

Banking Company –  
Wealth Management  
Data Protection

„Since using eperi, the customer increased the lead volume by 52% and raised the sales revenues by 34%.“

Customer  
Case Study



# Customer Case Study

## Banking Company – Wealth Management Data Protection



- CRM data tokenization incl. wealth management information
- eperi as enabler for banking cloud activities in Switzerland



- 52% Increase in lead volume
- 27% Boost in win rate
- 34% Rise in sales revenues

” Our regulator confirmed that, just by using the eperi Gateway, our CRM information is compliant in the cloud whilst using the complete framework of Salesforce account & opportunity management. “

### Customer

International Banking Enterprise based in Switzerland

### Problem

The customer is running **Salesforce Sales Cloud** for the wealth management area with all relevant opportunity, contact and account management processes. As wealth management is operating **globally**, they are facing **different requirements** from different countries. In some countries data needed to be tokenized, in others encrypted with specific algorithms, and in further countries a combination needed to be used to meet the banking regulators' requirement for **pseudonymization**.

### Solution

The eperi Gateway has been implemented as the **cloud data encryption and tokenization solution** for the client at all worldwide internet breakouts used.

The Gateway has been established as the **encryption/ tokenization** solution for all opportunity lifecycle-related management processes in Salesforce Sales Cloud. All relevant customer use cases **are supported** via the eperi Gateway **while the customer is able to define** which data to encrypt, tokenize or leave in plaintext depending on the respective legal requirement of the regulator.