

Swiss banks and modern customer relationship management

PostFinance and Migros Bank deepen their partnership with BSI Software

Baden, August 04, 2026 – PostFinance and Migros Bank, two of Switzerland’s most recognized retail banks, are expanding their partnership with BSI Software and are adopting the BSI Customer Suite. Developments in the banking sector highlight the potential that arises when CRM, marketing automation, and AI-supported processes are unified within a single CRM/CX platform rather than operated as standalone functions.

PostFinance: A strong commitment following nearly 25 years of collaboration

PostFinance, the number one in Swiss payment transactions, decided in the spring of 2026 to adopt the BSI Customer Suite following a thorough evaluation. A fit-gap analysis had indicated that the BSI Customer Suite already meets nearly all defined requirements in its standard product. One key advantage is the solutions’ high level of configurability, enabling internal teams to independently configure and enhance applications and processes, thereby laying the groundwork for greater speed and flexibility.

PostFinance and BSI Software are bound by a partnership spanning nearly 25 years: The bank has worked with individual BSI Software solutions since the late 1990s. Today, approximately 2,500 PostFinance employees already rely on the Swiss software company’s central CRM system – including retail and business customer advisory teams and seven contact centers supporting customers in three different languages.

The bank’s goal is to ease the burden on customer service teams and enhance customer satisfaction. In addition, the solution’s intuitive presentation of complex customer structures is intended to reduce training efforts and help employees advise customers more quickly, more effectively, and based on a comprehensive overview.

Decision to adopt the BSI Customer Suite as a SaaS solution

About five years ago, the bank added a marketing automation solution: It orchestrates which products are offered to which customer at what point in time, qualifies leads, and delivers personalized content to the e-banking portal based on customer behavior and profile. An independent vendor screening led PostFinance to replace its existing marketing automation and CRM solutions with the BSI Customer Suite as a SaaS (Software-as-a-Service) platform. “PostFinance strives for maximum impact in its digital engagement. BSI CX supports our objective of engaging customers in a personalized manner, with the right content and at the right time,” says Vassilki Paidoussi, PO Customer Experience at PostFinance.

Migros Bank enhances its holistic financial advisory – and customers benefit from personalized solutions

Migros Bank implemented the BSI Customer Suite in 2022 to elevate the quality of its advisory services and systematically align them more closely to the individual life circumstances and needs of its customers. At the center is the newly developed “customer-centric advisory compass,” designed to deliver structured, personalized, and holistic financial guidance. This digital solution helps advisers keep customer data up to date, consider and accommodate each customer’s goals and preferences and provide targeted and tailored financial solutions. At the same time, cross- and upselling opportunities are systematically highlighted to present tangible, relevant solutions to customers.

The results speak for themselves: Within six months of implementing the new advisory approach, the Net Promoter Score — a key indicator of customer satisfaction and willingness to recommend — rose by 33 percent, making it clear that customers experience Migros Bank’s personal and holistic advisory approach as meaningfully more valuable. In addition, the bank was able to increase the number of additional leads generated from advisory meetings with customers by 35 percent, while cross- and upselling during the advisory process surged by an impressive 70 percent. Thomas Kofler, Program Manager at Migros Bank, explains: “As a responsible bank, Migros Bank is committed to helping people manage their finances in the best possible way and supporting them with suitable solutions at every stage of life. With a strong commitment to holistic financial advisory, Migros Bank not only contributes to the financial competence of its customers, but also to the overall quality of life in Switzerland.”

For René Konrad, Community Manager Banking at BSI Software, both success stories lead to one clear conclusion: “Swiss retail banks are proving what can be achieved with a unified CRM and CX platform. The results are compelling, and they are applicable to other markets.”

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.

About PostFinance

PostFinance is one of Switzerland’s leading financial institutions. As a diversified, innovation-driven financial service provider, it delivers fresh solutions and smart financial innovations to its customers. It relies on future-focused tools and technologies developed for the Swiss market or specifically adapted to it. The needs of its customers are always at the heart of PostFinance’s approach.

About Migros Bank

Migros Bank is a wholly owned subsidiary of the Migros Cooperative Federation and, as such, is not publicly traded. This allows it to focus fully on creating customer value rather than on share-price performance. With about 2,000 employees and 70 branches providing holistic financial advisory services across all regions of Switzerland, the bank is both broadly networked and strongly rooted locally. As the country’s sixth largest bank, Migros Bank bears substantial responsibility toward the environment and society - and consciously lives up to this responsibility.

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