



Puilaetco

Puilaetco Private Bankers is a Belgian private bank specialized in wealth management. Around 250 employees in 8 cities work to protect and grow their clients' assets. Puilaetco Private Bankers is part of the Quintet european private bankers group (KBL epb).

Business Solution	Sector	Collaborators	Website
Digital Marketing & CRM	Banking	250 +	www.puilaetco.be

CHALLENGE

The marketing department of Puilaetco Private Bankers wishes to have a focused and quality customer relationship. To achieve this goal, they regularly send e-mail communications like newsletters, organize events and send satisfaction surveys.

They faced three main issues:

- *the new European Data Protection Regulation (GDPR)*
- *the security of their database.*
- *the interconnection of tools*

Beyond the mentioned issues, the marketing department also wanted a tool that offers flexibility and ease of use.

Puilaetco needed a partner to put in place customized tools that meet their criteria and customized to the very specific needs of private banking.

SOLUTION

After analyzing the various solutions on the market, it appears that Odoo can provide all the necessary tools: sending e-mailing, event organization, CRM or Marketing Automation.

Odoo also meets the need for interconnection of tools: they are all on the same system and APIs can be set up to link customer databases for example. The durability and potential of the tool were also decisive. Eezee-it has put into place a consents tracking solution and a preference center to comply with the GDPR standards.

Eezee-it also accompanied PLDW for the implementation of Odoo in a global way. Finally, Eezee-It was able to meet their need for customization, both at the design level (newsletters, events) and at the application level (modification of a customer form, etc.).

RESULTS

Today, Puilaetco uses the tool that gives them autonomy and flexibility in their marketing campaigns. They organize about fifty events and send no less than 500 e-mailings a year.

They have the ambition to exploit and further customize the possibilities offered by the Odoo software with Eezee-It.

Sebastian Dupas

Project Manager

sebastian.dupas@eezee-it.com

+32 10 87 00 24



Modules

