

Case study of the Baloise Bank AG

Boss Info has experience from many successful projects with banks and offers both standard integrations in Avaloq and Finnova as well as individual solutions for electronic archiving and content and document management. Scanning and OCR solutions round off the range and accelerate internal processes.

Easy account opening thanks to highly automated innovations

Baloise Bank AG is integrating a modern digital client onboarding system into its proven long-term archiving system. An intelligent solution with an enormous impact: Baloise Bank AG is setting new standards in digitalisation.

«Digital Client Onboarding» system as the next step in digitalisation

For many years, Baloise Bank AG has successfully been using our proven document management system (DMS) with «dg archive» for long-term archiving. Nearly a decade later, the journey toward digitization has advanced with the launch of a digital client onboarding system.

The goal was to offer customers a modern and simple way to establish a customer relationship and open an account independently and online – quickly, reliably and completely without paper documents. «We have been using dg archive as a successfully implemented DMS for many years. Evaluating and implementing a different DMS for ‹digital client onboarding› therefore made no sense,» recalls Therese Suter, project manager at Baloise Bank SoBa. «Instead, we aimed to build on our strong partnership with Boss Info and enhance the existing DMS.»

The solution for digital client onboarding

Since this was an extension of the existing solution, some of the proven business processes could be adopted. «The import of master data from our Avaloq Banking Suite banking software into the archive (using a certified adapter) has proven itself over many years.

We were able to access this master data to index the documents from the Digital Client Onboarding,» explains Therese Suter. Thanks to a Boss Info web service, the documents are transferred directly from the onboarding process to the archive server.

«With the Boss Info AnyAPP web service, we also have the option of connecting other applications to our archive system. Thanks to the scanning solution, new documents can be quickly and easily integrated into the process and archived in a timely manner.»

The documents created during the digital client onboarding process are stored securely and in compliance with the law directly in the document management system. All internal and external compliance requirements are thus fully met.



«We were very impressed by the great and flexible cooperation and it is a pleasure to work together on a project like this. The partnership in this project has also grown further.»

Therese Suter, member of the management team, project manager IT-Services

Initial investment pays off

The Solothurn-based company is reaping the rewards of its hard work and positive attitude towards innovation. With dg archive, Baloise Bank SoBa now has a powerful and cutting-edge tool at its disposal.

Replacing outdated technologies increases flexibility and dynamism within the company. At the same time, efficiency and quality have been improved by avoiding unnecessary, time-consuming process loops. «Today, we have a standardised customer/account opening process, regardless of whether the opening was carried out by a bank or insurance advisor,» explains Therese Suter, who is responsible for the project. «The web service works perfectly. The interval for the master data delivery was recently adjusted and a changeover from full to delta load was made. This means that we are even faster in archiving after completing the onboarding process, we are even faster in archiving,» concludes Therese Suter. And speaking of data volumes: by mid-May 2021, an impressive 97,694,749 documents had already been archived in dg archive.

About Baloise Bank AG: The best of insurance and banking

Baloise Bank AG, based in Solothurn, is firmly anchored in the canton of Solothurn. With the acquisition of Solothurner Bank SoBa – formerly Solothurner Kantonalbank – by the Baloise Group in 2000 and the subsequent implementation of the partnership-based business model, Baloise Bank AG gained access to a nationwide distribution network through the sales force of Basler Versicherungen.



More case studies

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