

# Custom CRM for a Financial Platform with an Integrated Data Management System to Support the Decision Making Process

An internal CRM system with integrated high-secured 3rd party web service that allows to consolidate and manage debtor's information, easily track all data updates and streamline the interactions between debt counsellors and debtors.



## About our partner

Our partner is a leading full-service credit management organization that has been operating in the efficient management of debtor risks for more than ten years. They include several platforms specializing in handling financial transactions between companies and consumers, and providing a complete overview of payment arrears or debt situation for consumers-debtors and debt counsellors.

**Industry:** Finance and Banking  
**Market:** The Netherlands  
**Years in business:** 10+  
**Type:** Web  
**Cooperation with HYS Enterprise:** 3 months  
**Team size:** 6 engineers  
**Engagement model:** Team extension

## About our partner's challenges

Within the company, debt counsellors provide documents and data concerning debtors. Once the file is submitted, it can be validated and enriched by a creditor. Then the debt counsellors have up to date data and can start a conversation with the creditor or send a payment offer.

Gathered data sets could vary from business unit to business unit. Without a centralized data management system, the information was inaccurate and could be missed easily. A huge amount of documents required a lot of time for processing and slowed down business workflow. Debt counsellors spend more time collecting and updating information instead of resolving payment issues or taking a new case.

## What our partner needed

The project required an internal system to gather data sets from various business units and make it non-repetitive, organized, and up-to-date.

The second hurdle to overcome was the integration with another similar platform. This integration had to provide a protected environment for efficient information exchange between debt counsellors and creditors.

## Solutions provided

- The advanced internal CRM system with a single database containing all the information from the various storages. A reflective merging data tool allows to check the financial status of company clients, collect and manage all data from different business units. Debt counsellors get more relevant data sets and can process the case faster and precisely.
- Implementation of a business logic part and integration with high-secured 3rd party web service using dynamic client certificates.
- Responsive Web UI for the internal system. Using the Mendix platform we were able to develop the interface with all required features in a short time.
- High-secured Integration Module embedded into internal CRM. It is supposed to improve communication between debt counsellors and creditors.
- Automated testing coverage that allowed us to develop and deploy the project without bugs.

## Methodology and technologies

**Methodology:** Agile / Scrum

**Technologies:**

- Mendix Modeller 7.23
- Java
- Hosting/infrastructure: Mendix Cloud

## Benefits delivered

A created CRM system eliminates the need for workarounds, enables to manage information about debtors, and generates accurate client cards for debt counsellors.

An Integration module with another platform improves communication between debt counsellors and creditors. It can boost the debtors base and level up the efficiency of the workflow.

To sum up, our collaboration resulted in an optimized platform that brings debt counsellors and the creditors together in an online environment.