

Fixing the Foundation: How Entity Linking Revived CRM Performance

THE CLIENT:

A multinational financial services firm operating in a regulated industry.

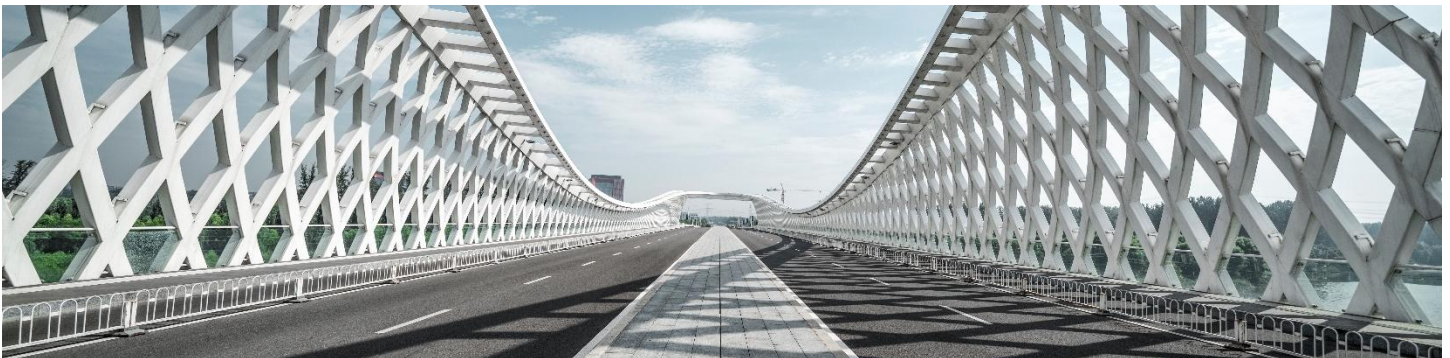
USERS:

Sales, Marketing, and Information Governance Teams.

CRM systems are expected to serve as a central source of truth, powering everything from client engagement to compliance reporting. But in reality, they're often riddled with incomplete records, inaccurate data and inconsistent hierarchies, turning what should be a strategic asset into a daily obstacle. For commercial teams, this leads to inefficient outreach, wasted time validating records, and missed opportunities. For risk and regulatory teams, it leads to delays in onboarding, gaps in reporting, and weakened internal controls.

And as AI becomes more embedded in commercial workflows, the cost of poor data rises. Automated prompts, summaries, and contact suggestions only work if the underlying records are accurate. Manual fixes like mandatory fields, junior staff reviews, or outsourced cleanups offer temporary relief, but without ongoing reconciliation and enrichment, data quality deteriorates and the opportunity to drive real value from AI slips away.

A global firm in a regulated industry experienced these exact challenges. Their CRM was fragmented and unreliable, eroding trust across sales and marketing teams. AI initiatives faltered due to perceptions and incorrect mappings, while downstream processes like billing and territory management suffered from poor visibility into organizational hierarchies. The firm knew they needed a more sustainable approach.



Pain Points

The firm's CRM was fragmented and unreliable, creating friction across every stage of commercial operations. Records were incomplete, hierarchies were unclear, and data confidence was low.

Key challenges included:

- **Low confidence in CRM data:** Incomplete or inaccurate records made it difficult to trust the system.
- **AI project underperformance:** Perceptions and misaligned outputs from AI tools were often traced back to incorrect or unlinked records.
- **Downstream disruption:** Billing errors, territory misalignment, and contract assignment issues were common due to unclear organizational hierarchies.
- **Manual workarounds:** The firm relied on one-time cleanup efforts, mandatory field requirements, and junior staff to manually review records — all of which were time-consuming and unsustainable.
- **Missed opportunities:** Without a clear view of firmographics, relationships, and financials, commercial teams struggled to prioritize outreach and personalize engagement.

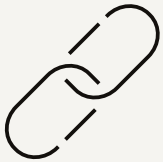
The firm tried to patch the problem with manual processes and outsourced reviews, but without continuous reconciliation, data quality quickly deteriorated. What they needed was a scalable, sustainable solution, one that could clean existing records and maintain integrity over time.

That's when they reached out to S&P Global Market Intelligence.

Without reliable entity links, CRM data became fragmented and untrustworthy, undermining sales execution, compliance, and AI adoption.

The Solution

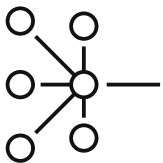
S&P Global Market Intelligence proposed a solution built around **Cross Reference Services** and **Kensho Link**, the most comprehensive mapping solution available today. This approach addressed both the immediate need for data cleanup and the long-term requirement for ongoing validation and enrichment. Within an hour, Kensho Link returned results for the firm's initial large batch of CRM records, allowing cleanup to begin immediately. With API integration in place, the firm was able to automate ongoing validation, streamlining data entry, reducing manual effort, and ensuring consistency across new records.



Clean and
Connect
CRM Records
Instantly

Kensho Link

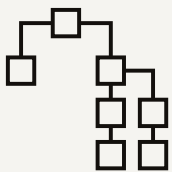
Kensho Link is a powerful entity resolution engine that uses advanced Machine Learning to match company names and attributes to S&P Global company IDs and global identifiers. It returns top matches with confidence scores and optional firmographic details like legal name, address, and URL. Users can upload large files via a browser or submit records through a REST API, with results delivered in seconds or hours depending on volume.



Map Entities
with
Confidence

BE CRS (Business Entity Cross Reference Service)

BE CRS enables firms to link 23 million entities to a single, trusted identifier, the S&P Capital IQ Company ID. It simplifies entity resolution by connecting standardized and proprietary identifiers such as LEI, CUSIP6, Ratings Org IDs, tax IDs, and many more. With automated linking capabilities, users gain deeper insight into complex company relationships and corporate trees, making it easier to onboard clients, manage investment restrictions, and maintain consistent data across internal systems.



Understand
Corporate
Hierarchies
at a Glance

Company Relationships

The Company Relationships dataset maps over 8 million global corporate linkages, including parent-child structures, ownership percentages, and relationship types. It enables users to identify the ultimate parent, understand control structures, and track changes over time with a Point-in-Time add-on.



Segment and
Target with
Precision

IS CRS (Industry Sector Cross Reference Service)

IS CRS provides extensive industry classification mapping at the company level, enabling consistent segmentation and screening across global datasets. It supports linkage to multiple frameworks, including GICS®, ICB, ETF Style Classification, S&P Global Ratings SIC, NAICS, and more. This multi-framework approach ensures that companies are accurately tagged across regions and regulatory environments, helping commercial teams target the right segments with confidence and precision.

Key Benefits

With entity-linked records and verified firmographics, the CRM became a reliable foundation for execution across commercial, risk, and operational teams. Data was no longer a liability; it became a strategic asset. The enriched CRM became a trusted foundation for commercial execution. Teams could now:

- Prioritize leads with confidence using verified firmographics and relationships.
- Personalize outreach based on financials and industry context.
- Eliminate manual cleanup and reduce reliance on junior staff.
- Power AI tools with accurate, linked records, improving prompt relevance and reducing hallucinations.
- Align billing, contracts, and territories with clear organizational hierarchies.

[Click here](#) to explore our
Cross Reference Services.

[Click here](#) to explore
our CRM Solutions

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