



# MasonBreese Data Migration

How to collate multiple data sources into one golden source database –  
efficiently and effectively with Alteryx

**A real life case study**

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# What was the project?

## Project scope

- A client had recently acquired several different companies
- Each of these companies had its own, locally customised version of a particular CRM software
- The client wanted a single source of data comprising of all the different CRM instances to give a clean, single view of the customer

## Additional challenges solved during the project

- Some of the CRM instances had overlapping information, so to just take the records and add them to a single database would have caused extensive duplication
- Several of the CRM instances had been extended to include information specific to the local entity; there were then data fields for a single company that did not exist in a standardised instance of the CRM software. It was essential that this data was not overlooked



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# Why did we use Alteryx?

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We chose Alteryx to manage the multiple data extractions, cleansing, formatting, deduplication and final delivery to the target database. Alteryx allowed us native connections to multiple data sources, in this case multiple databases which sat behind each instance of the CRM software.

The data required matching on multiple different fields and would often be matching hundreds of thousands of rows of data at a time. To do this manually in a spreadsheet would have proved difficult due to the amount of computing resources required. Alteryx allows both reading from and writing to data sources, including an extremely wide

range of databases using almost all or not all commercial connection protocols. On this project matches, which were at or over the matching threshold could be written to the golden source database, whilst the exceptions were exported to a smaller, more manageable flat file for client review. For the less bespoke instances of the CRM

software, filepaths to the database could easily be changed in order to simply 'plug in' a new database connection and run the workflows and produce instant results.

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# Our achievements, the client's benefits

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## Data management

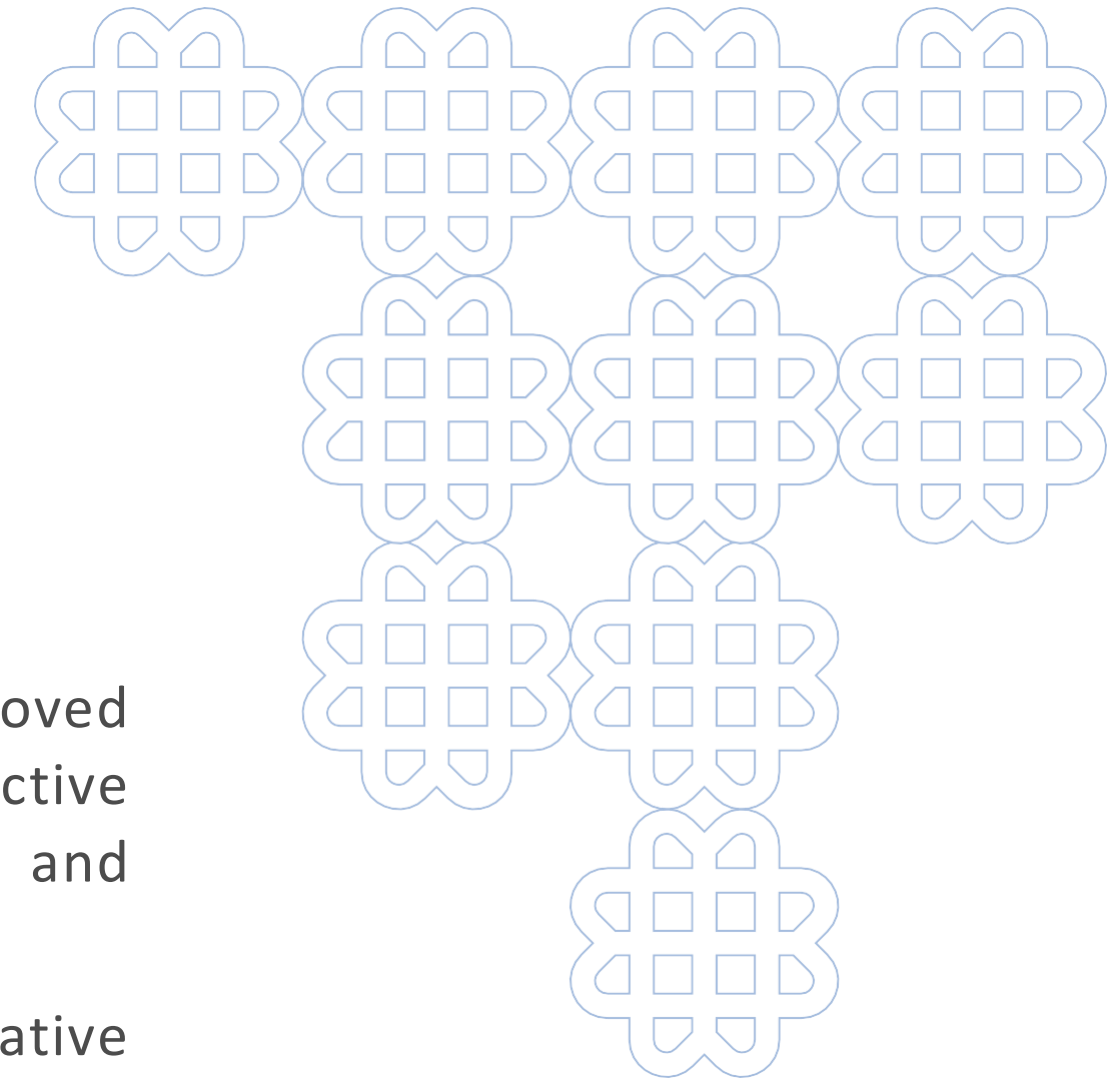
- Collating all CRM instances into one golden source: providing a consolidated single repository of client data, cleansed, de-duplicated and accurate
- Producing easily digestible reports for client review and instruction
- Adding unique data points catalogued to final dataset

## Data Automation

- Existing workflows can be used as templates should more instances require migrating in the future
- A list of remediation items – available to be worked on when capacity is available
- GDPR compliance – and associated audit trail

## People/Employees

- A range of improved outcomes from predictive analytics, cross selling and better customer service
- An accessible and informative single view of the customer



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# Small investments delivering big gains

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## Client investment

- Investment for one Digital Consultant and one Business Analyst
- Additional: Alteryx licence

## Return on investment

- 75% project cost reduction for data migration compared to conventional approach without Alteryx
- ¼ of consultants needed compared to conducting the migration with a traditional approach

### **Stakeholders benefiting** from the project:

- Sales Team
- Operations Team
- Marketing Department
- Client relationship managers
- All employees who used client data at any point

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# Are there benefits for me and my business by partnering with MasonBreese?

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## **Absolutely**

We will get the job done, tailored to your specifications.

From small to large scale projects, our MB Digital team will work with you to shape a digital solution that works for you in your organisation.

Innovation is evolving rapidly so we ensure all our digital consultants and project managers are fully accredited to use a number of processes and data automation tools, such as Alteryx and UiPath, whilst embracing all new digital technology.

## **Additionally**

It is about the work that needs to be done in a cost-efficient and professional manner, and our approach is about working with you and your people.

We love to inspire, innovate and develop, whilst sharing our expertise and the innovative ideas that our team produce throughout our projects.

We put a strong focus on collaboration with both you and your people, allowing us to bring your goals into reality in a way that is sensitive to your culture and situation.

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## **MasonBreese – Alteryx data migration into one golden source database**

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# Get in touch to learn more

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[www.masonbreese.com](http://www.masonbreese.com)

01534 761 461

[hello@masonbreese.com](mailto:hello@masonbreese.com)

24 Hill Street, St Helier

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