

# INTEGRATING DATA WITH EASE

CARTER JONAS ENHANCES CLIENT INTELLIGENCE WITH DATACTICS

## Carter Jonas

Established over 160 years ago, **Carter Jonas** is the UK-headquartered property consultancy dedicated to balancing its distinguished history with the adoption of cutting-edge technology to ensure continued excellence in client service.

Carter Jonas has grown rapidly in recent years through natural expansion and a series of acquisitions which has brought challenges in the area of information integration, data improvement and de-duplication.



### CHALLENGE

**“Our mission for IT is to enable the integration of the businesses we’ve acquired, consolidate client intelligence from across the company and make it to available to all staff. In this way, we can identify appropriate cross-selling opportunities, continually improve client experience and ultimately strengthen client loyalty.”**

Tim Spencer, IT Director, Carter Jonas



### SOLUTION

#### Easy Data Integration

FlowDesigner makes it easy to quickly on-board data, in various formats and quality levels, from systems at newly acquired companies as well as a wide range of internal systems.

#### Unparalleled Data Accuracy

Using FlowDesigner, Carter Jonas created a rigorous automated onboarding, cleansing, deduplication and validation workflow to ensure that the data that fuels its CRM Microsoft Dynamics, is of the highest quality in terms of accuracy and completeness.

#### Continuous Data Quality

FlowDesigner ensures ongoing levels of data quality as opposed to a one-off consulting project where the quality of information decays rapidly.

#### Complete Data Transparency

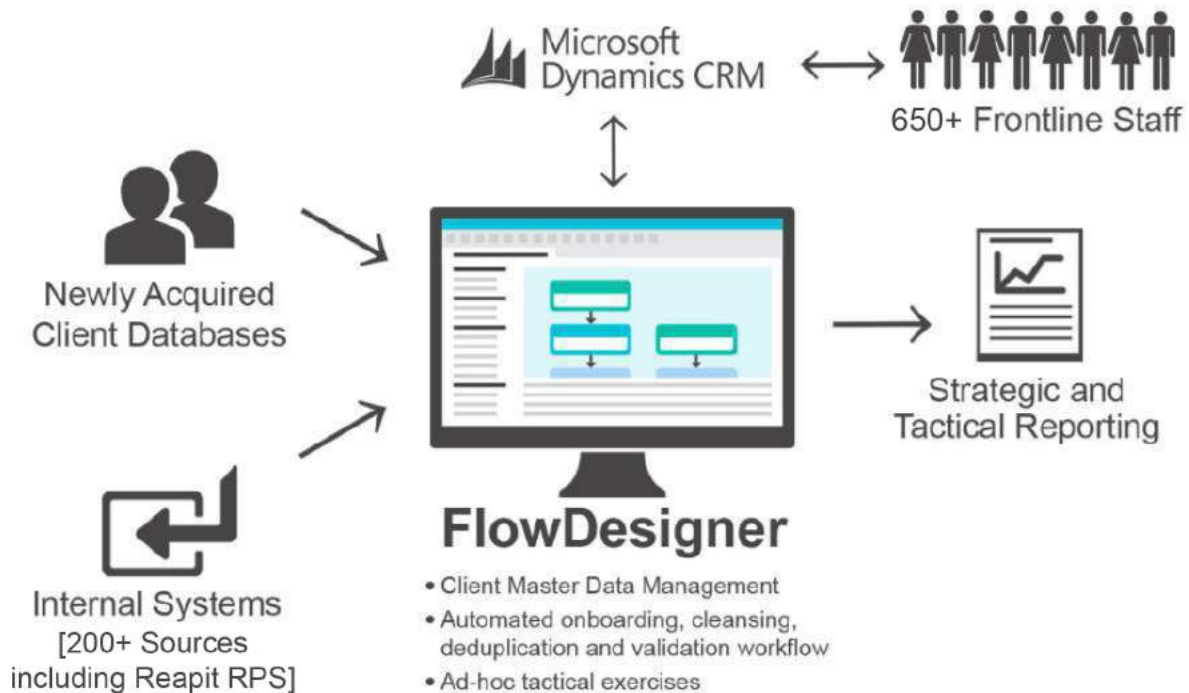
Carter Jonas can view the data at any given stage of the workflow so if there is a problem, they can quickly identify where it is happening and fix it there and then.

**“FlowDesigner seamlessly integrated with our CRM system, Microsoft Dynamics, to import new sources of client data. We make use of its matching capabilities to de-duplicate records and add new information which is a key challenge for us given our varied internal data sources.”**

Tim Spencer, IT Director, Carter Jonas

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“The result is that FlowDesigner helps us maintain a pristine enterprise-wide client database that we can rely on and is flexible enough to allow our business intelligence team to meet our evolving business needs.”

Michael Harris, Business Intelligence Analyst, Carter Jonas



## RESULTS

### Faster Processing Speed

FlowDesigner reduced a 3day, 600+ step manual process using Excel into a 1hour fully automated, transparent workflow.

### Enterprise-wide Client Intelligence

650+ front-line staff members are armed with accurate, complete and timely client information and have the ability to access and contribute to the firm's consolidated client intelligence.

### Improved Client Experience and Increased Sales Revenues

derived from the ability to identify appropriate cross-selling and upselling opportunities and providing clients with a targeted, coordinated and professional service.

“FlowDesigner is a robust, intuitive yet flexible tool that can be used effectively by those with even the most basic data-handling experience.”

Michael Harris, Business Intelligence Analyst, Carter Jonas