Leading Finance Company Experiences 10x Improvement in its CRM Performance

Trantor's Microsoft Dynamics Skills made it possible!

Client

The client is one of the largest, non-bank alternative capital provider to small and medium businesses (SMB) in the United States.

Industry

Financial services

Business need addressed

The client was using manual processes to update database of over 4 million records and supported more than 100 concurrent users in CRM. There was a need to automate the data import process.

Trantor solution

The team, after understanding the client's process evaluated all the options for batch data import. Trantor eventually proposed complete customization of their CRM.

Business Benefits

10x improvement in data import

60% acceleration in user response times

30% improvement in lead management process

www.trantorinc.com   info@trantorinc.com

> "*The ease and simplicity of the program and the way that the Trantor Team has continued to develop solutions around and integrated with our CRM is simply amazing."*
> - *Manager, Technology & IT*

Project Goals

- Customize Dynamics CRM to automate data import
- Make batch data import a possibility
- Ensure that duplicate records are automatically removed

Technologies Used

- Salesforce APIs
- JAVA
- HTML

Business Matters

The client was able to meet SLAs, maintain data hygiene, and improve operational efficiency. This brought about 15% reduction in cost of operations.

The Problem

The client used to get leads from multiple sources, including Independent Sales organizations (ISOs) and sales consultants. All data was imported manually into Dynamics CRM. This led to multiple problems including:

- Error prone data – with multiple rows of duplicate files, and wrong information
- In efficient process - Data import had become extremely time-intensive, leading to performance issues
- Service-level objectives could no longer be met reliably, reducing productivity

As a result – Dynamics CRM was unable to deliver real value.

The Trantor Approach

The team, after understanding the client's process evaluated all the options for batch data import. Trantor eventually proposed complete customization of their CRM.

TRANTOR

The Solution

- Batch data import greatly reduced the time taken to feed data from Excel files into the Dynamics CRM.

  - The time taken was reduced to one tenth of that taken by a row-by-row processing.

  - client could run 3.5+ million records seamlessly

- Dynamic system of updates was designed so that any new data fields configured could be updated with minor changes.

- Data dedupe feature was added within the API to ensure that only single version of each record is available in the CRM

- Mobile portal was also developed for data import, making it easier for sales representatives on the move to input data.

Data import configuration not only improved the client's overall sales processes and brought cost of operations down by 30%; it also resulted in getting higher and faster ROI on the Dynamics CRM for the client

The Benefits

- 10x improvement in data import
- Up to 60% acceleration in user response times
- 30% improvement in lead management process

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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 fintech, ecommerce, captive centers, and custom software development is unparalleled.

Contact Us

✉ info@trantorinc.com

Ⓢ +1 (650) 646 7818

📍 www.trantorinc.com