

## CRM launch in record time

### **Baloise Life (Liechtenstein) optimizes partner support with BSI CRM**

Baden, 29.06.2017 – **Baloise Life (Liechtenstein) AG puts its trust in BSI CRM for partner support. The CRM launch took place nearly exclusively in-house, which was largely attributable to the proximity to the standard, the individual configuration possibilities and experience with BSI CRM at the Baloise Group.**

Aiming to offer business partners a holistic support experience, Baloise Life (Lichtenstein) decided to introduce the CRM solution from BSI Business Systems Integration AG. “There was no dedicated CRM or partner management system in the past,” reflected Alain Wittwer, Baloise project manager. “What proved decisive for the choice of BSI CRM was its coverage of the requirements, the extensive independent operation by Baloise and the low costs for licenses, installation, configuration and operation,” Alain Wittwer added.

Staff receives a 360° view of our business partners with BSI CRM. This in turn enhances efficiency in the lead and sales process, while improving service quality.

#### **Record speed with the implementation**

In a one-day workshop, Baloise and BSI identified the objectives and scope of the CRM project. This resulted in the definition of two development phases: in phase 1, all requirements that could be realized in the standard software purely through configuration were implemented. The partner data was also migrated. Integration of the CTI, document management and the risk system are to be carried out in a second phase.

“The duration from the initial workshop to productive activation was around four months, with only around 18 days of work by the IT department. This was due, on the one hand, to the fact that there already was a productive version of BSI CRM running with Comet on the Baloise Switzerland server, and we therefore did not need to start from scratch. On the other we were able to tap into the sophisticated standard of BSI CRM and our experience within Baloise,” according to Alain Wittwer, who went on to add: “We will now gather experience in productive operation and look forward to then launching phase 2.”

### Transparent business relationships thanks to CRM

Through the CRM introduction, Baloise Life (Liechtenstein) anticipates a transparent depiction of business relationships for sales and the back office, comprehensive partner management from prospect to partner, a central partner view and uniform contact management including planning and history, as well as the creation and storing of documents pertaining to business relationships. “BSI CRM will also available be available to customer representatives in the future as a mobile solution, which supports operational and sales processes in both the office and while on the go,” explained Alain Wittwer.

### About Baloise Life (Lichtenstein) AG

Baloise Life (Liechtenstein) AG offers modern and secure life insurance policies that are distinguished by flexible benefits. Financial planning and wealth management are also among the core competencies of this Baloise Group subsidiary. [www.baloise-life.com](http://www.baloise-life.com)

### Contact

Claudia Gabler, +41 (0)31 850 12 13, [claudia.gabler@bsi-software.com](mailto:claudia.gabler@bsi-software.com)

Catherine B. Crowden, +41 (0)56 484 16 24, [catherine.crowden@bsi-software.com](mailto:catherine.crowden@bsi-software.com)

BSI Business Systems Integration AG  
Täferweg 1, CH-5405 Baden  
[www.bsi-software.com](http://www.bsi-software.com)

**We develop software at the interface to the customer.** BSI CRM, BSI’s core product, provides simple processes with a 360° view of sales, marketing and customer service. With BSI Contact Center, BSI PoS, BSI CTMS, as well as special solutions, we offer focused products for any industry or task. The use of open technology (Java/Eclipse) guarantees efficiency, individuality and future security. More than 120,000 users profit from our software daily in companies such as Actelion, AMAG, Baloise Insurance, Swiss Post, ERGO Direkt, Hermes, Lidl, Münchener Verein, PostFinance, Metzler Private Bank and Walbusch. Behind it stands the hard work of 235 engineers and project managers in Baar, Baden, Berne, Darmstadt, Dusseldorf, Munich and Zurich. And anywhere you need us to be.