

Global FinTech company achieves extraordinary revenue growth with Solitics.

About the company

A global FinTech company with multiple brands in multiple regulations, and millions of traders throughout the world. The company defined automation (i.e. transforming to fully automated customer engagement) as a prime enabler for further growth.

Success in a nutshell

Partnering with Solitics, the company has realised its vision of real-time, automated, hyper-personalised, omni-channel customer engagement, achieving:

43%

increase in sales

45%

increase in first time deposits (FTDs)

51%

increase in customer activity and LTV

65%

reduction in marketing time spent on setup tasks



Revenue uplift and lower churn:

The ability to communicate multi-channel personalized messages, based on real time events, directly translated into value for the traders, increasing retention and LTV.



Data, at your service:

Access and use of data used to be a major challenge (CRM, trading platform, sales records... all distributed and not in sync). They now use all their data to swiftly create new segments and engaging customer journeys.



Flexibility and Time-to-Market:

Given the unlimited access to data, company brands that operate using Solitics create new segments based on any data attributed and are able to swiftly connect new channels. The company is scaling and expanding its operation seamlessly and with ease.



Marketing independence:

Marketing teams work independently, building innovative customer journeys within the trading platform and are able to create insightful dashboards without depending on IT or R&D.



Analyze to optimise

Increased business transparency: Real-time reporting that spans across all channels.

Accurate attribution data enables to analyze and optimize every marketing effort.



The mission

Creating a new standard of customer engagement.

The company had 3 main goals:

Provide their Trading Brands an out-of-the box solution to create highly personalised customer communications on different channels. **01**

Increase engagement by delivering customised, live, Market updates in real-time, with the info that directly affects traders' activity and drives action. **02**

Seamlessly expand and scale the operation, while making it easy to comply with all applicable regulation requirements of the new brands. **03**

To achieve their goals, the company first needed to get access to all their data in one place.

Unfortunately, the company's CRM marketing system was holding them back. The system was rigid and required a cumbersome update process for each data change, making it incredibly difficult for the marketing team to use. On top of that, the CRM couldn't connect to external information feeds to receive price and event updates. The trading platform, where all users' activity happened, wasn't connected to the CRM either.



No flexibility. No speed. No personalisation, or value.

The FinTech company was ready to take action to end the infrastructure restraints and achieve what they really wanted: Manifesting their vision, empowered by a scalable marketing platform to make it happen. Their goals were personalisation, real-time, multi-channel marketing, vast value to the end trader. Free of IT department dependencies? Even better.

They needed a platform that could:



Align all trader's data, regardless of the communication channel or database.



Enable the marketing team to launch new campaigns and later, new brands, swiftly.



Use that data to generate content and live market updates, specifically tailored to each trader's unique set of interests and priorities.



Address the regulatory complexities and compliance requirements of multiple regulatory authorities.

At first, I didn't understand what Solitics brought to the table, believing it was just another marketing automation tool. Implementing and working with Solitics showed me what real time, data-driven, multi-channel customer engagement platforms should be all about. I strongly believe that there is no platform out there that can deliver even remotely comparable results

Global Head of Marketing Automation

Results

Solitics completed the integration of all of the company's data sources in less than 30 days (!), including connecting all their marketing channels, existing and new. In addition to being able to create segments and journeys, the team had access to real-time reporting of all campaigns and all channels, combined into a single view for clear analysis and optimisation.



The Marketing team ran their first campaign on the Solitics platform within a month!

From there, it only got better. With Solitics, the global FinTech company is now fully automating:

- New brands and campaigns with a minimal time-to-market
- Automated navigation through lifecycle-based journeys, from RND to FTDs and beyond.
- Sending live price-change updates on any type of asset, to traders with open positions on those assets
- Using triggers that simplify the compliance load, based on regulations from all applicable authorities.
- Hyper-personalised content, news, and analysis from third-party providers, such as Trading Central, Autochartist, TipRanks and others, based on traders' activity and interests.
- Attribution allocations and detailed reporting for further optimisation.



"I strongly believe that there is no platform out there that can deliver even remotely comparable results in terms of the bottom line, ease of operations and insights for continuous improvement."

Global Head of Marketing Automation