

CASE STUDY

CRM Consolidation for large US based Fintech

Client Overview

The customer is a leading Fintech organization that provides secure payment services for small and large businesses, including payments online, card machines and telephone payments.

The Challenge


The customer had decided to launch a new business line following a few mergers and acquisitions, and the old systems had to be moved to the new service line. Master data management was the biggest challenge at that point in time given the significant number of entities in the ecosystem. A few entities were still using the Legacy CRM systems whereas few countries entities were already on the salesforce.





The Solution


Opus implemented its One Team Execution framework to build this solution, and going with the “Org merge” approach was recommended. Opus built a few tools to accelerate the org merge processes. The data loader was used to migrate the data from the old org to the new 1SF org framework, and new features were added as a part of the optimization. Custom code was migrated to the new org by making it compatible to the master org i.e. 1SF org.

Benefits Delivered

 Unified entities and eliminated distorted reporting, helping leadership make effective decisions

 Crisp dashboards across several entities

 Successfully on-boarded countries to the new 1SF service line, making it the single source of truth & data

 All the data, objects, rules, users, profiles, company hierarchy and customization of the old org were successfully consolidated to the new 1SF org