



# Case Study

“With New Access, we share the same vision and approach to what defines a modern private bank.” - Sonja Colli, Deputy General Manager, Chief Operating Officer, UBI Banca International S.A.

## Objectives of the New Access solution

- Support the proactivity of the customer service team in order to maximize results relative to market potential and expectations
- Gain in transparency and efficiency for the benefit of clients
- Support the bank's individual processes and portfolio management activities
- Centralize information for improved risk management
- Increase reporting efficiency

## Solution

- Branch, the New Access CRM tool, to manage all of the bank's private and corporate clients
- Equalizer, the New Access portfolio management system, to manage all client portfolios
- Equalizer Web, to assist managers in their client communications
- Logical Access Suite, to store all new account documents

All tools are integrated at the Branch solution level, to maximize the system's efficiency and ease of use.

## Benefits of the New Access solution

- A shared vision of what defines a modern private bank
- Helps differentiate the bank from its competitors, to better attract and retain clients
- Frees managers from technological complexities
- Greater simplicity and speed, allowing the bank to be more responsive to client needs and provide better service
- Centralized and traceable information enabling faster response times to requests from authorities
- A very good analysis of the bank's business needs allowed the team to deploy the right solution
- A responsive, flexible and solutions-oriented team, always present at critical moments
- Fast deployment, especially compared with the other solutions considered
- A reasonable cost



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### **UBI Banca International S.A.**

Based in Luxembourg, UBI Banca International S.A. handles the private and corporate banking activities of the UBI Banca Group. In 2011, in deciding to aim for excellence in the management of its client relationships, the bank decided to modernize its IT systems. “We reviewed our systems and analyzed their degree of alignment with the core business of the bank,” explains Sonja Colli, Deputy General Manager, Chief Operating Officer. “We decided to purchase a new customer relationship management and portfolio management solution, so that our teams would be able to best take advantage of the market’s potential and expectations. After evaluating several solutions, we decided that the New Access suite provided the best response to our needs. From the very first workshops, we were impressed to discover that both teams had the same approach and vision of what defines a modern private bank.”

UBI Banca International S.A. uses Branch to manage its entire private and corporate client base in Luxembourg and Logical Access Suite for secured storage and management of all new account documents. In addition, Equalizer helps the asset management team to manage client portfolios, with performance analysis, rebalancing, order management and simulations, and Equalizer web assists managers with their client communications by giving them access to performance analyses, order summaries, and a client dashboard.

New Access specializes in Front Office solutions, and UBI Banca International S.A. focused its choice of systems on the front office, namely on its capacity to further improve the customer experience and thus to create real differentiation. “It is much more strategic to invest in the area where we can truly set ourselves apart,” confirms Mrs Colli. “This shared vision was key in our decision to work with New Access, and in the success of the initiative.”

All the solutions chosen respond to this same strategic vision and to the aim of reducing technological complexities. “We have gained much greater simplicity and responsiveness by centralizing all the information,” explains Marc Leyder, Project Manager.

In addition, the New Access consultants are experts in both IT and private banking, allowing them to tailor the architecture of the solutions to the bank’s business processes and to the needs created when new regulation comes into force. “In the long term, for Basel III as for FATCA, this will be extremely important for us,” illustrates Mr Leyder. “The solution will allow us to always remain in conformity with the directives.”

Above and beyond the power of the solution, it is New Access’s philosophy to always maximize their clients’ capacity to attract and retain their customers which made the difference. “We set four objectives in our new customer relationship management strategy,” recalls Mrs Colli. “First of all, we wanted to equip the Front Office with a solution that would give us better visibility and efficiency, for the benefit of our clients. Then, we wanted an easy-to-operate portfolio management solution to support our specific processes and activities. Third, we wanted a more integrated set of solutions to simplify risk management. Finally, we wanted to pave the way for the development of more efficient reporting. New Access enabled us to meet all four objectives and offered by far the most competitive proposal in terms of cost.”

The implementation went very well overall, and whenever problems appeared, New Access deployed all the appropriate resources to solve them. “The New Access team did a very good job of analysis and documentation, and, during implementation, they showed great flexibility and responsiveness to quickly get things back on course when necessary,” sums up Mr Leyder. “We also very much appreciated New Access’s willingness to pass their knowledge on to our teams, which means we’re now capable of installing updates ourselves with just telephone support from New Access,” adds Mrs Colli.

A second phase is now underway: the improvement of reporting to provide clients with more frequent, clearer and more personalized reports, while making internal control over asset management easier. “The advantage of working with New Access is that they always come up with a solution and that they are always ready to adapt their product to our evolving needs,” concludes Mr Leyder.



**newaccess**  
banking software

**UBI**  **Banca International**

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### **UBI Banca International S.A.**

With international expertise developed over more than ten years of business in the Luxembourg market, the Bank is today at the heart of the majority of cross-border transactions generated by UBI Banca group, a multi-regional group deeply rooted in the Italian economic landscape. The range of products offered extends from traditional lending activities and banking services to personalized private banking, merchant banking and fiduciary/trust agreement services created to meet the core needs of private and business clients in their cross-border activities.

UBI Banca International S.A. is unreservedly committed to developing long-term relationships based on trust and to providing their customers with exceptional, highly personalized service. Backed by their extensive international experience, the multilingual staff of UBI Banca International S.A. advise their international clientele on a one-to-one basis, representing some 50 countries around the world and with total assets of more than €3 billion.

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