



Customer Success Story

Daffodil enables a leading financial institution to leverage gamification in the CRM system to increase employee engagement and collaboration



Customer: A Leading Financial Institution

Country: Saudi Arabia

Industry: Banking

Our Role: Product Engineering

About the Client

The client is a leading financial institution based out of Saudi Arabia and has operations in several Middle East markets. Exhibiting an astute industry experience of 25+ years the client leads the corporate and investment banking practices for McKinsey and various other leading enterprises. The organization possesses in-depth expertise in major verticals of banking, public finance, and sovereign wealth management.

27%

increase in revenue

30%

faster development

7

gamification
features integrated

30%

reduction in
development cost





“We are very happy with the CRM system, the gamification feature has helped enhance the sales team’s performance. Good work daffodil.”

CTO

The Situation

The dated notion that only certain types of businesses require a CRM system has been busted by numerous market leaders in this age of instantaneous customer service. Today’s narrative suggests that If you’re working with people and have customers that rely on you for something, you need a CRM system.

Keeping the narrative in perspective, our client noticed the need for an effective CRM system for its sales team. However, they were facing challenges with regard to the adoption of a CRM system in the organization. Their sales team was a tad bit reluctant to use a technical system for their data monitoring, performance tracking and target analysis processes. The client wanted to build a CRM which makes their sales team more efficient while keeping them motivated and their morale high.

Another major issue they were facing was integration of CRM with their existing systems. While integrating the CRM with other systems could streamline data management, it could also become highly complex if two tools that weren’t built to work together were combined. They wanted to seamlessly integrate the CRM applications with their existing web application, which was a complex banking ERP system used throughout the organization.

Their basic requirement was to develop a cross-platform mobile CRM application. To solve the issue of reluctance in the adoption of new technology, they decided to integrate gamification with their CRM system as it would ensure both competition and collaboration in the sales team, which would further help in driving increased lead conversion and revenue. The aim was to integrate game mechanics that enable their sales executives to monitor and improve their sales activities comfortably.

The client wanted to integrate gamification techniques such as activity streams, contests, badges, points, prizes, awards, real-time leaderboards, progress bars, etc. to help promote CRM adoption within the organization.

In addition to that, the client wanted an automated system in place to help allocate accounts to their sales representatives while keeping track of their number of calls and visits, sales pipeline, target figures, etc. with the help of intuitive gamification.

The client got in touch with Daffodil Software to build an application with all the features mentioned above and integrate it with their existing ERP web application. Daffodil’s prior experience with the banking industry and expertise in CRM application development gave them the confidence to trust us with the complex project.

The key challenges that were presented to Daffodil were:

- To build a cross-platform CRM application with integrated gamification features and performance tracking system to elevate employee engagement while strengthening customer relationships.
- To solve the challenge related to data security while integrating and using the CRM system when dealing with sensitive financial data.
- To integrate the CRM application with the existing complex ERP application that the client uses for all business functions.
- To develop independent Android and iOS applications to track and review sales activities on a single platform that is accessible from anywhere.

The Solution

A cross-platform CRM application was developed and further integrated with gamification features to ensure employee engagement and increased usability. To strategically plan the gamification process, well-defined goals were identified for the sales representatives and corresponding rewards were set to award the goal-achievements. Our developers integrated a feature of awarding points to the sales representatives for every action performed and badges for accomplishing specific milestones such as sales closures. The accomplishment of specific tasks was to be rewarded with bonus points or higher levels of awards. Clear metrics were identified to track their progress.

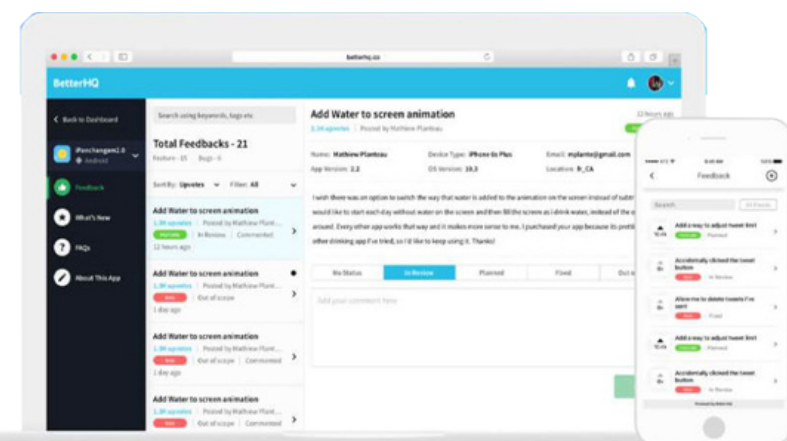
Numerous gamification features such as real-time contests, badges, points, prizes, real-time leaderboards, etc were intuitively blended with the overall UI/UX of the application which not only made it more user-friendly but also motivated the sales representative to improve their performance. Two separate applications were developed for Android as well as iOS devices for the sales representatives to use on the go.



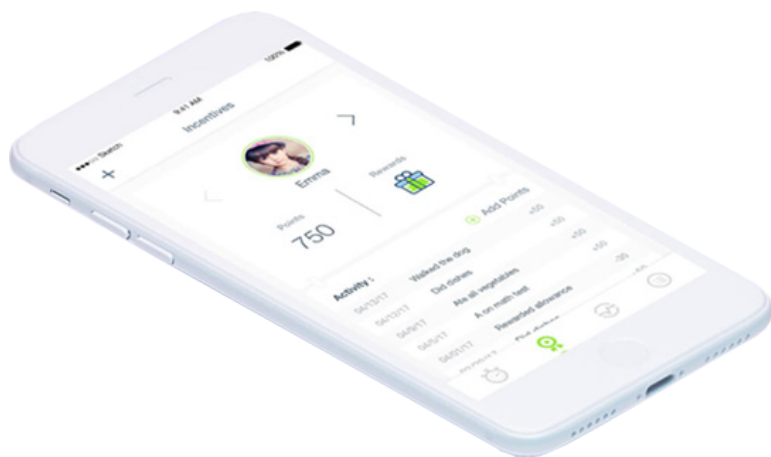
PhoneGap application framework was used to partially build native-like apps faster for Android and iOS as it makes them easily compatible with all platforms. The remaining code was written for the individual Android and iOS applications separately. This process of dividing the coding process through two different platforms reduced the time and cost of development by 30% without compromising on the code quality or performance of both the applications.

The solution was also integrated with a performance tracking module that simplified the process of assigning accounts to sales representatives resulting in easy management of accounts. It also provided the ability to plan calls and visits and their frequencies in addition to the feature of tracking and reviewing their sales pipeline and targets achieved. This helped the client make better decisions after thoroughly analyzing the various reports, KPIs and forecasts generated.

To deal with the challenges related to security our developers came up with yet another innovative solution. The CRM system offered granular, role-based permissions for security and access purposes. These roles could be set by the CRM administrator to ensure only specific parties can access certain pieces of information. Permissions could be applied to individuals or entire teams. Encrypted transmissions, data center backups, and session timeouts were few of the ways the CRM system ensured the security of data.



Agile methodology was used as a project management approach, resulting in better development and faster deployment. The applications were built to be seamless, scalable and fast-processing as our experienced developers ensured a clean code and use of modern technology. Our expert technical specialists leveraged the benefit of custom development of the CRM solution and seamlessly integrated the CRM solution with the organization's existing complex ERP application. This was done by meticulously examining the latter's code and building the CRM system in such a way that it can be easily integrated into the existing application.



A few additional features that were integrated into the application were:

Custom Leaderboards: The clients could monitor how each sales representative is performing with leaderboard stats updated in real-time. Each representative could add a custom leaderboard to their CRM dashboard and customize it to display actionable insights about each representative's closures, actions, calls, and targets.

Real-Time Data Updates: The representatives could set up custom alerts based on contact actions, lead scores, emails opened, links clicked, deal milestones and new appointments. This helped them reach out to their hottest leads at just the right time, and close more deals.

Advanced Reporting: The clients could mine their sales gamification process for actionable insights with advanced analytics, metrics, and reports. They could track revenue over time, compare sales tactics, conversion metrics, deal funnels, and customer lifecycles. Advanced reporting made it easy to get an insight into how gamification strategies and sales representative's performance affect their bottom line.

The Impact

Daffodil developed a single platform for the client to track and review its sales performance. The solution in addition to improving sales performance also helped the client make better business decisions with the help of data-backed reports, KPIs and forecasts. Gamification encouraged both competition and collaboration on their sales team, driving increased lead conversion and revenue. The real-time data generation of the sales rep's performance helped them compete and collaborate within the team resulting in higher revenues and happier customers. As a result, the total revenues of the organization went up by 27% after integrating the CRM solution. The seamless integration of the CRM system with the existing ERP led to a smooth transition in the technology adoption process. The native-like performance of both the applications (Android and iOS) ensured a seamless, user-friendly experience, further strengthening employee acceptance and motivation intensity.



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Technology Stack













- PhoneGap
- MySQL
- React
- HTML5

About Daffodil

Daffodil Software is a software engineering partner to 100+ organizations across the globe and has been helping them in making their software products more robust, teams more productive and processes more efficient. Our ability to look beyond technologies to deliver innovative solutions with scale and speed has been lauded by our clients as well as the tech community worldwide.

Since our inception, we have invested in organic growth; building on our engineering capabilities, organizational processes, and culture required to deliver a truly collaborative ecosystem for solving technology challenges. At the core of Daffodil lies a culture rooted in innovation, learning and a result-oriented mindset.

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