SPARDA Bank improves cross-selling through social collaboration

A suite of CRM tools powered by IBM software enhances Web and mobile business processes.

Overview

The need

SPARDA struggled to share processes and knowledge among staff and needed to understand customers better to improve cross-selling.

The solution

Safebook social software for customer relationship management (CRM) from IBM® Business Partner INTRANET Software & Consulting GmbH improved communications and collaboration and provided a more complete view of each customer.

The benefit

With employees better able to understand each other, the bank's products and their mutual customers, SPARDA improved customer service and became more effective at cross-selling and up-selling.

SPARDA Bank Austria Süd is a retail bank with branch offices all over Austria. Its business is based on providing banking and financial services through bank branches, mobile sales and alternative channels.

Lack of collaboration limits efficiency

Tools for collaboration are especially important for geographically separated teams, branch offices and mobile selling. Because SPARDA's main tool for collaboration was email, staff found it hard to share sales processes, product knowledge and customer information. Many customers were one-product buyers, but this would change if SPARDA could identify unmet customer needs and close opportunities for up-selling and cross-selling. This led SPARDA to seek a CRM solution to transform its marketing and sales processes while adding collaboration and social capabilities.

Today SPARDA Bank enjoys more effective business processes and enhanced sales opportunities. "Our suite of social CRM tools improved internal creativity, efficiency, information sharing and collaboration. In addition to helping with product management and sales and marketing, social software improved customer service," says Dr. Carl Hofrichter, CEO of SPARDA Bank.

A CRM solution for sales and marketing

SPARDA sought help from IBM Business Partner INTRANET Software & Consulting GmbH, which implemented its Safebook software to improve customer relationship management (CRM) and online and mobile collaboration. Safebook's aim is to optimize SPARDA's communications and workflow processes in marketing, sales and service. Drawing from nine databases at SPARDA, the software promotes information sharing and collaboration among employees, customers and partners through tools such as Twitter-like feeds, a sales wiki, customer profiles and an engine to recommend services to customers. The software can be used to manage customers, sales accounts and product lines.

Safebook was developed using IBM Domino Designer 8.5 software with its XPages Web development framework. For security's sake, SPARDA deployed Safebook in a private cloud configuration implemented with IBM XWork Server software, an application server that also uses XPages technology.

More knowledge drives cross sales

Safebook software helped SPARDA improve internal communication to help employees better understand one another, their mutual customers and the bank's products. It enhanced customer service by increasing staff knowledge of each customer's products, needs and service histories. These benefits helped increase revenue because deeper knowledge led to more efficient cross-selling and up-selling.

Solution components

Software
- IBM® Domino® Designer 8.5
- IBM XWork Server
- Safebook from INTRANET Software & Consulting GmbH

Business Partner
- INTRANET Software & Consulting GmbH

For more information

To learn more about IBM Domino Designer and IBM XWork Server software, please contact your IBM marketing representative or IBM Business Partner, or visit the following websites:
- **ibm.com**/software/products/en/ibmdominodesigner
- **ibm.com**/software/products/en/ibmxworserv

To learn more about INTRANET Software & Consulting's Safebook software, please visit the following website: www.intranet-consulting.at

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