

Blockchain Technology Employed, CPCS Equipped a Bank to Securely Resell the Marketing Opportunities of Their CRM



/ Industry

Fintech, Marketing

/ Application

Salesforce customization, the CRM-system navigation and management automation, encoding end-user data with blockchain technology for external usage purposes.

/ Quick Fact

Automation of CRM processes allows your staff to concentrate on the important tasks that need a human factor, including such efforts as developing partnership programs.

🎯 Objective

Customize our Client's CRM-system and automate its processes, so that this international financial corporation with HQs in China could resell the marketing opportunities that their automated Salesforce processes may offer to their partners.

⚠️ Challenge

When an international financial corporation with HQs in China was growing their US business, their management reached out to CPCS with the request to customize their Salesforce CRM-system, automate their CRM processes, and encode the end-user database with the application of blockchain technology.

This was needed for an ambitious marketing project of our Client. The project aims to give partnership access to the Client's CRM-system. This is needed to equip the Client's US partners with an opportunity to use their database for varied marketing purposes. For instance, one of our tasks was to design a customized UI so that the CRM-system users (admins and the Client's partners) could:

- Use tags to send selection requests to the DB
- See the encrypted result of the selection
- Send messages to the group of selected and encrypted end users
- Have the ability to opt for sending their information only to a part of a selection

The main challenge of the project was to ensure the highest security of the Client's end-user personal data. Our software development engineers chose the blockchain technology to decode the database. We employed a data scientist to help us structure the database in order to get rid of irrelevant data for the purposes of this project.

/// Solution

Our solution equipped our Client's partners to benefit from the following logic of using

their CRM-system. An authorised partner can access the Client's Salesforce CRM-system, while the intuitive UI allows to quickly choose the tags relevant to a selection need. For instance, a simple usage of tags would allow to generate an instant multi-million list of 'users of age 26-35, middle level of income, located in XXX province, etc.'. Then the CRM-system shows the number of end users that fall into the selection category entered. Our customization efforts and integration with AWS allow the CRM admins to send automated marketing campaigns via mobile messages to the selected group of end users or to some percentage of it. Integrated Google Analytics service shows the KPIs of such campaigns.

Technology Choice

- Salesforce customization
- Blockchain technology
- Java, Python
- AWS
- Google Analytics

Team and Duration

- 2-3 backend programmers
- 1 fullstack programmers
- 1 Data scientist
- 1 DevOps
- 1 PM
- 1 QA
- 8-9 months for the MVP + ongoing support

✓ Results

We helped our Client to automate their CRM processes, customized their Salesforce solution and delivered a robust feature for their partnership campaigns.

The realization of the project that allows the Client's partners to benefit from the available end-user database involved the application of the blockchain technology to ensure the highest security standards. All in one, now our Client's CRM processes are fully automated and their customized Salesforce UI allows their partners to intuitively employ end-user data for varied marketing campaigns, the highest security protocols on.

/ About CPCS

From artificial neural networks to custom electronics design, highload and big data projects. CPCS is a team of 100+ senior-level dedicated engineers open to go through an in-depth feature-by-feature product discovery process with you. We believe you would also benefit from our client-first approach, transparency of all our magic, as well as fair and flexible rates.



hello@cpcs.team