**THE MOST IMPORTANT DRIVER IS CUSTOMER SATISFACTION AND THEREBY CUSTOMER RETENTION.**

Cherry Crowden Co-owner Sundowner Guest House

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**BSI value no. 2**

**“WE LOVE OUR CUSTOMERS.”**

Our customers are our partners, like family, like our father or daughter. We only want the best for our customers, enjoy meeting with them, like to talk to them and often find ourselves thinking of them. Naturally, we don’t want to do anything to harm them, but sometimes we wish we would receive a bit of recognition, yet understand when we do receive criticism.

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"Touch down at New York JFK airport. Through the loudspeaker the pilot thanks us for flying with the company: “We know that when it comes to flying you have a choice. We would like to thank you for choosing American Airlines.” Luckily, I did enjoy my flight – otherwise the announcement would have just been more phony “marketing drivel”. Customers do have a choice today and hardly anyone decides to make the same mistake twice. What can we learn from that? First, if you still believe in the concept of loyalty, then buy a dog. Second, the product must be of sound quality – if the product doesn’t work, great packaging alone won’t do it. And finally, we must keep the company close to our customers and utilize the feedback we receive from them. In an unsteady environment, “…resiliency comes from marketing that listens and responds” – here I am citing our lead article by Cherry Crowden on how to embrace a customer relations philosophy, regardless of the size of the enterprise.

What we strive for at BSI is to program good software and to stay close to our customers. We urge our employees to visit our customers as often as needed to be able to understand their business and the way the end users work with our software, and also to try to stay in close communication, both online and offline. We have therefore redesigned our customer magazine to make it another “meeting” place. We hope you like it and greatly appreciate your feedback.

I wish you enjoyable reading.

Christian A. Rusche
M y claim to fame was the planning and setting up of the Swarovski Crystal Society (SCS) in 1987, which is a customer association dedicated to servicing and uniting collectors of Swarovski crystal around the world. But, personally, I think the best achievement in my whole career was introducing the concept of “Customer Relations” to Swarovski’s international organization. Twenty years ago, getting up “close and personal” to the consumer was an anathema to a manufacturing company that relied on their own sales companies to push the products through the distribution channels at a profit. It was not deemed important to find out who the end customer was and what their needs and wants were. It took many years of persuasion and continually proving the point to the sceptics before Customer Relationship Management was formally integrated into the Consumer Goods Division. The relationship with the member was developed, nurtured and maintained through communication with the company and direct contact at the Authorized Retailer, as well as special social events, where the members could interact with company staff and each other (the early signs of what was to become the “community” marketing phenomenon). These close encounters gave us the opportunity to develop a feedback-analysis system that turned information about the customer into knowledge for the development and adaptation of products and services.

Eventually, the corporate culture changed and the traditional product-oriented business model was turned on its head by placing the customer at the center of activities. 

First steps towards “one to one” marketing

The implementation of customer relationship marketing intensified alongside the commercialization of the Internet. This development allowed the company to have fast and cheap communication with hundreds and thousands of customers around the world. As well as being efficient, this new type of personal correspondence was surprisingly intimate. We, as innovative marketers, realized that “one to one” marketing – meaning building relationships one customer at a time – was the future, but we were desperately in need of technological support. The IT professionals worked on the mass customization of individual customer/member products, services and information, and the building of a global customer/membership database. It took many years of hard labor to develop a comprehensive, purpose-built Customer Relations Management (CRM) system. Smart marketers allow technology to create the customizing relationship with the customer.

When I left the Swarovski Corporation in 2000 to become an independent marketing consultant, I proudly held the position of Vice President Customer Relations, Consumer Goods Division, and the Swarovski Crystal Society could boast 450,000 loyal members in 28 countries around the world. The organization was supported by a sophisticated software system that could store each and every member’s details and history, but most importantly, on every country, dedicated Customer Relations managers – from branch marketing director to contact center staff – were in operation, keeping the customers close to the company and utilizing the valuable feedback mechanism.

From multinational corporation to small bed and breakfast start-up

It was a big leap to start up a new business in a new industry in a strange country on the other side of the world. But Michael Kohla, my life and business partner, and I were looking for an alternative lifestyle and the idea of running our own exclusive guest house in one of the most desirable tourist destinations on this planet was very enticing. We were soon swimming like fish in water, happily discovering similarities to our previous roles in the big, corporate world but reducing our marketing activities to a small, medium, micro enterprise scale. To ensure that the great customer experience we promised would be delivered, we took on multiple functions. As the guest house owners, we were not only responsible for the marketing strategy, customer communications, finance and administration, food & beverages, housekeeping – but also became the cook, concierge, barman, coffee barrister and gardener!

The customer value proposition

We did not want to be just another “B & B” in Camps Bay. Our aim was to establish a high-quality, customer-centric, home-away-from-home ambiance for overseas visitors. The guest house’s set up and serv-

Relationship marketing: a winner for large and small operations

PERSONAL EXPERIENCES SHARED

BY CHERRY CROWDEN

When we first opened the doors of our guest house in Cape Town, South Africa, in 2003, we were first timers in the hospitality industry but not newcomers to relationship marketing. We were graduates from the tough world of corporate business and seasoned marketers, both having completed successful careers in the luxury consumer goods industry working with the Swarovski crystal company.
Customer communications strategy

We designed our customer communications with bull’s eye precision. The branding, image, and visual identity were made to reflect the positioning of the guest house as an upmarket, alternative holiday destination offering the discerning traveller a great customer experience.

We introduced our package of services through a publicity campaign, informing our global network of corporate associates and colleagues via e-mail announcements followed by regular news updates. We didn’t waste money on traditional advertising, which is only effective to a mass audience; instead we concentrated on grass-roots marketing. We invested time (and money) to personally contact prospects in Switzerland and Austria to promote South Africa as a holiday destination.

In the second phase, we extended our communications beyond our network and reached out to acquire new customers from the defined market. Again, this was done via non-traditional advertising, e.g., participating at South African tourism initiatives in Switzerland and Austria, contacting the consulates regarding our hospitality offer to Swiss and Austrian executives, and submitting editorial content to German-language travel and leisure magazines. We also applied for entry and subscribed to selected tourism industry organizations and accommodation guides, such as the Tourism Grading Council of South Africa (4-star grading) or the “Portfolio Bed and Breakfast Collection, South Africa and Swaziland”.

Competitive edge

The charm of a privately-run guest house is that the facilities provided are all that a guest expects, but it has its own distinctive character. When we researched other guest houses in Camps Bay, we found that the main focus of their promotions were the important but “physical” features, e.g., location, size of guest rooms, interior decoration, swimming pool, etc. We wanted to provide at least the same level of “physical” comfort but add a distinguishing set of “soft” values.

At Sundowner Guest House, the value added for the first-time Swiss/Austrian visitor would be that:

– German is spoken by the owner-managers,
– a concierge service is offered even before they leave home, including tailor-made itineraries,
– topical German-language information and literature are available,
– “continental” breakfast is offered, featuring food and beverages which they relate to,
– the owner-managers are on-site to assist the guests during their stay.

In other words, the guests’ personal and individual wishes and expectations would be met and we would create an environment of information, assurance and comfort.

Putting theory into practice

Over the course of the last six years, we have practiced what we preach and our relationship marketing approach has placed our “B & B” establishment securely on the map. We have enjoyed a growth position from the first season. Gradually, we have extended beyond our core segment and attracted individual visitors from Germany (obviously) but also from the United Kingdom, Ireland, USA, the Netherlands, Norway, France, Italy and Spain. We generate enquiries through our web site and the accommodation guides, and acquire referrals through the Camps Bay Accommodation Association. We communicate with guests primarily via e-mail. We only set up a guest file once we have a confirmed booking with a deposit. It. We manage the season’s booking calendar and guests’ special requests on an Excel file.
The guest house business is high-touch but low-tech. The advantage of a small operation is that you really have the opportunity to get close to the customer. We have face-to-face contact with our guests every day of their stay. Unfortunately, the size of the operation cannot justify the expense of a purpose-built CRM system. Our challenge is to remember the individual guests and memorize their personal preferences. We adapt our services to suit the customers’ strategies. We create rather than control and develop by doing. This method forms part of an ongoing process with incremental improvements.

Relationship marketing: a protection against financial crisis

Relationship marketing encourages visitors to come back again and again and motivates them to make positive referrals to their friends and families. The worldwide financial crisis and resulting recession in our small hospitality business, so far. In fact, at Sundowner Guest House, we can claim that 2008 to 2009 was our best season yet!

The main implication of the global economic crisis for our own “B & B” business was hesitancy on the part of our guests to book well in advance. Understandably, they were cautious to commit themselves surrounded by economic instability. But our customers are generally older and more mature. They tend to handle their finances well and haven’t really felt the impact of downturn. We hosted 169 guests: 30 were repeat guests. The number of repeat guests and referrals has been extremely rewarding, thanks specifically to good customer relations. Sundowner has been more resilient than many of the other guest houses in Camps Bay. Resiliency comes from marketing that listens and responds. Although we cannot imagine doing business in any other way, our fellow South African guest house owners still rely on old-fashioned marketing tactics to promote their businesses. Acquisition and sales (of rooms) garnered from paid advertising is the key focus. High occupancy rates are the goal, but the downside is short stays and low retention rates.

We believe that building a communications strategy and a process based on word of mouth and ensuring positive customer experience is hard work but it pays off!

BSI meeting I No. 2/09 I Keynote: For the love of guests

Even more know-how
The existing synonym search has been supplemented by a full-text search in the knowledge data bank. This enables the representative to identify the customer’s request very quickly, provides information and begins, when necessary, the appropriate process. Experts can also be managed in the database.

Multilingual scripts
As a new feature, complete scripts can now be displayed. Every step is recorded in an editor in multiple languages. In the process, the usual BSI CRM placeholders are allowed, as well as branches and jumps to other steps and external systems. The highlight is that data entry is allowed in the script domain. Thus, complex, customer-specific scripts can be created and the representative can incorporate the customer’s feedback into them. This valuable data is then ready for further use (e.g. in the marketing module).

E-mail integration with content analysis
Incoming e-mails are analyzed and the language and case number are identified. On the basis of content analysis, the most likely process is identified, the e-mail is turned into a case, and the correct organizational unit within the company is assigned to handle it.

Document generator
Many processes end in written communication with the customer. The newly integrated document generator largely automates this task. After the text body is chosen, the document is created (PDF, Microsoft Word or e-mail) and sent locally or centrally.

BSI CRM Release 12.3: meaningful automation in the contact center
While customer dialogue is again increasing in importance, it does not eliminate the enormous pressure for efficiency in service centers. The current release of BSI CRM accommodates this trend and frees representatives in call and contact centers from routine tasks even more, making time for individual, proactive customer conversation.

The 5 advantages at a glance:
1. Expanded process structure and selection
2. Full-text search in knowledge and expert data bank
3. Multilingual guided scripts
4. Intelligent e-mail content analysis
5. Document generator

BSI meeting I No. 2/09 I Meet the future/BSI CRM Release 12.3
Go Karin Thürig!
Despite setbacks due to injuries, Karin Thürig is making great strides. Upcoming highlight of the season includes:
14 November 2009
World Championship 70.3 Ironman in Clearwater, Florida, USA.
We’re keeping our fingers crossed for Karin!

Two new BSI locations
BSI shall be represented in two new locations by November 2009 at the latest: in Zurich and near Frankfurt am Main, Germany. With the office at Förrlibuckstrasse 181 in Zurich, BSI is opening its fourth branch location in Switzerland.

It’s nice to give
Small gifts retain good customer relations. It’s the thought that counts! In this section we present innovative product ideas for effective give-aways.

“Weltgeist” made in Switzerland
Give your customers a brand-new piece of Swissness to take along with them: launched in 2009, the SKROSS World Travel Adapter produced in Switzerland by WorldConnect is the world’s first 3-pole travel plug adapter that meets the highest security standards. It works with most 2- and 3-pole outlets in over 150 countries (protection classes 1 and 2). The adapter is delivered in a noble microfiber bag and comes with a lifelong guarantee.

Size: 7.3 x 6.5 x 5.7 cm
Price: CHF 19.90 each for orders of 100 units (retail price: CHF 60/each)
Logo: Imprint possible for orders of 25 units or more
Source: www.pandinavia.ch

Nicolas’ iPhone applications

Fun
FastFinga (CHF 1.10)
While e-mails and SMS may lack a personal touch, with FastFinga you can scribble messages with your finger and then send them off. With its intuitive operation, the application works astonishingly easily and well!

GAME
Monkey Island Special Edition (CHF 8.80)
Steer Guybrush Threepwood around Scumm Island and help him become a powerful pirate. This is a remake of the 1989 classic with spruced-up graphics and voice output. Happily, other than this, nothing else has been changed in this perfect adventure. Use the rubber chicken with the cable!

TOOL
”Tages-Anzeiger” (free)
This application makes reading the news (such as on the way to work) a true pleasure. Even the first version leaves little else to be desired and makes a newspaper subscription superfluous and saves you the trip to the box to pick up the free newspapers.

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In the motorcycle world, Vmax is known as the muscleman par excellence. How does V-MaX work at the post office counter?

The V-MaX project places the employee in the foreground. Unlike other optimizing projects, the primary focus here was not cost, but the user-friendliness of the application, with the aim of optimizing processing time to create more service time. This is the crucial point, because in this way we make more time for customer assistance. In German, the name V-MaX encompassed the team’s project objective, which was simplification (V) for the employees (Ma) in customer transactions (X), and for management and employees at the post office V-MaX also stands for the maximizing of sales. The strong symbolism of the motorcycle naturally also contributed to this – the image of this modern and powerful motorcycle helped us get the project goal across to all concerned.

What was the catalyst for the redesign?

Our analysis at the post office counter revealed inefficiencies in the operation of the counter application. For example, an employee needed substantially more time to enter a package as “Priority” than to do the same as “Economy.” This astonished us, until we noticed that the employee had to scroll through a drop-down menu in order to enter the product. What stood out to me while observing counter operations was the restlessness in employees’ motions while processing customer transactions: the mouse was used again and again, then the keyboard, then scrolling again and so on – it all seemed hectic to me. From this, I formulated the objectives for the redesign of the counter application’s user interface: specifically, to calm down activity at the counter.

And what was the greatest challenge?

We bear great responsibility for our counter staff. The software is used daily by 10,000 people in 2000 post office locations, so we had to make sure that the redesign could be implemented “silently” and that normal activity would not be affected. It was also our task to effectively change something in a positive way, to make concrete improvements and not just engage in window-dressing. Counter employees controlled the brakes throughout the project – they made decisions about the how and what of the project implementation, and if they hadn’t felt noticeable improvement we wouldn’t have introduced it. You can imagine how high the risk was! The staff’s daily routine using the existing application had to be cracked, as it was pitted against the new one and could have very easily led to rejection of the project results. The success of the project greatly depended upon meeting the needs of the front line staff by directly involving them in the project – with respect, caution and intensive staff training.

What was your vision for the new user interface?

The topic of ergonomics plays an essential role, if I intend to bring about noticeable changes for employees. I derived fundamental principles for the user interface keeping in mind my goal of “calming”. In regard to navigation, for example, this means clarity: each function must have the same functionality always and everywhere in order to ensure the application’s
continuity and consistency for the user. In terms of scalability, future changes should also be displayable in the navigation, such as additional functions or new functionalities. In regard simplicity, we set ourselves the goal of being able to carry out 90 per cent of standard counter transactions with just a single click. The answer was to use shortcuts, which meant an elimination of scrolling and thereby faster service through the keyboard and easier navigation. To boost clarity, I wanted to offer the employees process reliability. This entailed dividing the main display by procedure and leading employees using color coding.

How did you include counter employees in the redesign?
Employees from the post office locations participated in development right from the start, from prototype application all the way to shaping training. We also worked with different versions and had them tested and evaluated by the employees. It was also very important to me to integrate all those involved and affected. Those were not only the counter employees, but also the IT Department PV53 and the IT Post. In project management, I relied upon my deputy Simon Treichler and my team, all of whom did fantastic work. This enabled me to concentrate completely on my surroundings and make sure that all the wheels were well-oiled and that the project advanced quickly.

How did you walk the fine line between substantial changes and employee habits?
By being radical. That is the only way to truly move forward and not merely improve the existing solution. However, the advantages of the change must be convincing. And there is a limit to what is doable, of course, but that was never my starting point. Furthermore, credibility is crucial to success. Luckily, the stakeholders believed in us and our intention to change this for the better.

This was perhaps the greatest reorganization in the field of counter software. Yes, it was a complete transformation of the user interface. While change also alienated a lot of people, they quickly felt that something special was happening here, something beyond the ordinary, and so the mood eventually changed from rejection to participation. In addition to the actual project management, my role was to develop the “spirit” and spread the “virus” of enthusiasm. The backing of top management and particularly that of Patrick Salamin, Head Post Offices and Sales was essential in this regard, and became a true success factor in this project.

The software developers also had to change their thinking. Yes, we expected a very agile form of software development. Up to now, development at the Post had taken place according to the classic waterfall model. We worked in high iteration loops for this project – development workshops were followed by a weekly review session in which we refined standards and software developers received detailed feedback. This is where the BSI staff had to swallow hard for the first time, but the BSI corporate culture really helped. As a modern, successful company, BSI listens to its customers and responds to their needs. This was the right foundation for making radical changes in the work process and course of action. CEO Christian Rusche recognized the chance right away and supported us wholeheartedly. It was important to not get into battles about expertise, but instead search for new ways to make positive energy flow towards mutual success.

What were some other success factors?
In addition the team’s expertise, open communication and cooperative interaction, empathy with the employee was an essential component of the project goal. Our method of working and the results came rapidly, easily and were sleek like the Vmax motorcycle. Success was based on clean analysis with substantiated data, over 80 ideas and a well-organized test and pilot phase. To keep up the tempo, we had a tight weekly action plan and were present on-site at post office locations and next to the developers’ screens. Only in this way were we able to keep up the required speed. A project like this normally takes two and a half years; we needed less than one and had implemented almost all of our ideas by then.

What are the measurable successes? Who has benefited?
Everyone: the customer because everything moves faster and the employee because it is easier to work. If and how the employee uses the time saved to actively sell products and services is another topic. The introduction of keyboard shortcuts was definitely the most lasting improvement, although it did lead to confusion in the beginning. For example, the F12 key was previously linked to the calculator.

The future of the post office counter is designed at the Swiss Post’s headquarters in Berne.

Now, the F12 key is linked to the shortcut for stamping letters B-post. Frequent calculations pointed to this confusion so we had to point out the correct use once again.

Was the training insufficient?
Yes and no. It had more to do with the concept of training. I asked myself: how do I empower employees to deal fundamentally with changes at the counter? Towards this end, we created a special brochure for use at the post office counter. We wanted to introduce a training method that enabled each employee to deal with the new material independently and also apply this method to future situations. Unfortunately, this concept was not approved.

What do the next steps look like?
The next major issue is the integration of third-party applications. In addition to V-Max, employees must currently master over 15 other web applications from providers such as Ticketcorner, telecommunications firms or the Motor Vehicle Department. A standardized transaction process that runs on our application and is only fed by the third-party systems would lighten the employees’ load.

What does the future of the post office look like?
Customer contact is an essential asset, which means that business at the counter will continue. It is up to us to define how we will shape it further. We are currently working on improving background processes.

And what will the interaction between man and machine look like in the future?
Touch screen technology is definitely approaching and will change the counter environment massively. Naturally, it will no longer be on top of the counter but integrated into it, which shall have an impact on all other devices. It’s important to be able to pursue worthwhile and meaningful work. Simplification alone is not the point. Ergonomics as a keyword fits much better because it suggests a pleasant manner of work. Naturally, simplicity is always pleasing in terms of clear arrangement and transparency, but technology must not become an obstacle. It should be possible to do a good job advising the customer with the support of the device. This is still a huge challenge. Even with many workflow-supported systems, we are miles away from being able to respond to customer situations flexibly.

The application of the future should be configurable online. For example, to open the module that I want to use, I just pull it onto my screen with my finger. Employees individually assemble “their” interface and handle customer business individually and optimally.
With over one million cardholders, Viseca Card Services SA is one of the leading card issuers in Switzerland. Based on the world wide leading brands MasterCard and Visa, Viseca offers a wide range of products for partners in retail banking, private banking or outside the financial sector. As a company within the Aduno Group, which spans the entire spectrum of services focused on cashless pay- ment transactions, it is owned one hundred percent by various leading Swiss banks.

The depiction and support of the different processes and complex product structures was one of the main challenges for the new CRM system at Viseca. The platform should also be able to be used group-wide in the future. Beyond this, the new solution should integrate partner banks as well as sales partners in the working process of the credit application flexibly and in a modern way, including individual control of all authorizations.

Because Viseca's existing CRM software was closely aligned to the company’s business processes, migrating to a new version of the old software would have been as involved as introducing a new system. Viseca thus decided to replace the existing CRM application.

**Looking ahead with SOA**

The new application should make use of the advantages of a service-oriented architecture such as modularity and the reusability of services. The Corporate Center, a business division within the Aduno Group responsible for customer support as well as data processing and analysis, together with a partner, drafted the fundamentals of CRM in SOA — the so-called “SOA Cookbook”. The first web services were written as prototypes for the application of SOA: card issuing over a web GUI and the automation of credit rating queries and verification.

Satisfied with the initial results and with a clear concept in mind, the Viseca project team began the search for other necessary core CRM functionalities. Stefan Kämpfer, Head Business Management & Production at the Corporate Center, recalls the evaluation process clearly: “We had already had experience with various CRM suppliers and thus knew exactly what we were looking for: a flexible CRM application written in SOA with the ability to integrate our in-house developments into a good GUI and offer new services out of it.”

**Merging business logic and system intelligence**

BSI CRM caught the eye of Viseca’s project team because its software architecture is 100 per cent service-oriented. The BSI CRM user interface also surprised the discerning testers: “For us, it was a relief to see that what we had imagined as a casual, easy user interface already existed. The users liked the tool immediately,” explains Kämpfer. Beyond this, BSI CRM met the demands of “Joint Development” — the collaboration between BSI and a CRM service development team within the Aduno Group itself — that it be vendor-independent, maintain high cost transparency and that it be possible to implement adaptations more quickly.

After a final pilot implementation of a complex customer service process, the decision was made in favor of BSI. The task was to support a call center representative in offering the customer an alternative product upon credit card cancellation, including decision trees and a conversation guide. The result was a controlled process that contained the entire business logic in the application. Kämpfer says: “BSI already understood our business very quickly during the pilot phase and provided interesting proposals for optimizing processes.”

**Automation of routine tasks**

In summer 2009, as a first step, BSI CRM was implemented under the name “Agios” in the “New Account” sector of Viseca — that is, in the collection and assessment of credit card applications. The advantages are evident: whereas the representative previously had to rely on checklists, instruction sheets and tables, today the Process Wizard leads him/her through the complex process of card and account opening.

As with every implementation, there were also stumbling blocks at Viseca. In particular, depictions of processes that are complex because of partners’ varying demands and products, as well as an internal
scarcity of resources are elements that Stefan Kämpfer mentions as obstacles. “But we were able to get them out of the way quickly thanks to the great expertise of the BSI developers,” says Kämpfer.

Many of the verifications that the representative previously had to conduct independently are now automated in Agios. Through the integration of internal and external credit rating information and the automation of verifications, an application can be processed more securely, more easily and faster. The system supports the representatives – based on a rulebook combined with an application scoring model that is continuously adapted and optimized through business analysis – in judging whether an application can be approved or whether other product options should be offered.

Step by step to the company-wide Agios platform
In the next step, the customer service department shall be connected. Unlike at account opening, where a regularized process is important, it is essential to customer service to respond to customers’ situations flexibly. Here, the first phase, identifying the customer, should be conducted tightly. Afterward, flexibility in fulfilling customers’ requests is important. The system should above all support representatives by clearly laying out relevant information.

“THE USERS LIKED THE TOOL IMMEDIATELY.”
Stefan Kämpfer, Head Business Management & Production, Corporate Center, Aduno Group

Increasing efficiency and quality
“Agios has indeed been in use too short of a time to measure its success. However, we already feel gains in efficiency and quality,” says Stefan Kämpfer. Despite the vacation season, the high volume connected with it, and the new implementation of CRM, Viseca has experienced no drop in efficiency and the quality of collected applications is higher than before.

It is moreover expected that training new employees will take less time than before because employees can learn the process cycle in part along with the application. The processes and respective product definitions are integrated in the system. Thanks to the simple interface and the reduction of information shown on the screen, the system is intuitively understandable. “The testers were just thrilled with the new user interface. I’d really never experienced that before,” explains Stefan Kämpfer.

F rom Argentina to Canada, from South Africa to Norway and from Australia to Russia: Sika serves its customers in 72 countries with products and services in the field of specialty chemicals. Among their products are adhesives and sealants for the construction sector or for the automotive industry, developed in in-house research centers and produced in plants dispersed throughout the world. The global network of local subsidiaries has evolved over time and is managed locally.

The decentralized organization of the Sika company confronts the challenges of a globalized economy. Particularly industry customers often ask for products from different company sectors and across country borders. For example, car manufacturers source adhesives for glass parts and synthetics for the quietest and low-vibration interiors possible from Sika – and for different model series, brands and production locations. “The seller must be able to gain a comprehensive overview of the customers in a short amount of time in order to be able to provide targeted supply,” notes Dr. Stefan Obst, Team Leader CRM at Sika Information Systems Inc., the in-house IT division at Sika.

These standards conflicted with the working processes at Sika at the beginning of the project. Customer data was exported locally in Excel worksheets from autonomous CRM or ERP instances in each country’s subsidiary, then collected centrally and consolidated manually. “That process was not only quite error-prone. The company-wide data was also only available after a considerable time delay and was then actually already obsolete again – not counting the time needed for consolidation,” summarizes Stefan Obst.

A solution for all
Back to the beginning: in 2004, the Sika Group initiated a global CRM initiative with the goal of optimizing selling processes and thus improving turnover and profit margins. Beyond this, the basis for interdepartmental and cross-national key account management should be created. The creation of greater transparency in the domain of customer knowledge was also one of the goals of the initiative: customer and project knowledge should be available throughout Sika and no longer be dependent on individual people.

Under the project name “Golden CD”, corporate management defined in 2004 that standardized software...
infrastructure for the management of customer relations should be implemented worldwide. “This was, given our highly decentralized structure and the heterogeneous IT landscapes at our subsidiaries, a true challenge,” remembers Alex Rageth, then Project Leader CRM and now Head of IT Sika Asian Pacific. The question was: how can the demands of a seller in the Vietnamese cement industry and those of a seller in the Italian auto supply industry be reconciled?

**Step 1: local CRM installations**

“The way we saw it, BSI could answer this question best with BSI CRM, then called ORS,” says Alex Rageth. “We were especially convinced by the flexibility and intuitiveness of the CRM software. BSI CRM was extremely adaptable to the needs of employees in our different locations. Even then, the interface always remained easy to operate.”

After the start of the project in 2004, Alex Rageth and his team introduced BSI CRM in over 40 countries within two years. The project team decided to first gradually introduce autonomous installations in each subsidiary. For example, customer data was categorized according to the needs of the location, roles and rights were distributed and gateways to existing ERP systems were created. “This approach has the advantage that fewer dependencies between existing systems had to be accounted for. Also, BSI CRM runs on local servers, which makes the system independent from performance fluctuations and connection bottlenecks in a central installation,” summarizes Joachim Schlegel, Project Leader at BSI.

But these are only the technical aspects of this mammoth project. “What was especially important was the wide inclusion of employees, meant to dispel fears about replaceability and to present the advantages of a group-wide CRM solution.” remembers Alex Rageth. A success factor was also the wide support of local languages by BSI CRM: the software has so far been implemented in 31 languages at Sika, including Greek, Chinese and Arabic. A good part of the project’s success was also accounted for by the standardized rollout and training concepts of the project team and, last but not least, the full support of the CEO of the Sika Group.

**Step 2: overview**

After the introduction of the autonomous installations, the CRM project team at Sika began the next step: the implementation of a total solution. “Customers that source products and services from different business units within Sika want to know all the relevant information about the existing business relationships during negotiations – also on the regional and global level,” says Team Leader Stefan Obst. The project “CRM Boost” set up in a few months, with the help of BSI CRM, a solution on the autonomous CRM installations that makes a global view of customer and project data for key account management and reporting across the group possible. With the release that went live in mid-2008, it is possible to:

- display local, regional and global key accounts,
- aggregate all relevant customer data cross-nationally and across departments,
- get an overview of local, regional and global key projects (e.g. cross-national train tunnels).

“Thanks to CRM Boost, we now have up-to-date data on business with the most important customers available to us – even worldwide. The Excel flood has been contained,” says a thrilled Stefan Obst.

**Further development planned**

After CRM Boost 2008, continuous enhancement of the CRM solution at Sika is planned. The next release in fall 2009 will contain, besides improvements brought in by local key users, more functions for management of key accounts, such as reporting on group and holding structures. Furthermore, the hierarchical depiction of local, regional and global key accounts will be refined.

And other integrative steps are planned for the future: “We should make even more data from decentralized ERP systems available in BSI CRM wherever this makes sense for CRM end users, better integrate peripheral systems such as calendars, e-mail and telephone installations, and support processes more continuously,” says Stefan Obst.
The name “scrum team” may not exactly evoke visions of beauty, which made the interview with Anna Schnauder, who is marking her first anniversary at BSI, even more of a pleasant surprise. Instead of a man in overalls carrying a tool box, I was met at the elevator by a smiling young woman wearing a lavender jumper and high heels. As we all know, however, looks can be deceiving. With her impressive expertise, communication skills and dedication to customers, Anna Schnauder does indeed have the right tools to contribute to the integral success of any project.

What brought you to Switzerland?
I followed my boyfriend here in 2006, but I found that my liking for the country lasted longer than my boyfriend and I decided to stay. A friend of mine told me about BSI and I was pleased to get a job here.

What do you like about Switzerland?
I love nature, the beautiful landscape, pleasant people and the positive attitude most people have. They aren’t complaining all the time.

Where would you like to live?
I’m not sure yet, I guess I’m still exploring.

Do you have a dream?
I have lots of dreams. Someday, perhaps I’d like to settle down with a family with a nice house in the country.

Hobbies:
I am just learning rock climbing, have dabbled in kickboxing, enjoy mountain biking and snowboarding.

Proudest moment:
When I overcame my fear of heights and climbed to the top of a rock climbing wall for the first time.

Most embarrassing moment:
When I met a customer whom I had previously met a year ago when I first started at BSI and had since forgotten that I’d met him. He, however, remembered me.

What do you like about yourself?
I am modest, goal-oriented, quick on my feet and a fast learner.

What don’t you like about yourself?
I tend to be too self-critical. I think I could be more disciplined, because I sometimes tend to procrastinate.

Is there something you are looking forward to?
I am going to visit Australia and Japan on a long trip with my boyfriend. I am excited to see Australia and also to visit Japan, where I was born, but haven’t been back to since I was a baby.

What’s a scrum team?
Scrum is a new holistic approach that increases speed and flexibility in new commercial product development. This approach, in which the phases strongly overlap and the whole process is performed by one cross-functional team across the different phases, is comparable to rugby, where the whole team ‘tries to go to the distance as a unit, passing the ball back and forth’.

Are there different roles within the scrum team?
Scrum is a process framework containing sets of practices and predefined roles. The main roles in scrum are:
– the Scrum Master, who maintains the processes (usually instead of a project manager);
– the Product Owner, who represents the stakeholders;
– the Team, a cross-functional group of about seven people who do the actual analysis, design, implementation, testing, etc.

Do you have a goal at BSI?
To learn as much as possible, to develop my skills and to get to know the applications and products in order to be able to better present them to our customers.

What has been your greatest challenge at work?
Getting started was really a challenge. I had to quickly get up to speed not only with a new project, but with a whole new way of working. It was really trial by fire.

MEET THE TEAM

Please meet:

Anna Schnauder
Born in: Tokyo, Japan
Birthday: 18 April
Sign: Aires
Citizenship: German
Studied: Diploma as Business Data Processing Specialist at the Berufskhakademie Stuttgart
Lives in: Bergdietikon AG (but moving soon)

Favorite foods:
like steak (rare) and sushi (raw).

Favorite color:
I have a reputation at BSI for liking pink, probably because of my pink iPhone, but really I love all bright colors.

Do you have pets?
I would like to get a cat soon.

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We recommend that you visit our internet platform regularly to receive detailed and continuously updated information about BSI’s products and services.

Meet your BSI

BSI will be present at the following trade fairs and conferences in the coming months. We look forward to talking to you about your challenges and our solutions.

**Baar**
BSI Business Systems Integration AG
Zugerstrasse 74
CH-6340 Baar
Phone +41 56 484 19 20
Fax +41 41 766 86 10

**Baden**
BSI Business Systems Integration AG
Täfernstrasse 16a
CH-5405 Baden
Phone +41 56 484 19 20
Fax +41 56 484 19 30

**Berne**
BSI Business Systems Integration AG
Grubenstrasse 107
CH-3322 Schönburg
Phone +41 31 850 12 00
Fax +41 31 850 12 99

**Zurich**
BSI Business Systems Integration AG
Förrlibuckstrasse 181
CH-8005 Zurich

**CRM-expo Nürnberg**
Hall 12, booth B52
8/9 October 2009
NürnbergMesse, Nürnberg, Germany
www.crm-expo.com

**Eclipse Summit Europe**
27–29 October 2009
Forum am Schlosspark
Ludwigsburg, Germany
www.eclipsecon.org/summit2009

**DIA Europe**
3rd Annual Clinical Forum
Booth 6
19–21 October 2009
Nice Acropolis, Nice, France
www.diaeurope.org

**CallCenterWorld 2010**
8–11 February 2010
Estrel Convention Center
Berlin, Germany
www.callcenterworld.de