

Cleaning & Maintaining CRM Databases

New Company: Corp/Service Provider

Company Information

* Company Name Parent Company

Company Type Ownership

Service Provider DW Relationship Manager

Website Industry 1

Main Phone Industry 2

Primary Contact Industry 3

Secondary Contact Revenue (\$ In millions)

Number of Employees EBITDA (\$ In millions)

Pitches and Engagements > Project Clean

Buyer Lists

37 Items • Sorted by Buyer Name • Updated a few seconds ago

RECORD	BUYER NAME	CODE	ASSIGNED BANK	BUYER TYPE	PARENT COMPANY	BUYER STATUS	BUYER MILEST...
1	001862	2		PE-backed Strategic		Do Not Contact	Received SFS
2	001931	1		Strategic		Active	Received CA
3	002586	5		PE-backed Strategic		Active	Received CIM
4	002984	5				Pending	
5	002587	1		PE-backed Strategic		Active	
6	001863	2		PE-backed Strategic		Active	Received SFS
7	001866	1		Strategic		Inactive	Received SFS
8	001847	1		Strategic		Active	Received SFS
9	001848	1		Strategic		Inactive	Received SFS
10	001864	2		Strategic		Inactive	Received CIM
11	001849	5		Strategic		Active	Received SFS
12	001869	91		Strategic		Do Not Contact	
13	001850	1		Strategic		Inactive	Received CIM
14	001851	1		Strategic		Inactive	Received CIM
15	001852	1		Strategic		Inactive	Received SFS

Request and Guidelines Provided

- To update the client database, which helps them keep track on deal progress
- To help strengthen relationships with corporate clients and institutional investors

Methodology and Final Deliverable

- The information updated in the CRM are:
 - Deal related information which includes Buyers/Target list
 - Company's information
 - Individual contact information
- Consolidate data at one place which allows the client to contact relevant companies/contacts
- Some of the companies are linked to buyers/target list for a particular pitch and engagements, and the rest are added as contacts for future reference

Helped the client update, clean, and maintain the CRM database