

# How Mondrian Investment Partners Made CRM Data the Foundation of Its Distribution Strategy

## About Mondrian

Mondrian Investment Partners is an independent, employee-owned investment management firm with offices in London, Philadelphia, Singapore, and Melbourne. Founded in 1990, Mondrian applies a disciplined, value-oriented investment philosophy across international and global equities, emerging market equities, and fixed income strategies.

The firm has built its reputation in the institutional market, serving corporations, pension plans, endowments, foundations, and high-net-worth investors across more than 250 client accounts globally. With over 150 professionals and roughly half the firm participating in employee ownership, Mondrian operates with a long-term orientation that extends to how it selects and manages its technology vendors.



## Challenges

As Mondrian began expanding its distribution focus toward the retail wealth channel, the firm's existing data and CRM workflows were not keeping pace. The team needed a solution that could support selective, on-demand access to advisor intelligence while keeping Salesforce clean and usable across the business.

- ◆ **Expanding Coverage Came at a Cost:** Their previous solution forced an all-or-nothing approach to CRM population. There was no way to push individual contacts into Salesforce on demand, so any coverage effort required bulk imports that drove up record counts and created ongoing hygiene work.
- ◆ **Manual Upkeep with No Scalable Fix:** Keeping CRM data current required unsustainable manual upkeep as distribution coverage expanded. The team needed an integration that could stay in sync without placing the burden on individual users.
- ◆ **A CRM That Had Outgrown Its Data Foundation:** Over 100,000 records had accumulated in Mondrian's Salesforce instance, most of which were unused. Cleaning and restructuring that data was a prerequisite to building any reliable workflow on top of it.
- ◆ **A Small Team Covering a Much Larger Market:** Mondrian's business was historically built on institutional relationships. Moving into retail wealth meant a fundamentally different coverage challenge: a lean team responsible for a much broader and more distributed advisor universe, with limited time to spend on prospecting manually.

# Why They Chose FINTRX

Mondrian came to FINTRX through a trusted referral, and what they found during due diligence matched the recommendation. Ryan Ginsberg's familiarity with Mondrian's environment, combined with FINTRX's integration capabilities and modern interface, made the transition straightforward.

## Results & Impact

Adding FINTRX did more than replace a data subscription. It became the foundation for a full overhaul of Mondrian's Salesforce environment. Working closely with the FINTRX integrations team, Mondrian cleaned up years of accumulated CRM debt and put a scalable, selective sync process in its place.

- ◆ **80,000 Records Removed:** Working with FINTRX's integrations team over several months, Mondrian was able to identify and remove more than 80,000 unused Salesforce records. As Dan noted about the onboarding experience, *"They were there to help make those matches, connect the data how it needed to be connected, and essentially clean up our entire Salesforce system."*
- ◆ **Selective Syncing Replaces Bulk Imports:** Mondrian's team can now push individual contacts into Salesforce on demand rather than loading entire segments in bulk. According to Bannon, *"the ability in FINTRX to click and migrate somebody and sync somebody into Salesforce is indispensable for our team. We use it all the time to get people moved into Salesforce and then start tracking our conversations with them."* That single workflow change eliminated the core data hygiene problem the team had been managing manually.
- ◆ **CRM Data That Flows to the Rest of the Business:** Because Salesforce functions as Mondrian's central data hub, records imported via FINTRX automatically propagate through Denodo, the firm's data virtualization layer, and out to other parts of the business. Clean inputs at the source mean clean data everywhere downstream.
- ◆ **AI Tools Helping a Lean Team Cover a Bigger Market:** As Mondrian shifts distribution attention toward the retail wealth channel, its small team is using FINTRX's AI features to prioritize outreach. According to Dan, their team is leveraging FINTRX AI to *"determine the best way to talk to different advisors, or finding advisors in a certain area that might be higher likelihood to convert into clients."*

*"Having the support from Jeremy and Ryan to get all of our data into a clean, usable format so that when we made that connection, we could hit the ground running, was fantastic...They were there to help make those matches, connect the data how it needed to be connected, and essentially clean up our entire Salesforce system."*



**Dan Bannon**

*Business Applications Analyst and  
Senior Associate, Client Services*

# About FINTRX



## AI-Powered Data Intelligence on RIAs, Broker-Dealers, Family Offices, Advisor Teams, and more

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