



Golden Record Management using Pimcore MDM

About the Client

The client is one of the leading global IT solution and service providers. It has provided software solutions for the continuous transition of the world of enterprise IT since 1987. The company helps global companies build true IT resilience for data, infrastructure, and systems, starting with platform migrations, cloud deployments, security, and governance.



Client Requirements

The client offers a line of software solutions to global clients. The company's sales reps work from different locations. But, they were facing data inconsistency and redundancy issues in their leads. The objective was to eliminate data inaccuracy and inconsistency and create a Golden Record, so that sales representatives can access up-to-date lead data in real-time.

Apart from that, the client wanted to minimize time-to-market for customer-facing teams, such as accelerating quote generation and boosting the overall operational efficiency.

Key challenges faced by the client include:

- Master data of different accounts and locations was residing in separate systems.
- Scattered and incomplete account information of clients was making it hard for sales reps to access the correct data.
- Difficulty in accurately tracking customer interactions was impacting sales performance and system reliability.
- Lack of data insights was leading to inefficiencies in sales, customer management, and business operations.
- The manual process was consuming lots of time in data merging and updates.

Happiest Minds' Solution

Happiest Minds collaborated with the client and suggested a robust MDM solution to solve the data inconsistency and inaccuracy issues. Pimcore MDM was implemented to maintain the golden record of account and location data through data ingestion. The solutions implemented have improved bulk data updates, role-based access controls, and provided read-only access for secure data management and extraction.

Types of Assets/ Technologies

- MDM
- D&B API Integration

Key Deliverables:

- Built a centralized data model consolidating all account and location data in a single, easily accessible golden record repository.
- Integrated Salesforce to access account and location data.
- Integrated Smarty API to automatically validate, correct, and standardize the data based on the latest postal data.
- Integrated with D&B API to automatically validate and enrich account data.
- Implemented a Duplicate Identification System that automatically detects and flags potential duplicate accounts during the lead creation process.
- Developed the Batch Merge and Auto Merge features to handle bulk data merging based on predefined business rules.

Value Delivered

- Accurate and up-to-date account and location master data.
- Eliminated data silos and improved data governance.
- Minimized manual errors and boosted operational efficiency.
- Improved decision-making based on the golden records of accounts.
- Streamlined lead-to-account conversion process.
- Enabled sales reps to create a more accurate sales pipeline.



Provide

360°

View of Each Account



More Accurate

SALES

Pipeline



Reduced

TTM

Significantly

About Happiest Minds Technologies

Happiest Minds Technologies Limited (BSE, NSE: HAPPSTMNDS) is an AI-led customer-first digital engineering and Mindful IT company. With a verticalized approach that spans from chip to cloud, Happiest Minds delivers secure and scalable solutions across product engineering, cybersecurity, analytics, and automation platforms powered by enterprise-ready Gen-AI capabilities. The company brings purpose and precision to every engagement, helping enterprises solve complex business challenges and fast-track their digital evolution across industry sectors such as Banking, Financial Services & Insurance (BFSI), EdTech, Healthcare & Life Sciences, Hi-Tech and Media & Entertainment, Industrial, Manufacturing, Energy & Utilities, and Retail, CPG & Logistics.

Happiest Minds' culture of innovation, trusted governance framework, and people-first philosophy have been widely acknowledged, with recognitions such as the Brandon Hall Group Awards for Excellence in Learning and Development, Top Workplaces 2025–USA, CNBC-TV18 India Risk Management Award 2025 and the 3AI ACME Awards 2025 for leadership in AI and analytics. Headquartered in Bengaluru, India, Happiest Minds operates with the mission of 'Happiest People . Happiest Customers', and has expanded its presence across the Americas, UK, Europe, Australia, the Middle East, Africa, and Asia.

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