Velosio

New Street Research:
Optimized Client Tracking and Management

The Challenge

Client Targeting and Reporting: Research analysts at New Street Research are in charge of maintaining their own client bases, and notifying them via email newsletters when important industry information is released. A typical newsletter could contain hundreds of HTML links to articles, reports and other information. When this London-based company set up its U.S. research group, new users wanted to leverage current CRM technology to implement a state-of-the-art approach.

■ Manual research distribution provided no way to track results or provide metrics

■ Legacy CRM system made it difficult to search, build lists or target information to specific clients' interests

■ Compliance with U.S. anti-SPAM laws was a must

Client Overview

new|street
RESEARCH

New Street Research is the premiere independent research boutique focused on the Telecommunications and Technology sectors globally. They partner with the world's leading investment institutions to bring them unique insights and ideas that will guide their investment decisions.

New Street Research was established in 2003 with a focus on the Communications Services Sector (Telecommunications, Cable, Satellite and Telecommunications Infrastructure companies) and Technology Infrastructure (IT Hardware, Semiconductor, Semiconductor Capital Equipment and Communications Equipment companies).

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The Solution

System Automation & Database Development: Based on the results of an initial assessment and investigation into New Street's pain points, Velosio implemented a guided trial of an automated, web-based solution. Project implementation went smoothly as the Velosio project team skillfully navigated the time and geographical challenges of working with stakeholders located in the U.K. and the United States.

Velosio Provided:

- Professional analytical services
- Customized implementation of Microsoft Dynamics 365 for Sales
- Implementation of ClickDimensions, an email marketing and marketing automation system for Microsoft Dynamics 365 for Sales
- Technical support: migrating data from the legacy CRM system, transferring Microsoft Outlook contacts into ClickDimensions and building reports

The Results

- **Improved customer database**—New CRM system allows New Street Research to capture important information about their clients, such as the sectors and research topics they are most interested in reading about

- **Audience segmentation**—Analysts can quickly pull together targeted distribution lists, further segmented by clients and prospects
- **Improved metrics**—Implemented solutions capture important metrics, including number of opens, forwards and clicks (especially hyperlinks)
- **Reduced risk**—Email distribution is fully compliant with U.S. anti-SPAM laws

Working with Velosio

"An updated CRM system and a new, automated email distribution system gave this financial research company faster and more targeted approach to sending clients the types of information they want to receive. The Velosio solution saves New Street Research analysts a lot of time and provides a whole new level of insight into their business."

Ready to grow your business?

Call 888.725.2555 or email: info@velosio.com and start a discussion with a business technology expert.

Velosio is a new leader in cloud, that simplifies *your* journey to NEXT. We guide you, deploying best-fit business applications that keep you ahead of the competition in today's digital-first business environment. We balance visionary ideas with pragmatism, delivering an exceptional client experience that drives business value faster. **www.velosio.com**

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