

# A Large Asset Management Company Improves Its Global Customer Experience with a Single CRM

## Trantor lead the transformation!



### Client

The client is one of the largest, asset management companies with multibillions in global assets.

### Industry

Asset Management

### Business needs addressed

The client had five separate CRM systems for its sales teams of different business units. The client was looking for a simple solution that would bring down its maintenance cost and give a more consolidated view of its clients.

### Trantor solution

Trantor reconstructed client's existing CRM expediting reporting, that helped in improving sales co-ordination and identifying opportunities.

### Business Benefits

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**3X** improved customer experience

**70%** saving on CRM services

**Better** customer tracking and reporting

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***“A single well-defined system to handle all our services. The customer is not bothered by multiple calls for different services, saving us a lot of time and money. Trantor did an amazing job, will surely recommend.”***

- Chief Technical Officer, IT

### Objective

A single comprehensive CRM solution that's faster, flexible and more user-friendly.

### Project Goals

- Merge multiple CRM systems into one platform
- Rigorous change management and business enablement

### Business Matters

The client was able to save more than 70% on CRM services. Better tracking of sales productivity along with improved customer service.

## The Problem

The client was looking for an all-inclusive, user-friendly platform to help categorize its cross-sell and up-sell opportunities. It needed a flexible platform to be used by its globally spread sales teams.

- The multiple CRM systems couldn't provide a unified customer view
- They were outdated and cost-intensive
- The client needed a solution with customized localization for its different sales units

## The Trantor Approach

After thoroughly analyzing the client's business model, Trantor deduced that moving the different CRM systems to Salesforce ecosystem was the best solution. Trantor assembled a team of Salesforce experts, a technical architect and data migration professionals. Trantor's team worked collaboratively with the client's IT team for a smooth transfer.

*“Exhaustive analysis and segmentation helped smooth migration to a unified platform without any glitches.”*

## The Solution

Trantor created a change management strategy and worked in planned phases:

- Divided the data migration into segments so as not to affect the ongoing business
- The data was cleansed before migration to avoid errors
- Applied Force.com Migration tool along with DbAMP for loading data in batches
- Followed Agile methodology for sequential integration and data migration

## The Benefits

- Better tracking of customer scenarios
- 70% saving on CRM services
- Improved customer experience with a single tracking system

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## About Trantor

Trantor delivers innovative technology solutions, which enable our clients to achieve their business objectives at reduced cost. With expertise in both Cloud-based and traditional applications, we understand all aspects and challenges of software development from product and feature definition to core product development and QA, deployment, and ongoing maintenance. Our deep experience in Salesforce, Fintech, Ecommerce, Captive Centers, and Custom Software Development is unparalleled.

## Contact Us

- ✉ [info@trantorinc.com](mailto:info@trantorinc.com)
- 📞 +1 (650) 646 7818
- 📍 [www.trantorinc.com](http://www.trantorinc.com)