

AQA CLIENT STORY



data8



CHALLENGES

AQA's growing database faced issues after moving from a homegrown CRM to Microsoft Dynamics CRM because the data wasn't cleansed beforehand. Duplicate records—sometimes showing multiple roles or locations for the same person—led to distrust in the system, with employees using their own spreadsheets. As a result, data was scattered, and the organization struggled to run targeted campaigns due to incomplete and poorly structured information.

SOLUTIONS

Data8 used a six-stage process to improve AQA's data quality. First, data from AQA's Microsoft Dynamics CRM was seamlessly transferred into Data8's cleansing portal (Input). The data was then structured and prepared for full cleansing (Improve). Next, it was verified and cleaned using Data8's technology, including checks against the TPS, CTPS, and MPS (Cleanse). Duplicate records were identified with fuzzy matching and custom rules (De-duplicate), then merged without losing key details, with record types created for individuals holding multiple roles (Merge). Finally, the cleansed and verified data was re-imported into the CRM over a weekend to avoid user disruption (Output).



AT A GLANCE

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Single view of each customer record, increased CRM user adoption, and the ability to run targeted marketing campaigns more easily.

RESULTS

Since Data8's custom cleansing and validation of AQA's database, several benefits have been realized, including a single view of each customer record, increased CRM user adoption, and the ability to run targeted marketing campaigns more easily. Email delivery rates have improved while bounce rates have decreased, and costs and time spent on invalid records were reduced through the removal of 100,000 records. Additionally, new roles were assigned based on rules, and revised governance processes were introduced.