

CRM and marketing support to a US-based investment bank

Creating a centralised repository for reusability

Integrating investment banking (IB) and customer relationship management (CRM) support

Facilitating a 20-30% improvement in response rate

CLIENT CHALLENGES

- The client was looking for an alternative outsourcing partner for support on business-development (BD) offshoring support
- Wanted to deploy resources with an IB background and could contribute to the CRM and marketing work streams

OUR APPROACH

- Deployed 2 FTEs to provide IB and CRM support tasks and 1 FTE formatting/graphics specialist
- Operated as a pure extension of the onshore team supporting MDs, VPs and associates in the US and Canada offices on marketing and CRM work as well as pitch support
- Provided support on the following:
 - Contact research and validation
 - Email testing and domain verification
 - Updating information on Salesforce
 - Preparing rationale, mailers and teeing-up outreach and follow-up emails
 - Activity logs and communication trackers
 - Newsletters/market updates

IMPACT DELIVERED

- Integrated IB, CRM and marketing support for faster turnaround of projects across multiple service lines

- Streamlined the process of reaching out to potential targets and following up with them, facilitating a 20-30% improvement in response
- Deployed standard methodologies and a centralised repository to increase reusability, avoid duplicating effort and increase efficiency
- Ensured soft alignment among FTEs for easy transition, to cross-utilise when volumes increase in either the IB or CRM support area
- Deployed the right-skilled and trained resources with experience in IB research and CRM and Salesforce to execute BD tasks

About Acuity Knowledge Partners

Acuity Knowledge Partners is a leading provider of high-value research, analytics and business intelligence to the financial services sector. The company supports over 650 financial institutions and consulting companies through a team of over 6,000+ subject matter experts who work as an extension of the clients' teams based out of various global delivery centres.

We empower our clients to drive revenues higher. We innovate using our proprietary technology and automation solutions. We enable our clients to transform their operating model and cost base.