

How Trellix Runs Its Customer Intelligence Layer Entirely On Its Own Infrastructure

INTRODUCTION

Trellix is a global cybersecurity company, built from the combination of FireEye and McAfee Enterprise, delivering threat detection and response across cloud, on-premises, and operational technology environments. Security and data control aren't just product features for Trellix. They're the standard the company holds itself to internally, including in the tools its own team uses to manage customer relationships.

That standard shaped what Trellix needed from a customer intelligence platform: the same Customer Intelligence Graph, AI agents, and grounded AI answers other FunnelStory customers get, but running entirely inside Trellix's own environment, with no customer data leaving it.

KEY OUTCOMES

11K+

Customer accounts unified into one Customer Intelligence Graph

250K+

Conversations reconciled into a single model

100K+

Contacts brought into one relationship view

15K+

Support tickets connected directly to account context

CHALLENGE

- Keep all customer intelligence data inside Trellix's own environment instead of a third-party multi-tenant SaaS
- Unify account and support signals that were scattered across multiple existing systems into one Customer Intelligence Graph
- Use Trellix's own approved AI provider instead of being locked into a single vendor's model
- Get proactive, automated account intelligence from AI agents without giving up control of where the underlying data lives
- Support a large, multi-region, multi-product customer base with one consistent account structure

SOLUTION

- **On-prem by design.** The full Customer Intelligence Graph, including data storage and processing, runs inside Trellix's own private cloud, so the intelligence layer never has to move customer data outside Trellix's environment.
- **Bring your own AI provider.** Through FunnelStory's LLM Bridge, Trellix connects the AI provider of its choice, keeping control over which model grounds its answers and how.
- **One graph, unified.** FunnelStory brings together account, support, and relationship data that used to live in separate systems into a single Customer Intelligence Graph, organized around Trellix's real account structure across regions.
- **AI agents doing the work.** Running entirely on Trellix's own infrastructure, FunnelStory's AI agents continuously surface account intelligence from the graph, so Trellix's team sees what needs attention without manually reviewing every account.

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Data control isn't negotiable for us, and that includes the tools our own team relies on. FunnelStory gave us a real customer intelligence layer, AI agents included, running entirely inside our own environment, with the AI provider we choose. We get the intelligence without giving up control.

Brent ZakaryanDIRECTOR OF CUSTOMER ANALYTICS,
TRELLIX

THE PROBLEM

As a cybersecurity company, Trellix holds a high bar for where its data lives and who can access it, and that bar applies internally as much as it does to the products Trellix sells. At the same time, account and customer signals were spread across multiple existing systems, making it hard for the team to get one clear, grounded view of a customer relationship. A standard SaaS platform could unify that data, but only by asking Trellix to send sensitive customer information outside its own environment. For a security company, that wasn't an option.

HOW FUNNELSTORY FITS IN

FunnelStory worked with Trellix's team to deploy its Customer Intelligence Graph as a private-cloud installation inside Trellix's own infrastructure. The result is the same unified, grounded model of customer truth that FunnelStory delivers everywhere else, built entirely from data that stays inside Trellix's environment.

On top of that graph, Trellix connects its own preferred AI provider through FunnelStory's LLM Bridge, so the intelligence layer runs on terms Trellix controls. AI agents built on the graph continuously watch the account base and surface what matters, giving Trellix's team proactive account intelligence without asking them to compromise on data control or AI provider choice.

The same graph also brings together account and support data that used to live across multiple separate systems, rolling it up into one consistent view organized around Trellix's actual account structure, spanning a large, multi-region customer base.

THE IMPACT

- ◆ **Data stays where it belongs.** The full Customer Intelligence Graph runs inside Trellix's own environment, with no customer data sent to a third-party multi-tenant service.
- ◆ **A single model of record.** 11K+ accounts, 250K+ conversations, and 100K+ contacts, once scattered across separate systems, now live in one unified Customer Intelligence Graph.
- ◆ **Freedom to choose an AI provider.** FunnelStory's LLM Bridge lets Trellix connect the AI provider it trusts, instead of being locked into one vendor's model.
- ◆ **AI agents doing the legwork.** Agents built on the graph run on Trellix's own infrastructure, surfacing account intelligence so the team doesn't have to review every account by hand.
- ◆ **One graph for a complex business.** Account and support data that used to live across multiple systems now shows up as a single, unified graph across Trellix's full, multi-region customer base.

FunnelStory's Customer Intelligence Graph can run as a private-cloud deployment inside a customer's own infrastructure, with a bring-your-own AI provider through LLM Bridge, so security-conscious organizations get the same grounded intelligence layer and AI agents without giving up control of their data.