



Excellent customer service at UBS with IBM Infoprint Customizer.

Bank customers are very discerning

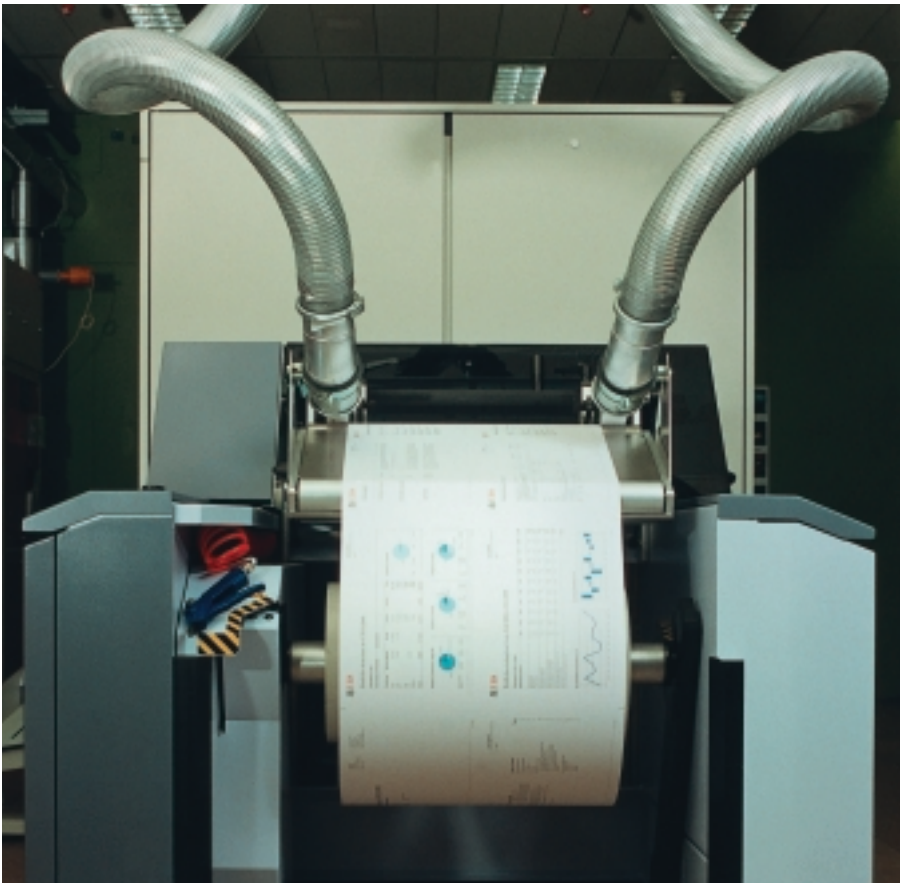
In addition to high-quality advice and an excellent return on their investments, they take it for granted that they will be supplied with first class, individual and totally accurate information about their financial affairs.

Roughly two years ago, UBS, a major Swiss bank, began looking for a system to transform the bank's routine status reports into top-quality marketing tools for selected client segments.

The specifications for the project placed very high demands:

- The production of clear and informative, full-colour customer statements.
- More information and more individual advice for each customer through the use of mined data to create the customer's customised financial statements.
- At the same time, UBS attached prime importance to speedy, reliable production and to the data in question being treated with absolute confidentiality.

Application	In-house, database-driven, compilation and composition of high quality customised colour statements
Software	IBM OS/390 IBM PSF for OS/390 ISIS-Papyrus/POSY
Hardware	IBM Infoprint Color 100. Hunkeler roll-on/roll-off pre- and post-processing equipment. Kern MM 4000 Pinless
Service	IBM hardware- and software implementation services. Education



*High-value statements
printed full colour in a
roll-to-roll production
environment*

Increased customer retention and business success for UBS ...

Four partners were shortlisted for the implementation of this project, but after an extensive evaluation IBM emerged as the only viable candidate. Raffael Negri, an external consultant with overall responsibility for the realisation of UBS's "Colour Printing and Infrastructure" project, sums up the reasons for this as follows:

"IBM was the only vendor capable of implementing Advanced Function Presentation (AFP) printing in colour with variable data, and without blank pages. While at the same time meeting our stringent requirements with regard to the stability and security of the system as a whole."



*Raffael Negri,
Project Leader "Colour printing and
Infrastructure"*

The system was installed in April 1999 and consists of the following main components

- IBM Infoprint Customizer for Statements with ISIS-Papyrus/POSY Color AFP software

- Hunkeler roll-on/roll-off pre- and post-processing system
- IBM Infoprint Color 100 full colour printing system
- KERN MM4000 Pinless

Since all the printouts are collected on the roll, no pages are lost en route to further processing and data security is ensured, since it is virtually impossible for an unauthorised person to gain access to individual documents on the roll.

Another advantage of roll printing is

- The system prints colour control strips on the paper margin, which are trimmed prior to feeding on to the roll; these strips are used for colour control of the printouts in progress. This saves time and money, since the colours are checked without having to stop the machinery. Thus, the possibility of printing errors as a result of incorrect colour calibration is avoided.

The page-oriented Rip'n'Print concept ensures highly reliable production. In other words, each individual page of a document is ripped and then printed immediately – unlike the conventional PostScript system in which a complete document is ripped and then sent to the printer. The advantage is that when problems arise with the print output not more than one page has to be ripped again – a major time saving. There is also a convenient and highly positive side effect: the status of each individual printed page can be interrogated and logged by way of the bidirectional printer control.

Project implemented successfully and on time

Following the pilot phase, which lasted just under six months, the fully integrated solution was completed successfully and managed in close collaboration with IBM. The system went into full operation at the end of 1999. The solution includes IBM Customizer for Statements, Hunkeler roll-on/roll-off pre- and post-processing equipment, software integration with UBS's data files and ISIS-Papyrus.



*Ruth Brodmann,
Associate Director Marketing Support,
UBS*

Everything was completed successfully and on time, as Ruth Brodmann, who has the total responsibility of the business aspect for customer statements, explains:

"The system met our expectations in full. We wanted to improve the content and visual impact of our customer statements substantially. The project has been a total success. We have succeeded in transforming the one-dimensional, black and white result reports into attractive, active reports. Feedback from our customers, who are receiving their investment statements in the new form for the first time this year, confirms that we have achieved this goal."

...thanks to IBM's Infoprint Customizer solution

“For our customers, the report represents a performance overview for an entire year. Accordingly, the form and content of this report are of prime importance in terms of customer satisfaction.”

Ruth Brodmann, Associate Director PB Marketing Support UBS. Overall Responsibility of business aspect for customer statements

A number of extra benefits add to the overall satisfaction with the IBM Infoprint Customizer solution. Although the main function required of the new system is the compilation of top-quality, customised customer statements, the system is so flexible that it can be used in the future for numerous other UBS printing projects.

The IBM Infoprint Color 100 prints out not only variable AFP data streams in full colour; it can just as effectively process PostScript Level 3 data streams and thus all the printing tasks involving desk top publishing systems at UBS. The range of applications of the new system is therefore very broad: from high-grade one-off items, of which the customer statements are an example, to the produc-

tion of brochures, bulk letter mailing and product folders, all produced on demand providing the benefits of forms storage elimination, obsolescence, and version control.

Conclusion

The UBS concept of using state-of-the-art technology to optimise its consultative and customer care services for selected customer segments and to increase customer satisfaction has been an unqualified success. The partnership with IBM has resulted in a dependable, on-time solution which has functioned smoothly since the first day of production and more than fulfilled the bank's original expectations.





© Copyright IBM Corporation 2000

IBM Germany
Informationssysteme GmbH
70548 Stuttgart

The IBM home page can be found on the Internet at
www.ibm.com

IBM and the IBM logo are registered trademarks of
International Business Machines Corporation.

Registered trademarks of other companies/
manufacturers are acknowledged.