



Case Study



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Advantage West Midlands required the merging of five CRMs into a single business index for the region

The Brief

The regionalisation of the business support and economic development in the West Midlands required that the 5 county based sub-regional CRM's need to be merged into a single CRM system. This required merging and matching data from 4 differing CRM systems into a single business index for the region. Additionally, it was important that all the in-depth transactional information regarding all businesses and contacts was migrated to the new structures and classifications to enable accurate reporting of historical interactions.

The Solution

Silverbear consultants worked closely with the customer to define the new regional schema and reference data structures. We then engaged with the 5 "donating" CRM owners to develop the data extraction processes. These data sets were then loaded into our integrated data cleansing solution to cleanse, transform, match and merge the data into a single index.

The key issues within this project were to maintain:

- Data Integrity across 5 overlapping CRM databases
- Data Quality
- Data Accuracy and alignment of products, services and reference data
- Transactional data both historical and live user journeys

A key task within the project was to then de-duplicate all the data and map it into a single, consistent data schema.

The Results

Advantage West Midlands now have a complete - and single - view of the whole region, which has enabled them to 'kick start' a regional delivery service. All customer details and history are now accessed - and are accessible - to all users of the single CRM. Advantage West Midlands is now able to track and profile its business clients and to communicate with them in the most effective and appropriate ways.

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Silverbear Membership Management Software solution is part of the portfolio of solutions from Silverbear Ltd. Employed within societies and membership organisations throughout the UK, Silverbear Membership Software helps organisations to build, define, examine, inform and communicate with existing and potential members.