



Driving Customer Engagement at Scale in Financial Services



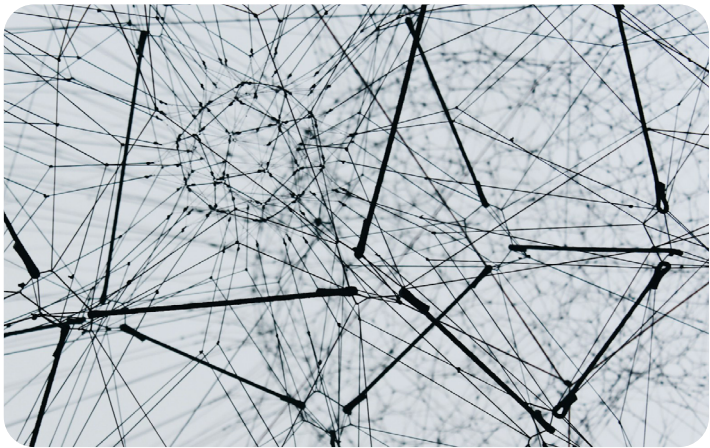
10M+ customer records ingested and unified into Golden Records



Millions of duplicate and erroneous records eliminated for cost savings



Real-time personalization powered across Adobe Experience Platform



Client

A global investment management company with billions of dollars in assets under management, serving millions of investors worldwide — including individuals, financial advisors, retirement plans, and government institutions. Their offerings include hundreds of mutual funds and ETFs across diverse asset classes.

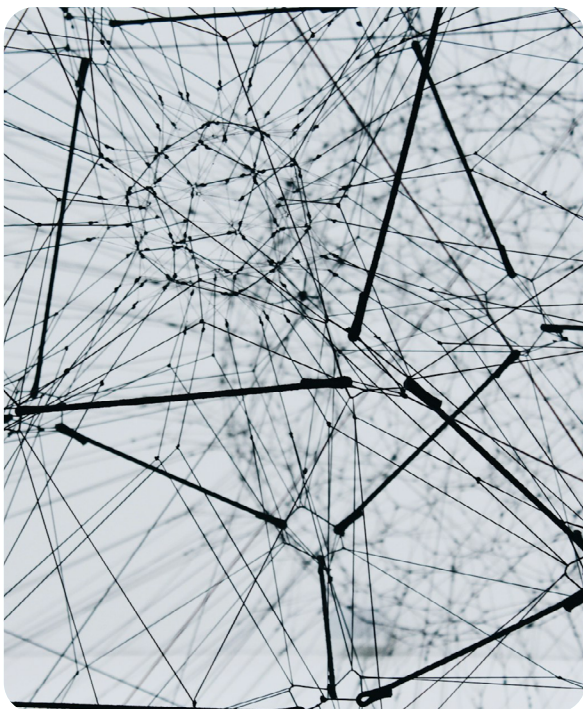
Challenges

With no such thing as a “typical customer,” the firm needed to keep pace with constantly shifting investor needs, preferences, and life changes — from saving for college to retirement planning. At the same time, they faced growing regulatory pressures on how customer data can be collected, shared, and used.

KEY PAIN POINTS INCLUDED:

- Siloed data systems preventing a unified customer view.
- Multiple accounts per customer across different product lines, making consistent engagement difficult.
- Complex and evolving compliance requirements around data usage.

To better understand and serve their customers, the company needed a Golden Record — a single, unified view of each customer across channels.



Solution

Partnering with Munvo and [Redpoint](#), the global investment management company implemented the Redpoint Data Readiness Hub, supported by Munvo’s consultative and technical expertise.

Together, we enabled the client to:

- Ingest and process more than **10 million customer records**.
- **Eliminate millions of duplicate and erroneous records** through advanced identity resolution.
- Build a continuously **updated Golden Record for each customer**, refreshed in real time as new data entered the system.
- Seamlessly **integrate the Golden Record with Adobe Experience Platform**, powering personalized omnichannel journey orchestration.

Benefits

The transformation delivered immediate and long-term value for the client:

- **Data Confidence:** A single, trusted Golden Record ensures accuracy and reliability across millions of customer profiles.
- **Compliance Agility:** Flexible identity resolution adapts quickly to evolving regulatory requirements, reducing risk.
- **Customer-Centric Engagement:** Personalized offers and services strengthen acquisition, retention, and loyalty strategies.
- **Operational Efficiency:** Cleansed and normalized data reduced manual clean-up and campaign inefficiencies.



Results

- ✓ 10M+ customer records ingested and unified into Golden Records
- ✓ Millions of duplicate and erroneous records eliminated, cutting costs and improving accuracy
- ✓ Real-time personalization delivered through Adobe Experience Platform
- ✓ Faster customer recognition across channels, enabling timely and relevant engagement
- ✓ Enterprise-wide access to unified data for scalable customer experience initiatives



By having a Golden Record, Redpoint and Munvo enable the client to serve more relevant content to the right person at the right time much more cost-effectively. Customers targeted with relevant messaging are more likely to invest, to stay with the company, and to choose additional services. The Redpoint Golden Record is integral to both acquisition and retention strategies.

— Alexis Romero, Vice President, Data & Analytics, Munvo



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