

The BSI Customer Suite puts the customer first

Baden, February 13, 2023 – **For any company, customers are an essential factor that determines success or failure. In today's digital age, more than ever before, companies must meet their customers in places that are relevant to them. A digital solution is a prerequisite for this: to actively design customer processes and also to support these processes with intelligence and data, even from external systems. The new Release 23/1 of the BSI Customer Suite reflects these customer requirements: the CRM system as an industry-specific solution, integrated, tailored to a company's DNA and always up to date, thanks to its connection to the cloud.**

The BSI Customer Suite: Functionally compelling and customizable

The BSI Customer Suite encompasses all areas of customer relationships and actively supports the user with well thought-out features. Assisted processes and a 360° view in BSI CRM, the convenient creation of automated and delightful customer journeys for marketing, sales and service teams in BSI CX – the BSI Customer Suite's individual products combine to provide a comprehensive CRM solution.

Representing the foundation, the two platform products BSI CDP and BSI EIP provide for all your real-time customer data (CPD) and a modular corporate-wide integration (EIP), including companies' ecosystems. The solution is complemented by BSI Engage, the video selling platform that encompasses electronic signatures: It helps you create proximity to your customers through collaborative selling, legally secure signatures included. All products are supported by BSI AI with algorithmic and deep intelligence, and by BSI Insight, the product for elaborative analytics, allowing your users to elicit patterns from customer behaviors that facilitate proactive decision-making. The BSI Customer Suite is an all-in-one solution composed of seamlessly interwoven and well-attuned products. Beyond those products, you can also expand it with special solutions and easily integrate it into your company's complex system landscape. This interconnection between sales, marketing and service is essential to our mission, which is: to impress your customer.

New features broaden the communication spectrum

In Release 23/1, the individual products of the Customer Suite are equipped with functions that present additional possibilities for designing customer communication processes. In BSI CX, this expanded range is reflected in its central feature, the "participate" story. This feature expands campaign management to include the ability to collaborate: Decentralized locations, such as

branches or local agencies, can participate in CX campaigns the central office prepares and runs. This means you need to do comprehensive campaign planning only once and can then have other locations use and customize the campaigns for their own customer records. Participants obtain information about active or planned stories in the CRM cockpit and can “participate” with their choice of customer data.

In addition to its new collaborative options, the BSI Customer Suite presents features for video selling that also increase the individual user’s ease of use significantly: In the 23/1 Release, the BSI Snapview and Microsoft Teams clients are completely integrated, and you can set up online meetings directly on the CRM interface where they are centrally documented. Christian Rusche, product developer and CTO, calls Release 23/1 a monumental step forward. “Release 23/1 is a strategic milestone in its functional breadth and technical depth,” explains Rusche. “Twelve months of hard work are behind us: Our customers in sales, marketing, service will definitely notice the enhancements.”

Using Artificial Intelligence to simplify and automate processes

BSI AI, which offers across-the-board added value for decision-making, analysis and automated learning processes, takes a giant step forward by implementing fuzzy logic: In addition to the solution’s comprehensive deep learning feature, the fuzzy logic allows an AI brain to map rule-based logic configuratively. In contrast to conventional methods, this facilitates the easily customizable and readily maintainable implementation of comprehensive algorithms. As a result, you can map linguistic variables with this feature that are not available with purely numerical values. In your contact with customers, this is helpful with questions such as: “What does ‘near’ even mean when searching for the nearest branch?” Thanks to fuzzy logic, it is no longer only absolute values that matter but the relevance as well – the logic collects the arguments for different outputs and the best output wins.

Like BSI AI, BSI Insight – BSI’s product for elaborative analytics – is integrated readily and fully into the BSI Customer Suite’s process design. With Release 23/1, users get a multitude of new options that quickly provide an overview of real-time data visualizations. For more in-depth analyses, the enhanced charts facilitate a greater depth of detail that can be gradually accessed with just a few clicks. BSI Insight now also uses data partitioning: Thanks to this feature, a customer’s team can share certain analyses and insights with other users – and the latter view them populated with data from the recipient’s data pool. It goes without saying that the features described here are only a fraction of the innovations in Release 23/1. We recommend you consider a product demonstration

for a better illustration of the options the BSI Customer Suite provides. Feel free to request a demo at no charge through the BSI website.

The BSI Customer Suite: Industry-specific with flexible customization

The BSI solution is already perfectly adapted to our customers' individual industries. However, today's companies need more. In addition to the technical element, a customer contact solution must also be able to map the company's DNA, both in design and functions. With the BSI Customer Suite, you can make releasable customizations either via configurations, low code, or, optionally, as contributions. With these options, BSI offers a level of flexibility that facilitates a live deployment in no time – a distinct competitive advantage.

Because successful companies must respond quickly to changes in their markets, the topic of flexibility is of critical importance. Also, customer requests sometimes change quickly: New products, channels or changed behaviors require CRM systems that offer a high degree of customizability, independent of IT departments or deployment cycles.

Three tools for easily implementing changes yourself

The BSI Customer Suite gives you this degree of flexibility with three different options for individualization: You can customize the customer solution by configurative means (no code), with low code via type script and integrated tools, and by programming encapsulated, releasable units, so-called contributions, in Java. With the low-code approach, BSI also enables its partners to add their essential know-how to the software. Depending on your objectives, these three options offer a wide range of opportunities for easily implementing releasable customizations. With Release 23/1, the topic of customization options spans the entire BSI Customer Suite: The BSI CRM process designer gets a more intuitive interface that allows users to easily design processes. In the BSI CX step library, you can implement your own steps, including logic, data storage and UI, quickly and now even through configurative implementation, making programming and a separate deployment no longer necessary.

The Cloud solution: Up-to-date and cost-effective

BSI's goal is to provide its customers with the latest features as quickly as possible. However, this is not easy to implement when it comes to on-premises solutions. In addition, using highly specialized

technology such as machine learning or extremely high-performance interfaces calls for a cloud solution. The cloud ensures that the complex technology stack can be maintained at a low cost while also facilitating easier updates to the BSI Customer Suite. The customer benefits from this approach with more cost-effective software and significantly more flexibility than with on-premises solutions. The BSI Cloud, without exception, meets all GDPR requirements for data security, is ISAE 3404 attested, ISO 27001 certified and is also available as a FINMA- and BaFin-compliant solution.

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About BSI

With its BSI Customer Suite, the Swiss software company BSI provides a comprehensive platform for the digital transformation of customer relationships. It offers everything needed for an outstanding customer experience in the retail, banking, insurance and energy & utility industries. At the core of the innovation is the company's many years of industry experience. In the insurance industry, BSI is considered the market leader for CRM software, which 130 banks, insurers and trading companies use to reach around 27 million end customers across Europe. Founded in Baden, Switzerland, in 1996, BSI has about 413 employees and 7 additional offices in Germany and Switzerland. BSI's customers include companies and organizations such as ADAC, Signal Iduna and HDI and other market-leading companies throughout Europe.

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