



## Charter Global

# CASE STUDY – Federal Financial Client

### About the Client

The client is one of 12 Federal Reserve Banks that combined with the Board of Governors in Washington, D.C., and the Federal Open Market Committee (FOMC) are responsible for formulating and implementing monetary policy, which influences the availability and cost of money and credit in order to help promote national economic goals. They also provide payment services to financial institutions and the U.S. government, and supervise banking and other financial institutions.

### Project Goals

- Migrate client's existing MS Dynamics CRM data into an online instance that allows for local solution development compliant with their contracted support, National IT (NIT).
- Develop local client CRM solutions, meeting each client department's requirements in compliance with NIT EUS support.
- Integrate client CRM with Outlook email in compliance with NIT EUS support, and with their subscription webpage in order to store, manage, and update subscribers automatically.

## Key Challenges and Project Constraints

- Client's prior CRM contained a managed solution no longer supported by their contracted support, NIT. In order to locally develop or customize, client must migrate to a CRM instance with an unmanaged "Base" solution supported by NIT EUS.
- NIT EUS local user roles limited administrative and customization permissions.
- Current CRM data was out of date.
- The current subscription page needed a redesign parallel with CRM migration, development, and expansion.
- Subscriber lists were stored, updated, and sent through multiple processes and locations without any centralization or coordination.

## Project Description

- Migrated client's MS Dynamics CRM instance from the managed "Silver" solution to un-managed "Base" solution provided and supported by NIT EUS.
- Developed client solutions to allow for local customization and development in compliance with NIT EUS CRM district support roles. Allows for customized client CRM entities, plugins, and end user UI/UX.
- Integrated client CRM with Outlook email functionality per NIT EUS capabilities, and with subscription webpage by developing plugins, mailbox rules, and business rules necessary to automatically update contacts/ subscribers/ marketing lists.

## Results

- Client successfully migrated from On Premise to Online resulting in savings on Infrastructure maintenance.
- Migrated data after removing duplicates by Using Advance Tools and ML algorithms.
- Integration with client's external website (Portal) has helped to provide a single point of contact for any products and service updates.
- Consolidated and provided an enhanced Architecture for redundant entities.

## Why Charter Global

- Founded in 1994; Headquartered in Atlanta, GA with development centers in the U.S, India, and Serbia.
- Developed a portfolio of over 100 successful project implementations.
- Nearly 1000 full-time IT professionals support client projects.
- Established customer base of Fortune1000 industry leaders.
- Our experience spans pharmaceutical, manufacturing, telecom, finance, health care, media / entertainment, airlines, energy, retail and hospitality industries.
- Active database of nearly 2M consultants.
- Experienced Talent acquisition teams support client projects.

## About Charter Global

Charter Global drives innovation in IT projects and business operations by defining strategy and providing consulting, digital solutions, custom development, and skilled resources. With an established customer base of Fortune 1000 industry leaders and over 100 successful project implementations, our experience and proven methodologies enable our professionals to deliver industry leading solutions in cloud technologies, open source, DevOps, mobility, CRM, AI/ML, AWS, SAP, Microsoft & Pega BPM.