavior they wanted to see on the site.

Data Visibility for the Entire Team

With Heap's Event Visualizer, team members don't need to write code, worry about submitting one-off requests, or maintain a tracking plan. Heap enables everyone from leadership to heads of content, operations, and engineering to quickly view product and website performance through a shared, verified, and trusted definition set.

"Instead of hosting separate meetings, soon we'll have a single marketing, product, and sales weekly meeting to go over everything from email funnels to new development together," CrunchBase Product Manager Gianni Argiris said.

A Single Source of Truth

Today, Heap gives CrunchBase the ability to view a holistic source of data for all their products and users, including CrunchBase and CrunchBase Data. Automatic data collection saves the team significant time and generates a complete dataset from which they can define stronger user personas, rapidly test and iterate on new product features, and build targeted marketing campaigns that better convert.
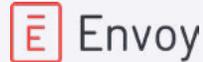
Envoy
A Smarter User Acquisition Strategy

Envoy's mission is to challenge the status quo of workplace technology. The company has set a new standard, and now visitors everywhere are signing in on iPads. To date, the company has helped customers like Slack, Box, Github, and Pinterest welcome over 27 million visitors in more than 7 thousand offices worldwide.

After fully rolling out Heap, the Envoy team had a complete picture of its entire user journey for the first time ever. Heap's automatic data capture meant the company no longer had gaps in its understanding of users.

In addition, Heap's best-in-class identity management meant that Envoy could seamlessly merge users across devices, merge anonymous identities with identified users, and more without worrying about a complex sequence of aliasing

API calls that many analytics providers require to reconcile identities.

Heap also empowered Envoy to stop relying on multiple vendors for marketing attribution. The company finally had a complete, centralized view of which campaigns were associated with outcomes. Heap allows Envoy to get granular on who is doing what, when, and how. For the first time, they're able to do marketing attribution on our own rather than relying on third party tools.

How Complete Data Changed Envoy

Heap gave Envoy the complete dataset to look at user acquisition for the first time ever. The company realized that its trials to paid customer conversions were a lot lower than they originally thought. It turned out the onboarding flow wasn't as effective as the company wanted in getting users fully activated.

As a result, Envoy created a new setup guide to take people through those on-boarding steps more effectively. This is a new target for more future optimizations.

Using Heap SQL for New Levels of Access

Heap was one analytics tool that worked with so much of what Envoy was already used to dealing with. For the team, Heap tracks everything, and pushes that data downstream to its Redshift instance, where it can apply typical data science efforts in a manner the company is used to. This means there was almost no learning curve.

Giving Data to Other Groups

Envoy has a rule called the 60/30/10 rule. It means 60% of questions should be answerable by functional groups by themselves, with no assistance. Thirty percent of questions should be answered by functional groups with some assistance. Ten percent of questions need to be done by a data science team. Heap has allowed Envoy to achieve this goal by democratizing the company's data.

"After fully rolling out Heap, the Envoy team for the first time ever had a complete picture of our entire user journey. Heap's automatic data capture meant they no longer had gaps in their understanding of their users."
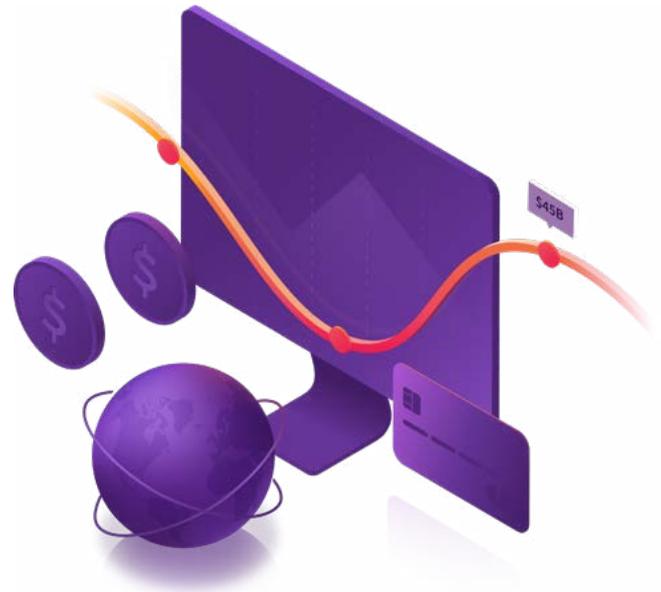
ARVING RAMESH,
DATA SCIENTIST

The results from innovative, fast growing companies like NatureBox, Lending Club, and Envoy prove that regardless of industry, size, location, and business challenges that using data — and being able to trust that data — can have a huge impact on revenue, internal processes, and the customer experience.

These companies didn't have a magic wand either — they used a combination of Heap, creativity, and the willingness to think out of the box.

But as always, the proof is in the pudding.
Learn more and try Heap yourself for free.

HEAP

HEAPANALYTICS.COM