

PostFinance upgrades CRM system to the state of the art

The number 1 in Swiss payments has launched itself into the digital future together with its CRM partner BSI

Baden, 16. July 2018 – **PostFinance has completed the replacement of its core banking system. The goal of this major project was to become an even more attractive (finance) partner for its more than three million customers in the digital world, to be able to provide digital products faster and to enhance the flexibility, security and stability of the systems.**

The PostFinance IT system has grown organically since the 1990s. Now it has been made fit for the digital future with the replacement of its core banking system. This transformation project aimed at digitalization should secure PostFinance a leading role as a digital bank. PostFinance intends to become a digital powerhouse by 2020, and to become the leading digital bank in Switzerland. As a preferred partner for retail customers, as the provider of integrated solutions for business customers and as an innovation leader in future banking, PostFinance seeks to score points among its customers with new business models that go beyond the classic financial range.

Laying the basis for the digital future

PostFinance has laid down the technical foundation for the digital future with the replacement of its core system. At the same time, this leading financial institution took on a major task with its future strategy, one with far-reaching consequences: virtually every application was upgraded, along with the corresponding interfaces. All information for business and private customers has been merged since 2004 into a central BSI CRM solution. The upgrade shall ensure that the CRM is also up to meeting the requirements of the digital future. PostFinance decided to digitally transform both its core banking and CRM systems at the same time, to bring them up to the state of the art, orientating them towards the customer experience of the future.

Partnership with customer focus

PostFinance and BSI have maintained an intensive relationship for more than two decades. Not only was the CRM system for customer reps and customer service staff provided by BSI, but also the counter application in post offices, known as V-MaX, and the onboarding application for the back office.

“BSI CRM is the mainstay for the day to day work of more than 2,000 users at PostFinance,” stated Markus Fuhrer, CIO at PostFinance. Within the scope of the core banking transformation project, BSI CRM was updated to the latest version. “This enables us to better meet the demands of a digital bank in the future,” according to Markus Fuhrer. The new CRM solution can also now be used by double to triple the number of users at the same time, with optimal performance.

Impressive figures

The new CRM solution integrates customer rep portfolios and customer segmentation with complex sets of rules.

Around 200 processes with up to 110 process steps and 275 process-specific sets of information were collected and linked with the rulebook.

1,000 jumps to other website and peripheral systems will be gradually configured so that staff will be able to look after their customers in their respective languages, and as of autumn 2019, free of media disruptions.

Customer reps benefit from improved preparation including an appointment coordinator and scheduling which synchronize with Outlook, and seamless post-processing.

Cooperative teamwork

The new CRM team consists of members from both PostFinance and BSI, who will work together to develop new solutions starting August 1, 2018. This means that PostFinance retains control over its customer interfaces and, at the same time, can rely on BSI's more than two decades of experience. This will be especially important now after the completed upgrading of the core banking system, since numerous innovations, which were put on hold during the system transformation phase, shall now be quickly developed.

A great privilege

“A core banking system replacement only takes place – if at all – every 20 to 30 years. To be able to be part of such a complex project is both a great privilege and a major responsibility all at once,” said Peter Seitel. The BSI project manager is very pleased that this major project, after 2.5 years of intense preparation and four thorough test runs with maximum load tests, has now been able to be launched productively. “We are proud and glad that each individual requirement that our dedicated

BSI staff configured or wrote for PostFinance not only just functions, but has been of service to both employees and customers right from the beginning. The project is surely among one of the most exciting highlights in our faithful cooperation of many years with PostFinance,” summed up Peter Seitel.

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