

BDO counts on BSI as the master system for customer relationship management

Some 1,400 BDO employees at 34 locations use the CRM system from software company BSI for the management of more than 24,000 customers.

Baden, June 16, 2021 – BDO, one of the leading auditing, trust and consulting companies in Switzerland, uses BSI to manage its customer data and customer relationships. BSI replaced two previously used CRM systems when the new CRM solution was rolled out for over 1,400 employees in all 34 locations in Switzerland.

During the project, the software company BSI stood out with its many years of experience in B2B CRM. Stefan Gerber, CRM project manager at BDO, explains the company's selection of BSI: "With the wide range of functions the BSI CRM solution has, we can ensure individualized customer service along with efficient and simple processes."

With support from the CRM solution from BSI, 1,400 employees serve more than 24,000 customers. A well-thought-out data model and an SAP integration form the basis of the new CRM system. BSI CRM is the new master system for customer data, replacing SAP. Since the company continues to use SAP for accounting, real-time interfaces to the SAP system were implemented. In addition, BSI replaces the previously used CRM systems, therefore making it easier for the company's customer reps to provide customer service.

Optimized data quality and efficient customer data collection

BSI chose automatic data cleansing, including duplicate checks, to create an ideal starting point for the new CRM system. An interface to Bisnode, the data broker, additionally protects data quality: When a new customer is entered into the system, potentially matching entries are automatically displayed and can easily be applied to the CRM. In addition, it is straightforward to transfer classifications such as legal form, industry codes (NOGA), company size, and key figures such as revenue and number of employees from Bisnode into the CRM.

Thereby, BSI facilitates sustainable and efficient customer service, and the customer reps benefit from fast and easy data input. Even the mutation of customer data has become foolproof. To ensure the standardized use of BSI CRM, the BDO project team, with support from BSI, trained

roughly 1,400 end users. Stephan Bolliger, partner and member of the BDO management, is pleased to report that “A standardized CRM solution with efficient processes is essential for our strategy and further development, and BSI is the right partner with the right product for that. We are confident it will be a success.”

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About BSI

Impress your customer – that’s the promise we make. With its BSI Customer Suite, the software company BSI provides a comprehensive zero-code platform to digitize the customer relationship. With solutions for Customer Relationship Management (CRM), Customer Experience (CX), Data Management (CDP), customer insights and artificial intelligence (AI), BSI helps companies delight their customers in real time along the entire customer journey. Thus, marketing, sales and service teams have everything they need for cross-channel, automated and personalized customer communication. BSI provides powerful solutions to the retail, banking and insurance industries based on its many years of industry expertise. All solutions are component- and cloud-based. Established in 1996, the company now has eight locations in Germany and Switzerland. BSI is organized as a network without hierarchies, an organizational structure for which it has already won several employer awards. BSI customers include market-leading companies in Europe. Visit bsi-software.com for more information.

About BDO

BDO AG is one of the leading auditing, trust and consulting companies in Switzerland. Its core competencies include auditing and financial services, fiduciary, tax and legal consulting, and business consulting. With 34 offices, BDO has the most extensive branch network in the industry. The company’s approx. 1,500 employees consider proximity and expertise to be essential prerequisites for successful and sustainable customer relationships. BDO AG provides auditing and consulting services to companies in the industrial and service sectors, including small and medium enterprises, publicly traded companies, public administrations and non-profit organizations. In addition, customers with an international presence can engage the global BDO organization in more than 160 countries. BDO AG is headquartered in Zurich and is a separate and legally independent Swiss member company of the international BDO network, which has its headquarters in Brussels, Belgium.