

## Swiss Bank Leverages Veeting for Growth Strategy

### Overview

VermögensZentrum (VZ), a Swiss banking institution, has a 25-year history of delivering expert advice on wealth and asset management, retirement and estate planning, and a full range of financial services to satisfied clients. More than two dozen branch locations across the country serve corporate and individual customers, and the institution also maintains an asset center in Munich, Germany.

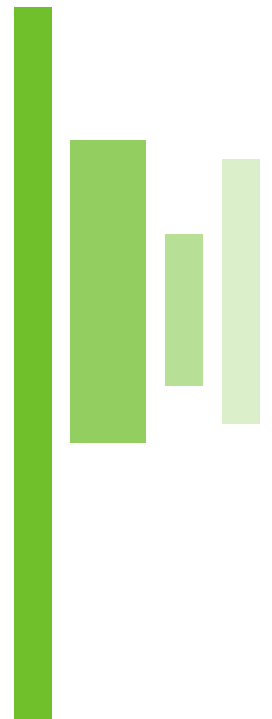
### Challenge

VZ wanted to build on its strong reputation and flourishing business model by expanding to new service areas both within Switzerland and beyond the country's borders. However, high costs for building brick- and-mortar branches for each service region posed a problem. The nature of the geography in Switzerland meant that populations in mountainous areas would be difficult to reach. Travel from these remote areas to an available branch was a significant obstacle. Building new branches within a short distance of each remote village would be financially draining.

Even existing customers sometimes found it inconvenient to visit a branch to consult with their advisors in person.

### Key Benefits

- Intuitive, user-friendly interface eliminates the need to train clients and consultants to use the system.
- One-to-one functionality ensures private, secure consultations at the client's convenience.
- One-to-many functionality supports marketing and business growth through delivery of educational webinars.
- White board and screen-sharing features allow consultants to demonstrate ideas and concepts in real-time.
- Anywhere/anytime capabilities curtail the need to build physical facilities, greatly reducing costs and accelerating the business-growth timeline.



## Solution

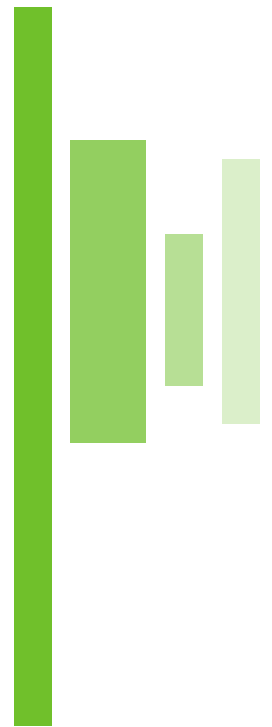
The Veeting Rooms web-based videoconferencing application was chosen as the ideal solution to engage existing customers and attract new clients. Unlike other options the firm researched, Veeting was flexible and provided a wide range of services. As an agile and customer-focused company, Veeting was able to move swiftly to understand and implement the solution required to meet VZ's needs.

Implementation required no integration, and consultants were able to begin using the WebRTC platform immediately. They quickly found that it was ideal for serving elderly customers who found travel difficult. All the consultation activities that had been done in person could be accomplished in online meetings. In addition, experts on specific topics could be conferenced in from other branches, increasing client access to an even higher level of service.

VermögensZentrum plans to roll out the Veeting solution across all branches, so that every consultant and client has the option of interacting conveniently and securely in virtual meeting rooms. Since the technology is run completely online with no hardware to purchase or software to install, scaling will prove fast and simple.

*"VNow, clients can choose how they want to interact with us. We will also be able to expand in Switzerland and into other countries much faster than building branches on the ground."*

— Shun Chao Guo, Project Manager VZ



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