



### Industry

- Financial Services

### Products

- Microsoft Dynamics CRM
- Microsoft SQL Server

### Challenge

To better manage marketing campaigns and drive sales goals of new subscribers, the Company's system needed to be updated with more automated features.

### Solution

Neudesic installed a new CRM-based system, and then integrated it with the ExactTarget email marketing platform. The Company's customer database was migrated to the new solution, which also consolidated various databases into one common data source in CRM.

### Benefits

- Increased subscriber sales through managed email and regular mail marketing campaigns
- A scalable solution with greater capacity to manage and utilize customer data
- An ROI of more than \$3 Million, or roughly 40 to 1

## CRM Implementation and Database Migration

Founded in 1963 as an investment management and brokerage firm, the Company has evolved into a national investment information provider, supporting more than 400 major institutional money managers worldwide with equity investment ideas, securities data research, analytic tools, and trading services. The Company maintains one of the most extensive and highly sophisticated databases, tracking detailed historical information on domestically traded companies on the NYSE, AMEX and NASDAQ exchanges. It also tracks individual databases of Canadian securities, mutual funds, economic variables, industries, sectors and market indicators.

*Neudesic's customized CRM implementation and database migration solution has created a greater capacity to manage and utilize customer data and driven new sales through customer based targeting.*

### Project Highlights

## CRM Implementation and Database Migration

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### The Challenge

The Company's current system of providing marketing campaigns and email outreach was primarily a manual process, using excel spreadsheets, Outlook and SQL-based extraction of customer lists. To better manage marketing campaigns and drive sales goals of new subscribers, the Company's system needed to be updated with more automated features.

### The Solution

The Company turned to Microsoft National Systems Integrator and Gold ISV Partner Neudesic to identify its key needs and suggest a possible CRM solution. After Neudesic demonstrated the benefits of Microsoft Dynamics CRM, the Company decided to base its marketing development system on the CRM platform.

Neudesic quickly went to work installing CRM and tailoring the system to the Company's specific marketing needs. Neudesic then integrated the CRM-based system with the ExactTarget email marketing platform, and the Company's customer database was migrated to the new solution, which also consolidated various databases into one common data source in CRM.

### The Benefit

Neudesic's customized CRM implementation and database migration solution has increased subscriber sales through managed email and direct mail marketing campaigns, resulting not only in a greater capacity to manage and utilize customer data, but also the ability to drive new sales through customer based targeting