

How Showpad Gave Frontline Teams One Account View While Its Systems Merge

INTRODUCTION

Showpad helps sales and marketing teams manage content, coaching, and buyer engagement in one platform. In 2025, Showpad and Bigtincan came together to form a single AI-native revenue enablement company. That combination brought two established product lines, two customer bases, and two sets of go-to-market systems under one brand.

A merger like this creates a real data problem for customer success and sales teams. The same account can now show up across multiple products, multiple Salesforce histories, and multiple support and usage systems. Showpad is working through that systems consolidation carefully and on its own timeline. In the meantime, frontline teams couldn't wait: they needed one view of each account today, not once the broader technology merger was complete.

KEY OUTCOMES

2,100+

Customer accounts unified into one view

500K+

Conversations reconciled into a single model

200K+

Contacts brought into one relationship view

15+

Product platforms merged under one graph

CHALLENGE

- Unify account, product, usage, and support data across multiple Salesforce environments and product lines into one model of customer truth
- Give CS, sales, and account teams a single view of an account that covers every product it owns, instead of a separate view per product line
- Surface expansion, adoption, and renewal signals automatically across a large, growing customer base
- Ground meeting prep and account reviews in current data instead of manually assembled notes
- Support a global customer base with data coming in from systems across North America, Europe, and Asia-Pacific
- Give the team's AI tools, like Claude, a reliable source of account context instead of having them query raw systems directly

REQUIREMENTS

- One context layer spanning both Showpad and Bigtincan systems, not a per-product view
- Reconciliation of two Salesforce orgs, two Zendesk instances, and regional usage data into a single model
- Automatic signals for expansion, adoption, and renewal risk across the full account base
- A grounded context source for AI tools like Claude, instead of raw system access

SOLUTION

FunnelStory sits on top of Showpad's systems as they exist today, giving teams one account view now, independent of when the underlying technical consolidation completes.

- **One graph, every product.** FunnelStory models each account with the full set of products it owns, so a single customer record reflects the entire relationship, not just one product line.
- **14 systems, one model.** FunnelStory pulls in and reconciles data from 14 systems spanning both sides of the merger, including two Salesforce orgs, two Zendesk instances, Zoom, Gong, Slack, Pendo, and regional data warehouses across North America, Europe, and Asia-Pacific.
- **Needle Movers at scale.** Needle Movers continuously flag the account-level signals that matter, like expansion readiness and engagement changes, across the full customer base.
- **Meeting prep from real data.** Instead of building briefing docs manually, Showpad's teams pull account and meeting prep straight from the graph.
- **Claude connected to the context graph.** Showpad connects Claude to FunnelStory through the MCP server for faster, more reliable answers with fewer tokens.
- **Agent flows on top of the graph.** FunnelStory agents also watch the graph on their own, flagging key personnel changes and monitoring data freshness.

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After the merger, our biggest challenge was that an account's story lived in two different Salesforce orgs and two different sets of product data. FunnelStory gave us one place to see the whole customer, across every product they own. Our team relies on it daily, and now Claude does too, through FunnelStory's MCP server, so we get fast, grounded answers instead of digging through five systems ourselves.

Trevor MartinDIRECTOR, CUSTOMER OPERATIONS,
SHOWPAD

THE PROBLEM DURING THE MERGER

Bringing Showpad and Bigtincan together under one brand meant bringing together two separate sets of go-to-market systems. Each side had its own Salesforce instance, its own support desk, and its own product usage data. Without something to tie it together, teams only ever saw part of an account's story, depending on which system they happened to be looking at.

HOW FUNNELSTORY FITS IN

FunnelStory's Customer Intelligence Graph now covers Showpad's combined technology stack, 14 systems in total: two Salesforce orgs, two Zendesk instances, Zoom, Gong, Slack, Pendo, and regional product usage warehouses across three continents, all reconciled into one model of account truth. Every account is represented with the full set of products it holds, so teams can look at a customer's entire footprint instead of piecing it together product by product.

On top of that graph, Needle Movers watch for the signals that matter for a revenue enablement business, like expansion readiness, engagement changes, and renewal risk, and surface them automatically. Account and meeting prep pull from that same live data, so teams walk into customer conversations already up to speed.

Showpad's team also connects Claude to the graph through FunnelStory's MCP server. Instead of Claude re-deriving account context from scratch on every question, it queries FunnelStory's pre-computed graph directly, for faster responses, more consistent answers, and lower token usage per query.

The graph also runs its own agent flows in the background: alerting the team in Slack and email about personnel changes at key accounts and monitoring product data freshness, without anyone having to ask.

THE IMPACT

- ◆ **One customer, one view.** CS, sales, and account teams see the full multi-product relationship for all 2,100+ accounts in one place, instead of piecing it together across systems inherited from the merger.
- ◆ **A single model of record.** 500K+ conversations and 200K+ contacts, once split across two companies' systems, now live in one connected model.
- ◆ **Signals surfaced automatically.** Needle Movers do the work of watching for expansion and risk signals across the customer base, so teams don't have to review every account by hand.
- ◆ **Meeting prep grounded in real data.** Account reviews and meeting prep start from live, connected data instead of notes assembled by hand.
- ◆ **Claude that actually knows the account.** With Claude connected through FunnelStory's MCP server, Showpad's team gets fast, grounded answers to account questions instead of generic responses built from scratch each time.
- ◆ **Uninterrupted customer experience.** Because account teams could see the full relationship from day one, customers felt continuity in service and support throughout the merger, even while the underlying systems were still coming together.
- ◆ **Routine work running on its own.** Agent flows built on the graph watch for personnel changes and data freshness issues, and act on them without a person kicking off the process.

FunnelStory's Customer Intelligence Graph connects product usage, support, CRM, and conversation data into a single, queryable model of customer truth, giving both people and AI tools like Claude one grounded source of context instead of a dashboard or raw system per question.