

Personalized customer experiences at Valiant with the BSI Customer Suite

Baden, October 29, 2025 – Valiant Bank AG has selected the BSI Customer Suite, which is a testimony to its embrace of a solution that combines data-based customer communication, regulatory security, and technological flexibility. With this state-of-the-art CRM/CX customer platform, the bank can launch teasers that are both personalized and tailored to a target audience in their online banking and mobile banking tools. BSI Software, the Swiss software company, guarantees data storage exclusively in Switzerland, which for Valiant is an important aspect of the collaboration.

Valiant is an independent financial services provider doing business exclusively in Switzerland. With total assets of over CHF 37 billion, more than 1,100 employees, and a strong focus on private and business customers as well as SMEs, it operates about 80 branch offices in 15 cantons. Valiant counts on state-of-the-art, data-based customer experiences as part of its digital development and has, on that account, made the decision to work together with BSI Software. In the context of its “Digital Market Development” project, the company displays targeted and personalized offers as well as in-depth information in its online banking and mobile banking tools, and the holistic BSI Customer Suite platform encompasses everything a bank needs for a compelling customer experience.

Configuration and low code facilitate an efficient launch

By selecting the BSI Customer Suite, Valiant is systematically advancing the digitization of its customer communication. The proof of concept (PoC) demonstrated early on that target groups can be selected precisely and personalized teasers can be displayed in real time with the flexible solution from BSI Software – either in the customer portal or in the online banking and mobile banking tools. Also important to note is that the campaigns are managed solely by configuration using the bsi.cx module.

“BSI Software met our data protection, compliance, and integration requirements in every respect,” emphasizes Christoph Wille, Head of Customer Services and Products. “We were particularly impressed with BSI’s high degree of banking industry expertise, the active interface to Finnova, and the professional cooperation coming from the BSI team.”

Project notes: A Teaser API as a building block for success

The teaser API the two companies developed together is a fundamental building block of the bank's "Digital Market Development" project. It facilitates the creation, management, and analysis of customer-specific teasers, pop-ups, and advertising banners in the mobile banking and online banking tools. In addition, target groups for the teaser API can be selected instantly using the data in the BSI Customer Suite customer platform. The teaser content can be designed for different target groups and can be called by the relevant front ends (mobile or online banking tools).

Customers can then navigate to the suitable sales or consulting processes in the BSI Customer Suite with a single click. Additionally, it is conceivable in the future to implement the option of fully automated follow-up processes through the customer platform with the help of AI agents. On top of that, the solution quantifies critical key indicators such as views and clicks, which is a valuable basis for targeted cross-selling and upselling. In the future, the "Teaser Management" element, which facilitates innovative processes without any programming effort, will even be available for banks to download directly through the BSI Customer Suite.

"We can now do things fully with configurations and low code that used to be possible only with a lot of Java code," explains René Konrad, Community Manager Banking at BSI Software. "Our project with Valiant demonstrates very well how efficiently cutting-edge campaign management can be implemented in banking."

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About BSI Software

BSI Software is a leading European provider of software solutions for Customer Relationship Management (CRM) and Customer Experience (CX). The company's BSI Customer Suite supports businesses in regulated industries, such as banking, insurance, retail, and energy and utilities, with the holistic design of digital customer relationships along the entire customer journey. In the DACH region, BSI Software is the market leader in its focus industries.

The modular, scalable, and holistic customer platform provides comprehensive functions for marketing automation, sales support, and service processes – they are AI-based, compliance-conforming, and technologically a cut above. Also included are the AI-powered BSI Companion, the CRM solution with a generative 360° customer view, and automation using agentic AI. Thanks to BSI's multi-cloud strategy and model-agnostic approach, companies retain flexibility when it comes to selecting their infrastructure and AI models.

BSI Software combines technological expertise with an in-depth industry understanding. Customers include well-known companies such as ADAC, Hornbach, Techem, PostFinance, Raiffeisen Banking Group, and Signal Iduna.