Modernizing Privacy Management with OneTrust for an Auto Refinance Leader

The Client

The Client is a leader in automotive loan refinancing. They partner with an extensive nationwide network of lenders to help customers secure better rates on their auto loans. Through their innovative platform, they streamline the refinancing process to lower monthly payments for borrowers.

The Challenge

The Client faced a complex data migration challenge as they sought to transition their privacy consent management from their CRM system to OneTrust's specialized platform. With over 2 million customer privacy consent records stored in their CRM, the migration was complicated by OneTrust's data ingestion limits.

The Client needed to ensure uninterrupted compliance with privacy regulations while maintaining data integrity throughout the transfer process. This required careful planning to handle the volume constraints while ensuring no customer consent data was lost or compromised during the migration.

The Solution

A comprehensive migration strategy was developed to systematically transfer the privacy consent data while working within OneTrust's platform limitations. The approach included:
Our comprehensive manual testing covers all 56 WCAG standard guidelines through three key areas:

- Developing a robust data mapping framework to ensure accurate translation of consent fields between systems.
- Creating a segmented migration process that broke down the 2 million records into manageable batches.
- Implementing automated validation checks to verify the accuracy of transferred data.
- Establishing a parallel running period where both systems were maintained to ensure continuity.
- Building custom scripts to handle the automated transfer while respecting platform limitations.

Value Delivered

The successful migration to OneTrust delivered significant benefits to the Client:

- **Enhanced Privacy Management:** The transition to OneTrust provided more sophisticated tools for managing customer consent preferences and privacy compliance.
- **Improved Operational Efficiency:** Centralized privacy management reduced the time and effort required to maintain compliance across different channels.

- **Better Visibility:** The dedicated platform offered improved reporting and tracking capabilities for privacy consent management.
- **Reduced Risk:** More robust privacy management tools helped minimize compliance risks and potential privacy violations.
- **Futureproofing:** The new system positioned the Client to handle better the evolving privacy regulations and growing data volumes.
- **Cost Optimization:** Leveraging a global delivery model reduced project costs by 60% while maintaining high-quality standards throughout the migration and ongoing management.

About Opteamix

Opteamix is an AI-powered technology services company specializing in AI, Application Development, Robotic Process Automation (RPA), DevOps, Enterprise Mobility, Test Automation, and Global Capability Center (GCC) operations. Guided by our higher purpose-**"Simplifying Success"**-we deliver transformative solutions that help organizations scale efficiently and thrive. Headquartered in Denver, Colorado, we operate a wholly owned delivery center in Bengaluru, India.