



Data Integration and Reporting

Financial Services Company

Integrated data from internal applications (loan system, Google Analytics, Zendesk) into Microsoft Dynamics 365, to improve the marketing team's outreach and campaign effectiveness

Data integration for a financial services company

Situation

- A marketing automation technology initiative was launched to derive insights and target customers in the existing loan system (finPower), and address new customer queries online (Google Analytics and Zendesk)
- Partnered with the client to integrate data from internal applications (finPower, Google Analytics, Zendesk) to Microsoft Dynamics 365, to improve the marketing team's outreach and campaigns

Accordion Value Add

- Analyzed data structures of existing systems and finalized field mapping methodology to populate data in Dynamics 365
- Created entities in the target application (Dynamics 365) and maintained data quality and consistency
- Developed fully automated data pipelines in Azure to ingest data from finPOWER, Google Analytics and Zendesk to Dynamics 365
- Developed data resilience and reconciliation mechanisms within the pipelines to ensure failures/successes are notified
- Documented the process for future reference and to support future enhancements

Impact

- Integration of customer financial information with customer engagement data in Dynamics 365 enabled the marketing team to develop a detailed customer segmentation analysis
- Cross linkages across systems enabled the marketing team to create targeted campaigns and increase marketing ROI
- The marketing team was able to pitch their products according to customer needs

Application architecture & data cleansing

