

Datamatics Delivers a
**100% ACCURATE CRM DATA
HYGIENE SOLUTION** for a
Leading Investment Bank



ABOUT THE CLIENT:

The client is an American multinational independent investment bank and strategic financial advisor. It has established one of the largest worldwide financial advisory practices and is renowned for its transaction expertise and leadership in the field of valuation and financial services.



INDUSTRY FOCUS:
BFSI

GEOGRAPHY FOCUS:
Global



OVERVIEW:

The client faced several issues due to the lack of data hygiene which resulted in the missing vital customer information. Lack of in-house capabilities for real-time updates meant loss of time and efficiency. The expectations were to cleanse the datasets and eliminate duplicate and incomplete data. We successfully addressed the data management issues and created accurate customer data for better business outcomes.



HIGHLIGHTS:



200K+
customer records
processed



DATABASE - WIDE
HYGIENE CHECK
to ensure accuracy



100%
contact reachability
achieved

BUSINESS CHALLENGES:

Being a leading investment bank and a financial advisor, the client had some unique data challenges –

- Cleanse & manage high data volumes collected from various sources
- Eliminate redundancies and consolidate the legacy data
- Standardize & attain single view of customers
- Real time updates on Salesforce CRM to enable intelligent decision making

DATAMATICS SOLUTION

We had a dedicated team of 10+ data experts looking after the entire data cleansing project and carrying out quick diagnosis to identify redundant and duplicate data along with missing vital data points. We offered a robust training program to acclimatize with the clients' CRM landscape. Strenuous quality checks & process changes were introduced across the system to ensure complete data accuracy.

THE SOLUTION HIGHLIGHTS:

- Merged & converted multiple contact formats from multiple data sources.
- Classified contacts with relevant industry sectors for better efficiency.
- Real-time CRM updates to eliminate duplicates, identify missing information & segmentation
- Comprehensive customer data coverage with valid phone numbers & email addresses

BUSINESS BENEFITS:

60%

Reduction in data maintenance cost

100%

Accuracy in delivering unique customer records

90%

Increase in database accuracy

4,000+

duplicate company data and **10,000+** duplicate contact data

Data validation to ensure

100%
reachability



ABOUT DATAMATICS BUSINESS SOLUTIONS

Datamatics Business Solutions is a technology-driven outsourcing partner for global enterprises. With our AI-based data solutions, we deliver 100% clean, structured, and customized B2B data solutions to global Fortune 1000 companies, growing enterprises, and start-ups.

With our hybrid data delivery model employing human data expertise and the digital ecosystem we have been able to deliver B2B data solutions with utmost precision resulting in shorter sales cycles and growing revenues for our global clients.