

Case Study



Client Profile

Organization

Major credit union

Size

Over 2,600 employees

Industry

Financial services

One of the largest credit unions in Canada, this client has \$14.5 billion in assets, over 407,000 members and 61 branches

The client's products and services fall into three main categories:

1. Personal banking
2. Business banking
3. Investments

AUTOMATED DATA MIGRATION

Business Needs

The client's Foreign Exchange department was using a very basic sales force automation tool to access customer information during transactions. The client was in the process of giving all its departments access to a single, central CRM system. In order to have Foreign Exchange switch to this CRM with minimal disruption, all the data from the sales force automation system would have to be migrated, outside working hours, over the course of a weekend.

Solution

To ensure the data was migrated accurately, securely and on time, Knowledgetech automated the entire process, using Scribe (www.scribeshift.com). Scribe allowed Knowledgetech's CRM experts to create automated work packages that mapped and transformed all the relevant company and contact records, as well as any notes and other attachments associated with these records. In total, more than 200,000 records were migrated, over a 48-hour period.

Benefits

- Migrated more than six years of historical data, in just two days
- Avoided human error while ensuring data integrity and security
- Provided Foreign Exchange staff with access to a centralized CRM – allowing them to access a unified view of each customer, in order to provide better service and maximize share of wallet
- Minimized maintenance fees by reducing the number of systems that needed to be maintained



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