

The main title of the document, 'Data Strategies for Investment Banking', centered in a large, bold, white sans-serif font. The text is framed by white L-shaped corner brackets on the top-left and bottom-right sides.

# Data Strategies for Investment Banking

# WHAT CREATES MESSY DATA?

More than **6 out of 10 organizations** globally, struggle with **reliability & quality of Data**.

## Merger's, Acquisitions, Consolidation

Incorrect or incomplete data acquired from M&A activity



Data duplication & overriding



Varying Data strategies. Data standards, quality, process & technologies for 2 distinct organizations

## Multiple Inputs from business teams

Data coming from disjointed CRM systems, automation tools



Multi-location sales, & business team feeding incomplete or inaccurate data

## Multiple Sources & Disparate Systems

Data captured from campaigns, website, promotional events



A combination of manual & automated processes with poor integration & poor orchestration



Data acquired from third party providers, research projects & subscriptions.



Data standards, quality, process & technologies may be different



**Multiple touchpoints, varied data sources, several martech automation systems – only lead to a 'complex data system'**



# IMPACT OF DATA IN AN ENTERPRISE

RESEARCH SHOWS BUSINESS ARE EXPERIENCING DATA BREAKDOWNS



**70%+**

revenue leaders say data management is a high priority, yet nothing is done about it



**44%**

said broken or flawed processes are a major reason for data mess



**10-20x**

cost of treating/cleansing bad data if left unattended for a long time



**95%**

leaders sales & marketing leaders agree & confront to CRM data quality daily

Data Lake

- Poor quality data can cost **30% of business' revenue.**
- Bad Data costs the **US \$3T per year.**

# WHAT OUTCOMES WE DELIVER

**200%**



increase in CRM data coverage for a top financial services firm

**30,000+**



Data inconsistencies eliminated for a global investment bank and strategic consultant

**10+ Yrs**



Trusted relationship in delivering effective data driven marketing and sales acceleration solutions for a leading publishing house

**95%+**



Client retention rate over the last 10+ years

**4x faster**



Reach out to decision makers for a leading data intelligence and marketing advisory firm

**70%+**



of our revenues come from Outcomes-based models

**300%**



Increase sales prospecting efficiency for a leading mass media agency

**>\$5mn**



sales conversions delivered to a leading US-based B2B agency over 2 years.

**Improving business outcomes with high quality business data**

# BUSINESSES HAVE THE DATA. NOW IT'S TIME TO ACTIVATE IT



**Incomplete Records**

Missing contact details, incomplete mailing addresses or annual revenue figures



**Expired Data**

Contacts who have left organisation, company addresses which have changed



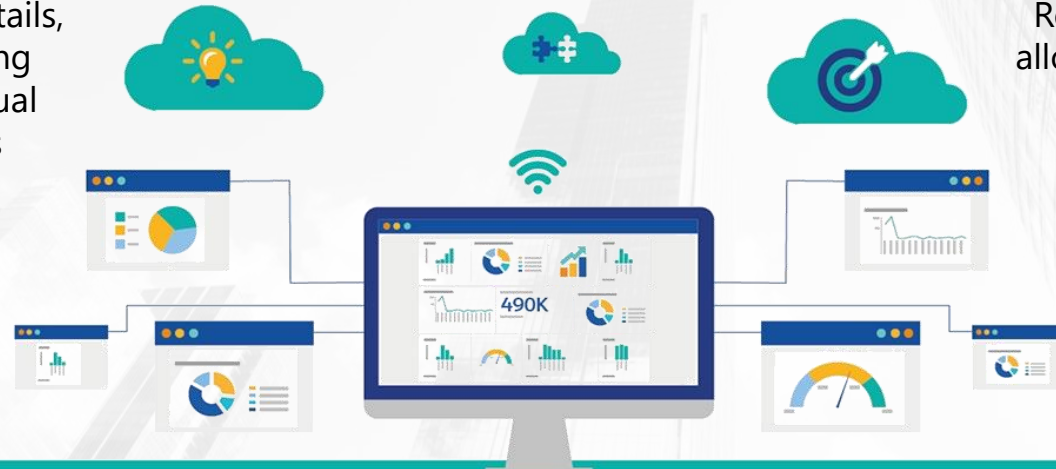
**Unclassified Data**

Records which are not allocated to a campaign, a source, owner or category




**Duplication**

More than one record for same person or same company



We work for your data so the data works for you – keeping your CRM systems accurate and updated – real-time!



**Non-Standardised Data**

Unformatted data with differences company names, phone numbers, addresses, etc.

**Make sense of the CHAOS!**



# CASE STUDY - 'CRM DATA MAINTENANCE' FOR A TOP TIER INVESTMENT BANK



**Client-** A global investment bank and strategic advisor

## Challenge-

- Cleanse & refresh CRM data.
- Manage growing volume of data from multiple & disparate sources.
- Eliminate redundancies, consolidate legacy data.
- Real time updates on Salesforce CRM to enable intelligence & decision making
- Standardize & attain single view of customer records



Data Hygiene project for cleansing **200K** customer records.



DIRTY DATA

- Quick diagnosis
- Recommended new titles & designations
- Merged, converted multiple formats & appended vital contact details like phone & validated email IDs
- Contacts classified against relevant industry sectors

Recommendations

Sampling Project



Delivered unique customer records with **100% Accuracy**

Awarded global CRM Maintenance project

Trusted Data Partner



CRM

Team Set-Up

- 10+ dedicated FTEs model
- Strenuous quality check system & process changes introduced to further enhance data accuracy



Eliminated **5,000+** duplicate companies and **20,000+** duplicate contacts

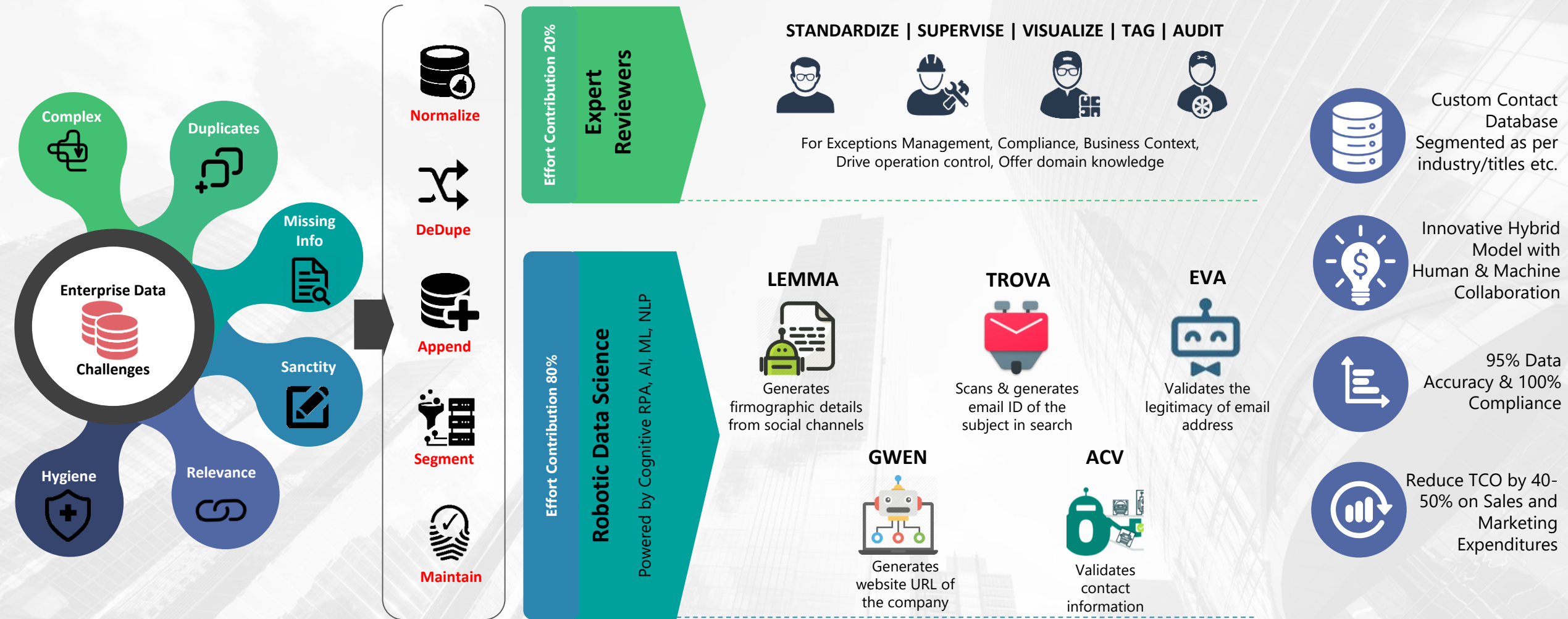


Increased database accuracy by **90%**



Data Maintenance cost Down by **60%**

# HYBRID DATA CLEANSING MODEL... TO SANITIZE AND MONETIZE YOUR DATA



*A Hybrid Delivery model comprising of 80% Digital Labor and 20% Experts Reviewers needed to deliver data productivity improvements & accelerate revenues for global businesses*

# CREATE A SOLID DATA FOUNDATION AND ACHIEVE ADVANCED ACTIVATION

## OUR DATA SOLUTIONS



**Build/List Research:**  
Segmented Database  
Industry/Persona  
Global reach profiling



**BeSpoke Database:**  
CxO Identification  
Account Profiling  
Data Creation &  
Consolidation



**Data Quality:**  
Cleansing & Enrichment  
Validation & Maintenance  
Deduplication &  
Segmentation  
Master Data Management  
Data Append & Analysis



**CRM Management:**  
Cleansing  
Appending services  
Dashboards



**Data Analysis:**  
Mission – critical  
identification patterns  
Infinite automation  
bandwidth



**Data Innovation:**  
Robotics, AL, ML  
Automated data  
profiling, cleansing,  
validation & enrichment



**Empowering Businesses. Delivering Performance.**



# DRIVING B2B GROWTH



**“By leveraging quality data, marketers can deliver highly personalized experiences at scale and, ultimately, accelerate the buying journey for rapid revenue growth.”**

# WHY DATAMATICS??

01



## Cost Arbitrage

- 30-40% Cost optimization in a hybrid environment
- Leverage AI, ML, RPA & Cloud for further optimization and transformation

02



## Privacy & Compliance

- GDPR Compliant Operations
- ISO 27001:2013
- SOC 1 Type Attestation Standards SSAE 18
- ISO 9001:2015
- High data security

03



## Turn Around Time/Speed

- Follow the sun model
- Domain experts ensure quick delivery and high accuracy
- SLA based delivery

04



## Unique Differentiators

- Scalable and flexible operations to match volumes
- Solutions tailored to client needs
- Comprehensive services for the investment banking lifecycle
- Flexible pricing model

05



## Domain & Experience

- Use of latest platform & software knowhow
- 37 years in business
- Strategic partner to fortune clients
- Access to competitive intelligence and best of financial experts





# THANK YOU

