BANK FÜR SOZIALWIRTSCHAFT

INTEGRATED MARKETING, SALES, AND SERVICE FOR BANKS WITH SAP® CRM

"With SAP CRM now managing all communications between sales and our market service center, we're saving around €100,000 every year in this area alone."

Uwe Beister, Head of General Organization and the SAP CRM Project, Bank für Sozialwirtschaft AG

QUICK FACTS

Company
- Name: Bank für Sozialwirtschaft AG
- Headquarters: Cologne, Germany
- Industry: Banking
- Products and services: Full spectrum of banking services
- Total assets: €6.03 billion (2010)
- Employees: 313
- Web site: www.sozialbank.de (German)
- Implementation partners: SAP® Consulting and maihiro GmbH

Challenges and Opportunities
- Replace dated, proprietary customer information systems
- Integrate the SAP Customer Relationship Management (SAP CRM) application with the existing SAP ERP application and third-party software

Objectives
- View customer data from various perspectives
- Achieve transparency in customer-specific processes
- Provide IT support for active sales management
- Implement customer-specific management of tasks and appointments

SAP Solutions and Services
SAP CRM

Implementation Highlights
- Implemented all customizations requested by staff while staying within budget
- Completed project in 7 months
- Met with high user buy-in

Why SAP
- Customer's dedicated strategy since June 2006 to use SAP software
- Straightforward integration with the SAP for Banking solution portfolio

Benefits
- Customer information in a single overview
- Transparent processing statuses
- Faster, more cost-effective communication between sales and management
- Improved customer service thanks to optimal basis of information
- Efficient campaign planning
- Rapid assessment of customer profitability
- Minimal manual work and fewer errors
- Reduced process lead times

Existing Environment
- Microsoft Office products
- Text module management
- D3 document management system
- Andrena securities accounting software
- ZEB-Control contribution margin accounting software

Third-Party Integration
- Hardware: PCs, Windows-based terminals in Citrix/terminal server configuration
- Operating system: Windows

Bank
für Sozialwirtschaft

"We use SAP CRM to actively and efficiently manage our sales."

Uwe Beister, Head of General Organization and the SAP CRM Project, Bank für Sozialwirtschaft AG

www.sap.com/contactsap

Bank für Sozialwirtschaft AG (BfS), a credit institute headquartered in Cologne, Germany, specializes in banking services for public health and social services organizations and companies. Having witnessed dynamic growth for a number of years, BfS can now no longer function without modern sales instruments. The SAP® Customer Relationship Management (SAP CRM) application helped BfS gain a comprehensive view of its customers, clearly defined processing stages, and efficient sales management.

Total View of Customer

How high is a customer's contribution margin? What loan agreements are they involved in? What documents did they receive in the past 30 days? With SAP CRM, BfS employees now have the key customer information in a single application. The bank's customer data used to be scattered across a dozen software solutions. To obtain a holistic view of a client, sales employees had to log into multiple applications, jumping from one to the next. Communication between sales and the market service center (MSC) responsible for administration was a complex affair. BfS used to send around 100,000 pages in faxes every year – the method sales employees commonly used to commission MSC to generate customer contracts, for example. "Studies have shown that, all in all, a fax costs one euro," says Uwe Beister, head of general organization and the SAP CRM project at BfS. "With SAP CRM now managing all communications between sales and our market service center, we're saving around €100,000 every year in this area alone."

BfS implemented SAP CRM in early 2008 with the help of SAP Consulting. Another partner, maihiro GmbH, assisted with incremental process design and implementation. "Working with maihiro was great. We stayed within our budget while fulfilling all of our employees' customization requests – over a hundred of them," reports Beister.

Unprecedented Transparency

SAP CRM enabled BfS to achieve unprecedented transparency in its customer data and processes. The application is now integrated with the bank's document management system, which lets staff jump to letters, legitimation records, contracts, and other customer documents with a single click. Employees can now check current processing statuses, customer appointments, and even the expected potential of new business.

"We use SAP CRM to actively and efficiently manage our sales as well," Beister explains. With the application's opportunity management function, BfS manages leads and carries out sales analyses. Around 100 sales employees currently use SAP CRM at 10 BfS branch offices.

maihiro® enabling CRM

50 106 366 (11/08) Printed in USA.
©2011 SAP AG. All rights reserved.

SAP, R/3, SAP NetWeaver, Duet, PartnerEdge, ByDesign, SAP BusinessObjects Explorer, StreamWork, and other SAP products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of SAP AG in Germany and other countries.

Business Objects and the Business Objects logo, BusinessObjects, Crystal Reports, Crystal Decisions, Web Intelligence, Xcelsius, and other Business Objects products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of Business Objects Software Ltd. Business Objects is an SAP company.

Sybase and Adaptive Server, iAnywhere, Sybase 365, SQL Anywhere, and other Sybase products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of Sybase, Inc. Sybase is an SAP company.

All other product and service names mentioned are the trademarks of their respective companies. Data contained in this document serves informational purposes only. National product specifications may vary.

These materials are subject to change without notice. These materials are provided by SAP AG and its affiliated companies ("SAP Group") for informational purposes only, without representation or warranty of any kind, and SAP Group shall not be liable for errors or omissions with respect to the materials. The only warranties for SAP Group products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty.

THE BEST-RUN BUSINESSES RUN SAP™