

Private Equity Firm Achieves Unified Customer View & Near Real-Time Insights

CASE STUDY

Industry

Financial Services

Company Size

2000+ employees

Specialities

- Private Equity
- Investments
- Asset Mgmt

Tech Stack

- Salesforce

About The Organization

This multinational private equity, alternative asset management and financial services firm has over \$15 billion in assets.

Problem

This organization faced significant challenges in obtaining a complete view of their customer data across multiple Salesforce environments. Each Salesforce instance operated as a data silo, ensuring the necessary CRM data security but severely limiting the firm's ability to achieve a holistic, 360-degree view of their customers. To overcome these limitations, the firm needed a near-real-time integration solution to feed a data warehouse and facilitate seamless data flow from each Salesforce environment to multiple downstream systems.

Solutions

- CapStorm delivered data replication within just 3-5 minutes of changes occurring in each live Salesforce production environment.
- The firm was able to utilize CopyStorm to extract and import data seamlessly into its global data warehouse.
- With CapStorm's solution, the firm could perform cross-system reporting and cross-environment queries.

Results

- CapStorm's incremental Salesforce data extracts provided up-to-date data for executive decision making, ensuring leaders have the latest information at their fingertips.
- The firm was able to maintain data integrity and relevance due to CapStorm's schema replication capabilities, which automatically updated the data set when changes were made.
- The firm achieved a global, near-real-time 360-degree view of their customers, enabling more comprehensive insights and better strategic planning.

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