

CRM migration support to a technology-focused European investment bank

Cleaning data of 80k+ contacts

Providing end-to-end CRM migration support

Central point of contact for CRM migration process

CLIENT CHALLENGES

- The client was looking for support on CRM migration and data cleaning and enriching

OUR APPROACH

- Hired a CRM expert for CRM migration and contact enrichment
- Liaised with the onshore CRM team providing CRM migration and maintenance services to offices in the Americas, the UK and Europe
- Set up a structured CRM team supporting key areas, including the following:
 - Coordinating with CRM points of contact from the different offices to collate contact details
 - Standardising the information and filling gaps before migration
 - Mapping and removing duplicate contacts
 - Loading missing data to DealCloud
 - Adding activity logs and communication trackers to DealCloud
 - Updating contact details on a regular basis using primary and secondary research

IMPACT DELIVERED

- Cleaned and aggregated data for 80k+ contacts and related data
- Completed end-to-end migration, cleaning and streamlining CRM data
- Coordinated with multiple client offices as a central point of contact for the CRM system migration process
- Integrated IB and CRM support for faster turnaround of projects across multiple service lines
- Ensured soft alignment among FTEs for easy transition, to cross-utilise on IB or CRM support areas

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