Leading Finance Company Experiences 15% Reduction in Total Cost of Operations with One Innovation

Trantor made it possible!

1 Month
To customize, test and deliver a CRM solution

4 million records
100 concurrent users

15% decrease in total cost of operations

The Client

The client is one of the largest, non-bank alternative capital provider to small and medium businesses (SMB) in the United States.

Client's CRM system had a database of over 4 million records and supported more than 100 concurrent users. The CRM system was using a conventional tool for data update. Client wanted to automate the data input process, while at the same time avoid the cost of generic package customizations and keep up with the business changes after going live.

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"The ease and simplicity of the program and the way that the Trantor Team has continued to develop solutions around and integrated with our CRM is simply amazing."

Manager, Technology & IT

Objective

Bring in best breed CRM practices to be able to process 4 million records, and support 100 concurrent users.

Project Goals

- Customize existing legacy CRM to automate data import
- Put robust fraud detection feature in place

Business Matters

Client was able to meet SLAs, maintain up data hygiene, and improve operational efficiency. This brought about 15% reduction in cost of operations.

The Problem

The Client was looking to automate the data input process, support integration, and achieve higher efficiency for their currently unsalable CRM system.

- CRM was unable deliver any real results

- Data import had become extremely time-intensive, leading to performance issues

- Service-level objectives could no longer be met reliably, reducing productivity

The Trantor Approach

Having worked on various technology upgrades for the client, Trantor understood their business scenario and processes really well. Trantor began with putting a meticulous action plan, followed by identifying appropriate resources and putting a coordinated timeline in place.

What started out as a simple CRM upgrade ended up being one of the biggest drivers of operational efficiency for us.

The Solution

Using out of the box APIs, Trantor team built:

- Robust data update utility feature within the CRM, making batch data import into the CRM possible. Now the client could run 3.5+ million records seamlessly, and in a fraction of the time taken earlier.

- Fraud detection feature to run within the CRM, simplifying operations significantly.

- Mobile site for the CRM, making it easier for sales representatives on the move to input data

The Benefits

- 10x improvement in data import

- Up to 60% acceleration in user response times

- 30% improvement in lead management process

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About Trantor

Trantor delivers innovative technology solutions, which enable our clients to achieve their business objectives at reduced cost. With expertise in both Cloud-based and traditional applications, we understand all aspects and challenges of software development from product and feature definition to core product development and QA, deployment, and ongoing maintenance. Our deep experience in fintech, ecommerce, captive centers, and custom software development is unparalleled.

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