



## Zürcher Kantonalbank AG – One view of all clients



### Client

Zürcher Kantonalbank

### Segment

Financial services

### Status quo

- ZKBConnect as the platform for administering customer information

### Role of ec4u

- Technical project management
- Technical architecture
- Implementation
- Data modeling
- Role and rights concept
- Batch interfaces (Siebel EIM)
- Online interfaces (Siebel EAI)
- Outbound communications

The Zürcher Kantonalbank (ZKB) continues to develop its existing CRM platform. The new ZKBConnect gives 2,300 client advisors a 360° view of their customers. Centralized data management supports the management and control of multilevel campaigns and the integration with various other systems from different departments forms the foundation for the daily work of the advisors with their clients.

Building on the foundation of comprehensive competence in its mortgage and loans business since 1995, the Zürcher Kantonalbank has established itself as a very successful leading force in the investment and pension fund banking sector. The ZKB is one of the five top asset management businesses in Switzerland – with client assets of about CHF 128.6 billion. The ZKB functions as an independent, state guaranteed, public institution of the Canton of Zurich. ZKB's bonds and medium-term notes have received a AAA rating from Standard & Poor's.

Since 2000, ZKB has implemented several projects with Siebel, which operate from a common platform. It started with ZKBConnect 1.0, the main application for managing customer- and contact information, as well as execution of various client-based activities. From this foundation a number of projects were started in parallel:

The ZKB marketing project ZKBDialog was implemented by ec4u. The software allows to manage media advertising and also campaigns, which were planned and executed with the software. The 2,300 client advisors can capture the responses from these campaigns and complement the customer contact history.

The ZKB OSV system is interconnected with ZKBDialog and provides, via Siebel Analytics, a useful instrument for sales operations. This system allows

to identify customer requirements and target groups of marketing campaigns based precise on sound analytical data.

Further areas where ZKBConnect has been implemented: handling of financing for private and business clients (FinPro), migration of a systems for money transactions (MBFG), and the sales application for securities trading (FeWe).

*"As the IT Portfolio Manager Sales, I expect external consultants to possess knowledge and expertise of the technology encompassing both sales and finance. ec4u delivered excellent support in the Siebel environment. I strongly recommend ec4u for when it comes to implementing a comprehensive Siebel CRM solution."*

Jürg Leutwiler, IT Portfolio Manager Sales, Zürcher Kantonalbank (2,300 client advisors)

Other processes like the deployment of the system's master data (master concept) were also integrated. By continuously developing the ZKBConnect platform into a comprehensive sales desktop ZKB has a central and exclusive CRM-System which owns a global view on all information and business processes of its clients.



## Benefits

- 360° view of all relevant information
- Faster completion of client-related activities
- ZKBDialog and ZKB OSV: central management and execution of campaigns as well as operational sales support
- ZKB FinPro: fast and standardized execution of financing processes
- ZKB FeWe: complete and comprehensive support of sales processes in securities trading
- ZKB MBFG: migration of the money inventory management system to a modern platform

## Technologies

- Siebel eFinance 7.5
- Siebel Marketing, Siebel Analytics
- Database: Oracle
- Hardware: IBM AIX
- Client-OS: Windows XPg

ZKBConnect is optimally integrated within the total process and data architecture of ZKB via online and batch interfaces. This ensures a high level of data consistency and helps avoid data redundancies. On the basis of Siebel eFinance 7.5.3.11, ZKBConnect provides continuous and smooth support of the client customer conversation and serves as a portal for all customer relating services – resulting in effective advisory services for hundreds of thousands of clients. ZKBConnect offers a 360° view of all client-based activities: administration of master data, overviews of all business category accounts, securities, loans, credits, meeting agendas, stock exchange and monetary transactions, capital investment planning, financing, ratings, client limits, client evaluations, etc. ec4u expert consulting ag assisted ZKB with competence during all phases of development of the initial ZKBConnect 1.0 platform, through to the recently deployed ZKBConnect 5.0 version. ec4u has played a major role in the success of ZKBConnect.