

# Data migration to a new CRM at an energy company

## Business challenges

One of the biggest challenges of a data migration is to ensure that the target environment is populated with high-quality data while also ensuring effective coordination and collaboration, all to a tightly controlled budget and timescale.

An Australian utility client of ours had legacy systems that had not been updated or maintained for a while. One of the objectives of the team was to implement a new CRM system across the business in order to have easy access to high-quality data, to improve operational efficiency within the business, as well as to improve the customer experience post migration. They needed to have more confidence and trust of data for better business decisions.

Utility project teams usually only have a short time to conduct a data migration. The targeted time frame to move data from the legacy systems to the new CRM system can be as short as six months. Project teams recognized various challenges at the beginning of the project, such as inconsistent data formats and unknown data quality levels.

## Engagement and solution

The Experian account management team collaborated with the data services and the pre-sales teams at an early stage to position our data management platform, Aperture Data Studio, aligned with the qualified use case. Experian conducted a proof of concept on data to highlight the need for a data quality tool. As part of the engagement, Experian produced a data quality report to highlight the issues with the client's customer data that will impact the success of the data migration to the new CRM.

The data quality report helped the client to make more informed decisions around how to best approach and prioritize the task of cleaning and migrating the data to the new system. Experian worked closely with the data migration project team to run profiling exercises around accurate decisioning, enabling quick insights on data quality. The data quality report helped the client to have a better understanding and confidence levels for the data migration process.

## Findings from a data quality report



**Addresses**  
Address validation data details



**Emails**  
Mailbox level checks indicate email validation data details



**Mobiles**  
Verified mobile data details



**National Change of Address**  
NCOA reference indicates how many accounts are to be removed



**Accounts Duplication**  
Provides the duplication of records found in the accounts database.



**Location Duplication**  
Provides the duplication of records found in the Location database

## Solution

Following this report, Experian conducted four weeks of on-site training for the key stakeholders to further demonstrate software, enable self-service usage of the platform, and provide recommendations for delivering data profiling, validation, and transformation processes required during the migration. Experian used a combination of software and services to remediate the issues identified with key data assets.

Experian's Aperture Data Studio provides all the functionality required to implement a complete pre-migration impact assessment. This risk-adverse strategy allows data migration teams to more accurately forecast, plan, and resource data migration projects while flagging high-risk obstacles, even before the project has commenced.

## Key benefits

By utilizing Aperture Data Studio for data migration projects, the client quickly identified data quality issues to move seamlessly to the new CRM system, and they will be able to:

- Ensure a smooth migration to the new CRM system
- Improve customer experience through cleaning data and having more efficient ways to communicate with its customers
- Ensure greater levels of confidence in decision-making
- Improve operational efficiency compared to traditional migration technologies
- Explore more revenue-generating opportunities, such as cross-selling through better customer insights
- Significantly reduce its time to market based on the enhanced effectiveness and ease of use of the new CRM system

Experian Aperture Data Studio plays a critical role in the data migration process by providing insight into data quality issues before and after data is moved into target systems, which could create a smoother, more successful migration process.

Data Studio helps de-risk data migration projects in terms of time, resources, and budget. Aperture Data Studio works to check that the data being migrated into the target system meets the business needs of the intended application, which in turn supports the ROI of the entire business project.

## Why Experian?

### Technology

Experian also brought on board the state-of-the-art technology, Aperture Data Studio, a modern solution that provides the connectivity, rapid loading, powerful profiling, workflow management, and easy prototyping to assist in a successful migration. Modern, collaborative design and innovative workflow capabilities allow it to scale rapidly based on the size of each data migration project.

### Data

Experian provides solutions, services, and unparalleled depth of data to help with data challenges. By leveraging these data sets, coupled with first- and second-party data, Experian helps generate insights and prioritize audiences that contribute towards our clients' customer growth and benefit ongoing customer engagement across all channels. Experian works closely with organizations in a wide range of industries globally, enabling them to make the right decisions from accurate and reliable data.

Tackle your next data migration with confidence.  
Our data quality experts can help.

[Let's talk](#)