



Autus
Data Services

Validata

Focussing your business
on the right people

Background

The Financial Services market is complex and fluid with elements of it joining, leaving or changing firm every day.

- *Who is responsible for identifying these changes and updating your CRM system?*
- *How effectively is it being done?*
- *Would you like it done more efficiently and cost effectively?*

Validata has been developed specifically to keep the data of your FCA Registered firms and individuals accurate, thereby maximising your distribution effectiveness.



How it works

We receive data from your CRM system, run it through our unique matching algorithms and compare it to our augmented FCA Register Database

Output files are produced identifying improvements that could be made, for example:

- *People that are no longer authorised*
- *People that have moved firm*
- *New firms*
- *New contacts*
- *Duplicate records*
- *Gap filling existing records*

Features

- *Compares your CRM data file to our augmented FCA Register database*
- *Identifies areas for improvement to existing data*
- *Option to add new accounts and contacts not currently in your system*
- *Compatible with most CRM systems*
- *Individually tailored update process*
- *Consultation support to implement and refine*



Benefits

- *Keep your Account Managers focussed on selling while knowing your data is well maintained*
- *Boost your sales and marketing effectiveness, providing tangible return on investment*
- *Extend your reach to new target intermediaries, creating brand new opportunities*
- *Make the updates you need and want whilst preserving your control of the system.*

Delivery

Secure file transfer.

Pricing

Dependent on data volumes and options taken.

For more information please email
contact@autusdataservices.co.uk