



Quintet Private Bank

At KBL epb in Luxembourg, KBL European Private Bankers offers customized private banking services in asset management, asset structuring or transfer, and tax optimization. Diversified and experienced, the KBL team provides solutions that meet the individual needs of each client. They maintain relationships based on trust and shared long-term success with their clients.

Business Solution
Digital Marketing & CRM

Sector
Banking

Collaborators
250 +

Website
www.quintet.com

CHALLENGE

The marketing department of KBL Private Bankers wishes to have a focused and quality customer relationship. To achieve this goal, they regularly send newsletters and satisfaction surveys.

Before using Odoo, the KBL team faced three main challenges:

- *the security of their database.*
- *interconnection with Feddex via an API*
- *the new European Data Protection Regulation (GDPR)*

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

SOLUTION

After analyzing the various solutions on the market, it appears that Eezee 4 CRM & Marketing can meet

Eezee-it

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business booster



their needs. Eezee-It installed onsite the solution meeting the security requirements of the sector.

KBL was able to benefit from a customized version of Odoo by Eezee-It. On the one hand, for their satisfaction surveys; Eezee-it has developed an API to Feeddex, their historical partner.

On the other hand, Eezee-It has rolled out its GDPR solution with a preference center and extensive consent traceability.

RESULTS

Today, KBL daily uses Odoo, which allows them to send personalized e-mailings and satisfaction surveys using Feeddex. In addition, they are fully compliant with the GDPR standards.

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Modules

- CRM
- Email Marketing
- Events
- Website

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