



Client 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

Industry: Financial Services

Client: A Global Financial Services Company

CTI 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 \$1Tn 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"> • A consolidated view of the client’s business value (i.e. fee revenues) throughout the relationship lifecycle • Ability to measure marketing campaign effectiveness across multiple segments • 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



Domain Knowledge

For more than 20 years we have successfully used our industry domain knowledge and extensive implementation experience to deliver business solutions.

Business Insight Through Analytics

Our experts employ advanced analytics to uncover actionable insights buried in your organizations information stores to help optimize your business.

End-to-End Data Management

We protect, combine and prepare data from many sources and deliver it in the right format at the right time to fuel great analytics and business processes.

Contact Us

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Solution

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:

- Deliver a “360 degree view of the client” across channels, territories, funds, and affiliates and
- Enable the ability to conduct segmentation and peer level benchmarking.
- Define a Master Data Management strategy that provided tangible requirements for data governance and an MDM solution.

Benefits

CTI scoped and planned a roadmap to:

- Enable finance, sales and marketing to review client performance across channels, territories, funds and affiliates
- Optimize sales and marketing engagement with the client base
- Provide marketing with a “closed loop” capability for assessing multi-segment campaign effectiveness
- 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)
- Show how Master Data Management will become a critical capability in the future BI plan

Technologies

- Tableau
- Informatica
- SAP Business Objects
- Netezza
- Salesforce.com
- Marketo