

## BSI develops CRM for WIR Bank

### WIR Bank forges ahead with digitalization with BSI Banking

Baden, 19.10.2017 – **WIR Bank focuses on growth and digitalization. Within this context, the bank has chosen to work together with BSI Business Systems Integration AG. The goal is to acquire new customers, to strengthen the network and to boost competitiveness through automated processes.**

The software company BSI is pleased to gain another well-known customer from the banking world. Founded in 1934, WIR Bank is modernizing itself digitally. A fresh appearance, digital products and a new customer relationship management based on BSI CRM testifies to the commitment of the SME bank to provide even greater support to their customers. “We seek to serve our customers even better and more efficiently than before. The goal is to enable SMEs to conduct business more intensively within the WIR business network. Our new CRM solution from BSI shall provide us with the necessary information,” explained Claudio Gisler, Head of Product and Channel Management and Member of Management at WIR Bank cooperative. The bank would also like to focus on acquiring new customers. “We also need a system for this purpose, which supports us in the acquisition process and which helps us maintain ongoing contact,” according to the expert.

WIR Bank, which at the same time is also Switzerland’s largest SME network, has thus far not used a CRM solution. “There were aspects used for customer administration in the core banking system, but the majority of customer contacts occurred manually,” Claudio Gisler said looking back. Since the bank has decided to pursue a clear growth strategy and the network should grow accordingly, a CRM foundation must be created that makes it possible to establish connections, to easily make selections and to depict a 360° view. “We evaluated several solutions. We felt that we were understood by BSI. Besides the project team, the diversity and comprehensiveness of the bank-specific requirements, as well as the high degree of integration, are what convinced us,” explained Claudio Gisler.

With BSI Banking, WIR Bank is using BSI CRM industry solution that covers all areas of customer acquisition, customer service and marketing. The solution will be installed “on premise”, but also be available in the cloud. That provides security: “The uncertainty of the direction bank regulation will take in regard to the cloud in the banking field is too great. Therefore, we wanted to go with a system that is not exclusively available in the cloud, because the cloud is not yet so widespread in the

banking field. With this in mind, we are not painting ourselves into a corner with BSI Banking – a switch would be seamlessly possible at any given time,” the board member stated.

### **Facilitating valuable customer dialogue**

Customer relationship management is highly valued at WIR Bank, as Claudio Gisler underscored: “We do not seek to merely satisfy our customers, but to excite them.” He went on to describe the bank’s orientation: “To also achieve excitement in mass business, information for the customer representatives is key to beneficial customer experiences.” In contrast to the mass marketing of the past, in the future, customers shall be acquired through the right channel with the content that is relevant to them at the right time.

To obtain the maximum from the CRM solution for customers, BSI Banking is be used comprehensively across the bank from the customer reps, to the consultation center, by marketing and by behind the scenes teams such as the back office and compliance. A total of 200 employees shall work with the CRM solution. They will particularly profit from the simple, user-friendly interface and the clearly laid out 360° customer view. In marketing, WIR Bank aims for improvements and simplifications while conducting multilevel and addressee-targeted campaigns.

### **Goals of customer relationship management**

Claudio Gisler considers simplified, coordinated, automated and digital end-to-end processes to be among the most important goals of the CRM solution. Furthermore, WIR Bank is building the CRM so that it assists customers in generating more business by having the system making appropriate recommendations regarding potential customers and suppliers. “We seek to design standard processes as simply as possible in order to reduce costs and to be competitive in the market. With BSI Banking we are laying the foundation for data analyses, business intelligence and artificial intelligence – consistently with the focus on helping customers to generate more business and to boost profits.”

WIR Bank also has a lot more planned for the future, Claudio Gisler revealed: “Data analyses will help us to address customers in an even more targeted manner. We want to promote digitalization so that life becomes easier for our customers in the digital world,” the expert stated and concluded: “Digitalization is an essential strategic element for us. With BSI CRM we have established a good basis for furthering digitalization in the interest of our customers.”

Link: [www.wir.ch](http://www.wir.ch)

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**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 the industry solutions for banks, insurance companies, health insurance companies and retail as well as with BSI Contact Center, BSI PoS, BSI CTMS and 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 264 engineers and project managers in Baar, Baden, Berne, Darmstadt, Dusseldorf, Munich and Zurich. And anywhere you need us to be.