



## Customer Service-oriented Bank achieves new milestones and improves sales management with BlackBerry solution

Volksbank Offenburg is a modern, customer-oriented financial institution with about 300 employees. As one of the five biggest cooperative banks in the region of Baden, Germany, Volksbank Offenburg focuses on customer satisfaction in order to ensure long-term competitiveness. The bank maintains its strong presence in the region through a branch network of eleven customer advisory centers, eight bank subsidiaries and six self-service centers.

### The Challenge

With the high number of service centres that Volksbank Offenburg operates, effective internal communications has proven to be a real challenge. The lack of unified communications channels, the use of too many media when sharing documents, and delays in the flow of important, time-critical information was inefficient to the daily work of its employees, and this was a particular problem when they were travelling and working out of the office.

Therefore, Volksbank Offenburg was looking for a mobile solution that would reconcile the benefits of the bank's strong local presence with the need for a central sales management and communications for both the bank's staff and the sales teams. Employees needed to be connected to the bank's IBM® Lotus Notes system and use email and calendar features as a standard communication channel, whilst on the move. They would also need access to information in the bank's CRM system such as price or condition changes in real time, quickly and from wherever they are.

For Volksbank Offenburg this meant it had to reorganise its operations from a traditional sales structure to a more process-based organisation. Only through transparency in all processes across the entire sales chain and management would the bank be able to see the progress and efficiencies they were looking for. "We were looking for a solution that would support us technically in transferring our existing sales structure into a process-oriented structure," says Markus Dauber, head of the Board at Volksbank Offenburg. "But it also had to guarantee maximum mobility and security, especially in the light of existing data protection laws, and be available at reasonable cost of investment."

### Benefits

Maximum mobility

High security standards

Easy implementation

Unified appearance of sales force



## The Solution

Today, Volksbank Offenburg uses BlackBerry® smartphones and BlackBerry® Enterprise Server. It also implemented a content management application called FlowGate, by GFI Informationsdesign GmbH, a member of the BlackBerry® Alliance Program. The solution brings together key functions from Lotus Notes and the bank's CRM database.

"BlackBerry smartphones combine the benefits of two different types of handsets," says Dauber, "meaning that the sales teams need only carry one device, rather than a mobile phone and a laptop computer."

The implementation of the BlackBerry® solution took place in two stages: first, employees were connected to the bank's Lotus Notes system via their BlackBerry smartphones. By using the push technology, emails, calendar entries and contacts are all automatically and wirelessly synchronized. Every member of staff now has access to the most up-to-date information and can communicate with colleagues securely, and schedule appointments at their convenience.

In the second stage of the implementation, the solution was enhanced by integrating the bank's CRM system and other databases such as the Notes-based price list in a mobile application. New contacts in the CRM system are now transferred to the BlackBerry smartphones regularly and employees are able to feed information back to the database via their devices too. The solution helps to close the gap between a centrally managed sales structure and the mobile employees in customer service.

## The Benefits

The BlackBerry solution has helped to improve the previously complex communications structure at Volksbank Offenburg. It not only saves the bank time and money, it also unifies the appearance of the bank's sales force, and supports the new sales structure.

"This new technology finally unites what was always meant to be one unit," explains Dauber. "Our existing work force is now coordinated and employed to an optimum."

By the middle of 2008, about 60 mobile workers were equipped with BlackBerry smartphones. In just a few months, over 5,000 conversations with customers were arranged systematically following the new sales process and several thousand products were sold. Sales success was fed back into the CRM system and the sales coordination teams via the BlackBerry solution.

"Today, all our sales representatives work with BlackBerry smartphones," continues Dauber, "the solution plays well to our company structure. Thanks to the well structured use of the BlackBerry solution, we did not even need any mobile CRM training for our staff."

"The use of BlackBerry technology is a milestone in process-oriented sales management," comments Dauber. "It is a fundamental pillar of our sales strategy."

[www.blackberry.co.uk/casestudies](http://www.blackberry.co.uk/casestudies)

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GFI Informationsdesign GmbH has been offering IT services and solutions since 1995. GFI supports customers across a wide range of branches.

Customers benefit from GFI's extensive knowledge, gathered over many years as partner of the major providers, as a business partner of IBM and of course as a member of the BlackBerry® Alliance Program.

Our know-how guarantees the required support during the implementation of your projects. GFI supports the customer from the consulting stage, via planning, implementation and integration right through to commissioning. Ongoing support and hosting can also be offered when required.

GFI FlowGate is the Content Management System for the BlackBerry® solution, enabling access to any database from a BlackBerry® smartphone. With GFI Flowgate you can have mobile access not only to your notes applications and relational databases but also to SAP.

Whether CRM, ERP, shop systems, contract and fleet management or any other application – with GFI FlowGate you can always have your resources "at hand", quickly, reliably, safely and presented in a manner suitable for all user groups.