



### CUSTOMER RESULTS

The CTI solution resulted in optimization of sales and marketing engagements with the Client base and improved insight into Client performance across channels, territories, funds and affiliates.

## Case Study: Sales and Marketing Analytics

Client: A Global Financial Services Company

### SUMMARY

Corporate Technologies established a BI Roadmap for the existing DW/BI system to radically reduce data gaps and properly model and deliver “360 degree analytics” to optimize Client engagement, Client revenue, and marketing effectiveness.

Industry	Financial Services
Client	A \$1T Global Asset Manager
Problem	<p>This global firm operates a complex multi-affiliate business model that provides access to specialized investment firm’s products delivered to both institutional and retail clients. Reliable data regarding the Client relationship and activity, the lifeblood of the sales organization, needed urgent improvement – both from an accuracy and timeliness standpoint. The recent deployment of Salesforce.com added further challenges to the “client data picture”. The legacy BI/reporting architecture could not address needs such as:</p> <ul style="list-style-type: none"> <li>• A consolidated view of the Client’s business value (i.e. fee revenues) throughout the relationship lifecycle</li> <li>• Ability to measure marketing campaign effectiveness across multiple segments</li> <li>• Ability of the sales teams to “slice and dice” the Client’s performance across a variety of products and services in a timely and user friendly way</li> </ul>
Solution	<p>CTI executed both a business need and data assessment discovery process and identified critical gaps with the Client, Sales, and Financial models and the underlying data quality. CTI designed a revised model and created an incremental roadmap to evolve the legacy system to:</p> <ul style="list-style-type: none"> <li>• Deliver a “360 degree view of the Client” across Channels, Territories, Funds, and Affiliates and</li> <li>• Enable the ability to conduct segmentation and peer level benchmarking.</li> <li>• Define a Master Data Management strategy that provided tangible requirements for data governance and an MDM solution.</li> </ul>

Benefits	<p>CTI scoped and planned a roadmap to:</p> <ul style="list-style-type: none"> <li>• Enable Finance, Sales and Marketing to review Client performance across Channels, Territories, Funds and Affiliates</li> <li>• Optimize sales and marketing engagement with the Client base</li> <li>• Provide marketing with a “closed loop” capability for assessing multi-segment campaign effectiveness</li> <li>• Provide IT with a detailed 3-6-9 month project plan with a “quick-win” 3 month initial phase (to deliver in partnership with the business)</li> <li>• Show how Master Data Management will become a critical capability in the future BI plan</li> </ul>
Technologies	<p>Tableau Informatica SAP Business Objects Netezza SalesForce.com Marketo</p>

## CONTACT US

We are a systems integrator and solutions provider located in Burlington, Massachusetts serving customers in New England, Metro New York, Atlanta and beyond.

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## ABOUT CORPORATE TECHNOLOGIES

CTI provides high value services to clients. Through the effective application of technologies like Business Intelligence, Data Integration and Management, Enterprise and Cloud Computing, we help clients implement the right IT solutions to empower business innovation and dynamic scalability. From leveraging business intelligence to rethinking the efficiency of the data center, we are your strategic partner for everything from data management to information delivery.

Today's IT solutions have to be highly integrated to solve the complex business challenges that organizations face. Your business cannot afford to work with multiple consulting organizations specializing in “silos of experience.” Corporate Technologies' engineering team understands how the implementation of any new technology must support both the business and infrastructure requirements.