

Wealth Management Bank Julius Baer selects BSI Customer Suite

Baden, February 3, 2022 – The Swiss software company BSI gained Julius Baer, the wealth management bank, as a new customer for its state-of-the-art Customer Suite. With the digital experience platform BSI CX, the private bank will be able to improve its digital customer engagement further and increase the efficiency of its campaigns.

For more than 25 years, the Swiss CRM company BSI has distinguished itself as a partner, particularly to large corporations with complex requirements. It offers an extensive ecosystem and numerous standard interfaces for its Customer Suite. Julius Baer will be using the software platform to manage and deploy its global investment campaigns.

With BSI CX, a digital experience platform for marketing, sales and service automation, companies can design and automate cross-departmental customer journeys and implement, monitor and enhance them in real time. The integrated content management system and the intelligent link to the CRM system ensure that companies can provide (hyper-)personalized and needs-based support to their customers both at online and offline touchpoints.

BSI CX, customized to meet Julius Baer's specific solution needs, provides intuitive usability and a strong partner network in the background, which made it easy to link the CMS solutions and interfaces and integrate them into Julius Baer's campaign management. The Customer Suite has been in use at Julius Baer since the beginning of 2022. It enables the bank to be even more efficient and targeted in its digital customer engagement and personalized campaigns.

Marco Bernasconi, BSI Project and Account Manager, who is responsible for the project, states, "We are delighted that Julius Baer has selected BSI as its software partner to jointly design essential sales processes simply and efficiently in the future. The project also demonstrates that investment campaigns are a very powerful tool for increasing client engagement thanks to personalization mechanisms and efficient management." Against this backdrop, the Swiss private bank already has additional plans to use BSI.

BSI Media contact

Contact

Charlotte Malz, +41 (0)417668633
charlotte.malz@bsi-software.com
BSI Business Systems Integration AG
Täfernweg 1, CH-5405 Baden
www.bsi-software.com

Press contact

Katharina Söltenfuß, +49 89 62 81 75 03
WE Communications
ksoeltenfuss@we-worldwide.com

About BSI

BSI, a Swiss software company, offers a comprehensive platform for the digital transformation of customer relationships through its BSI Customer Suite. Based on many years of industry expertise, the company develops and sells powerful, specially designed solutions for retail, banking and insurance industries. It was founded in Baden in 1996, has seven additional offices in Germany and Switzerland and employs approximately 400 employees. BSI's customers include market-leading companies in Europe. www.bsi-software.com