



Zuger Kantonalbank digitises its customer advice service with a tablet-based consulting tool from Swisscom

Customer advisers at Zuger Kantonalbank are now being supported in their work by a digital assistant: the tablet-based eVoja consulting tool from Swisscom, which connects directly to the Finnova banking system. Customer advisers can use the new technology to respond immediately to customer requirements and visualise a variety of different solutions.

The customer advisers of Zuger Kantonalbank hold more than 10,000 customer meetings every year. For a short time now, they have been supported in these meetings by a digital assistant, eVoja, which enables interactive consulting in the fields of basic, needs identification, financing, pensions and investment. An adviser workstation is provided for preparing and post-processing the meetings. The tool can be used either as an iOS app or an HTML5 client with limited functionality at the PC workstation. Pascal Niquille, President of the Zuger Kantonalbank board, is delighted with the new solution: "eVoja is enhancing our advisory service. It is also shortening the pre-processing and post-processing time for advisers by giving them direct access to all the information they need on the tablet."

Investment proposals with swissQuant

As part of this project with Zuger Kantonalbank, Swisscom has enhanced its investment module and integrated ImpaQt, a risk management tool developed by swissQuant, which recently scooped the award for the best portfolio management system for private banks and wealth managers at the WealthBriefing European Awards in London. In consultation with the customer, the adviser first determines the risk return profile and then creates a bespoke investment proposal on the tablet for the individual customer. Together with the customer, the adviser simulates projected future success and visualises development of the assets in a clear, easy-to-understand format. The customer also benefits from continuous monitoring of their portfolio and regular personalised investment advice.

Supporting several banks

Swisscom's eVoja consulting tool is also in use at Schwyzer Kantonalbank, among other banks. Parts of it (Credit Master FinancialCockpit) are also in use at Graubündner Kantonalbank. Appenzeller, Nidwaldner, Obwaldner and Urner Kantonalbank also opted for eVoja at the end of 2016 and are in the process of



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rolling out the basic and investment modules. At all of these banks, Swisscom has connected eVoja to the Finnova core banking system using (bidirectional) interfaces.

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