

Financial Services company accelerates CRM migration through automation



The Challenge

Migrating client data from a legacy CRM system to a new system quickly and accurately to ensure compliance and continuity of operations



The Solution

Design and deployment of a fully automated process to extract client details, including their personal information and details of their investments, insurance and mortgages, then rekey this information into their new CRM system



The Results

The accurate transfer of thousands of client records including historical information over a weekend

✓	Accuracy in transactions	100%
✓	Increase in productivity	100%
✓	Complex Processes Automated	Yes
✓	Reduction in hours spent on repetitive tasks per year	3,000