



Customer

- DAB bank AG

Sector

- Banking and financial services

Initial Situation

- Siebel Call Center
- Siebel Marketing
- Technical/graphical preparation of services-related correspondence via Siebel and legodo

Role of legodo

- Manufacturer and supplier of the software
- Siebel consultant for DAB bank
- Technical consultant and trainer

Advantages

- Integrated across-the-board processes for services and quotations in Siebel and the legodo software.
- Minimized maintenance of templates and textual building blocks by the technical department



The DAB bank AG banks on legodo

Seamless integration of documentation into the DAB bank's business processes boosted the quality of sales and advisory services, while markedly improving customer service processes.

The DAB bank has the key competitive advantage of being able to address such diversity through customized solutions for private and commercial clients, whether novices, pros, traders, or savers.

Brief Profile of DAB bank AG

The DAB bank AG (www.dab-bank.de) is Germany's and Austria's leading direct bank that trades securities for both private and commercial clients. As of June 30, 2007, the bank managed 1,085,324 portfolios corporation-wide, representing assets of € 32.84 billion. Established in 1994 in Munich as Germany's first discount brokerage, the DAB bank serves a broad spectrum of target groups with a diverse range of high expectations.

Requirements and Targets

Customization is the keyword in the banking sector that makes its mark in the highly competitive field for optimized and integrated communications.

The bank's existing system, however, was no longer able to handle the high demands placed on customer services. Hence, a critical prerequisite of a solution was the integrating of documentation into existing CRM processes, supplemented by clarity, reproducibility, and constant control to ensure sustainable superb quality. Only through sustained high standards of quality for services-related correspondence and good customer care can one enhance customer satisfaction and retention.

The decision to go for legodo was easy – because C4 guaranteed a uniform standard for corpo-

rate communications and corporate design in all dealings with the bank's clients.

Value added by legodo

The integration of documentation into the business processes helped optimize not only sales and advisory services, but also customer service processes.

legodo supports about 250 users at DAB bank AG, mainly through centrally administered textual building blocks and templates for responding via a host of output channels to a diverse range of enquiries for services. Such multi-channel support encompasses letters, e-mails, and faxes.

Automation minimizes the banking personnel's effort to write and maintain services-related correspondence. The system includes functions to automatically compose customized correspondence, assign the salutation by type of portfolio and client, filter templates by case, and comply with information-based rules for signatures.

Thomas Hamele - CRM & Analytics Manager

„legodo won us over right from the start and we are happy with the solution. In particular, we are pleased that legodo is always on top of our growing needs.“

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