

# CRM Training

December 10, 2024

# Project status and activities until go-live

## Go-Live decision:

- Postponed to Wednesday, December 11
- Q&A Sessions might be postponed depending on that decision

## Ongoing activities:

- User training
- Final confirmation of data migration
- Re-testing of critical bug fixes

# Training objectives

## Training objectives

- Bring you up to speed on the new solution by **focusing on the changes compared to the current solution**
- This is
  - not a general CRM training
  - not a MSD CRM training

## Training material:

- Training is recorded and will be made available through Helpdocs (see Windows Start-Button)
- Support:
  1. Team
  2. Power Users
  3. IT-Support
  4. Ambit

# Training scope

CRM Basis	Accounts and Contacts	Opportunities & Holdings	Client Interests & Preference Center
Campaigns and Mailings <small>Journey, Events, Mailings</small>	Client Insights	Outlook Integration	Copilot & Intelligence
Technical Integrations	ESG Solution	Mobile Access	Outlook 2025
Support			

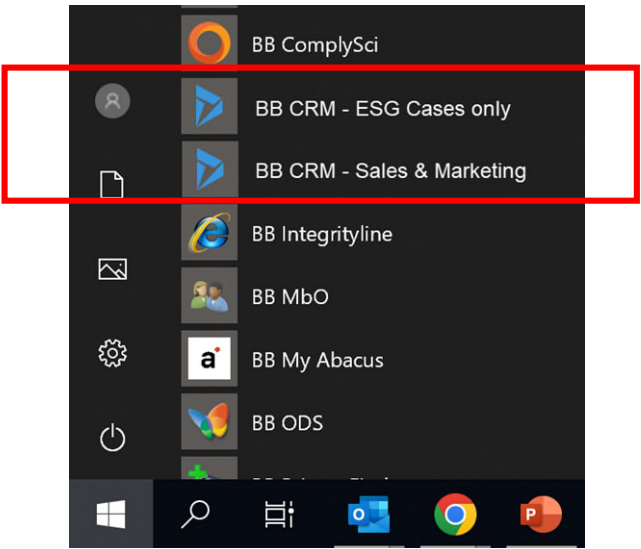
# CRM Basis

# Scope of new CRM

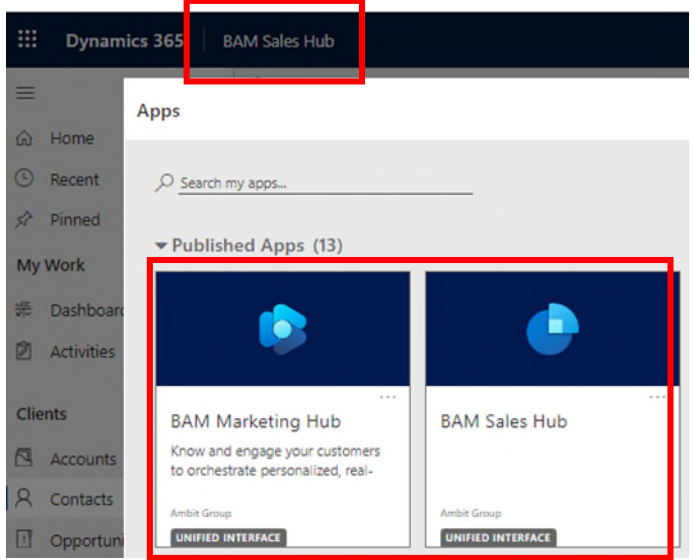
- CRM with pure Client Fokus
  - CRM is primarily for Sales and Marketing
  - and for users with sales activities or sales support
  
- New Solution to come in 2025 für PMs
  - PMs to continue using current application until then

# How to start

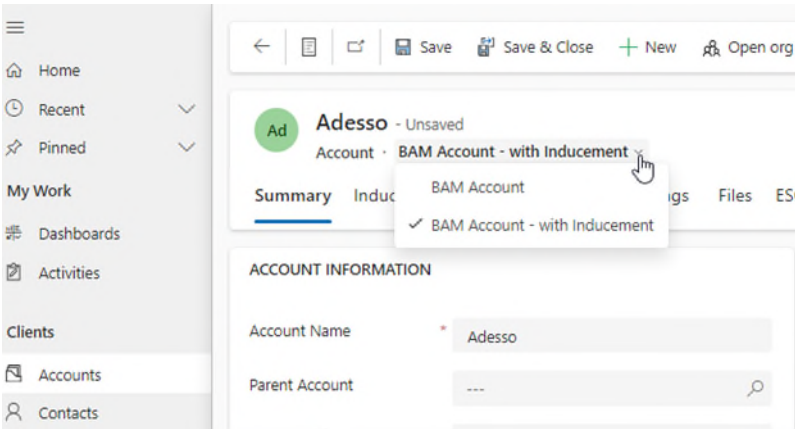
Start the CRM



Select Application



Select Account Screen



# CRM Teams and Users

- Teams define data access (accounts, contacts, .....)
  - Bellevue UK
  - Bellevue (Rest: CH, EU, Asia)
- User roles define functionality
  - Sales Manager: Sales team
  - Marketing Manager: Marketing team
  - Team Member: Rest of CRM users
  - Power User: CWR, GWA, STI

## Power Users

- Maintenance of master data (Funds, Shareclass, Interests, Mailings, Employee profiles with Photos, etc.)
- Bulk upload

## Team Member license

- Limited license; can't create new Accounts
- Cost 10% of a Sales Enterprise license



# Accounts and Contacts

# Account Management

## Account:

- Account Status automatically derived based on open and closed Opportunities and Holdings
- BB Biotech Representative for more flexibility in mailings
- Region based on publicly available ZIP code information

## Account relations:

- Competitors
- Recommendation List
- Account hierarchies and aggregation of opportunities and holdings

## Other to point out:

- Search requires the use of wildcards «\*»
- Migrated activities show the Created date, not modified

- <https://postleitzahlenschweiz.ch/tabelle/>

# Contact Management

- New: Relationship Manager for Mailings
  - Users and their Territory
  - Contact Manager vs. Deputy vs. Relationship Manager

# Opportunities & Holdings

# Opportunity Management

- Enter volume or quantity  
→ Calculation of the other based on **current NAV**
- Probabilities: 25%, 50%, 75%
- Won converts Opportunity to Holding
- Rationale for lost opportunities

# Client Interests & Preference Center

# Interest catalog

- Campaigns and Mailings are based on Interests
- Marketing List are discontinued
- Interests:
  - Mailings
  - Topics
  - Products / Shareclasses
  - Soft Topics (Legacy from migration)
- **KEEP INTERESTS UPTODATE !**
- **DO NOT ASSIGN SOFT TOPICS !**  
Rather eliminate them.

## Mailings:

- Bellevue Product Update Retail
- Bellevue Product Update Professional
- Bellevue Product Update Individual
- BB Biotech Factsheet
- Bellevue HC Trust Update
- BB Biotech NAV Daily
- BB Biotech NAV Weekly
- Bellevue Corporate News
- BB Biotech Corporate News
- Events
- Social Events
- Newsflows
- Webinar
- Healthcare in a nutshell

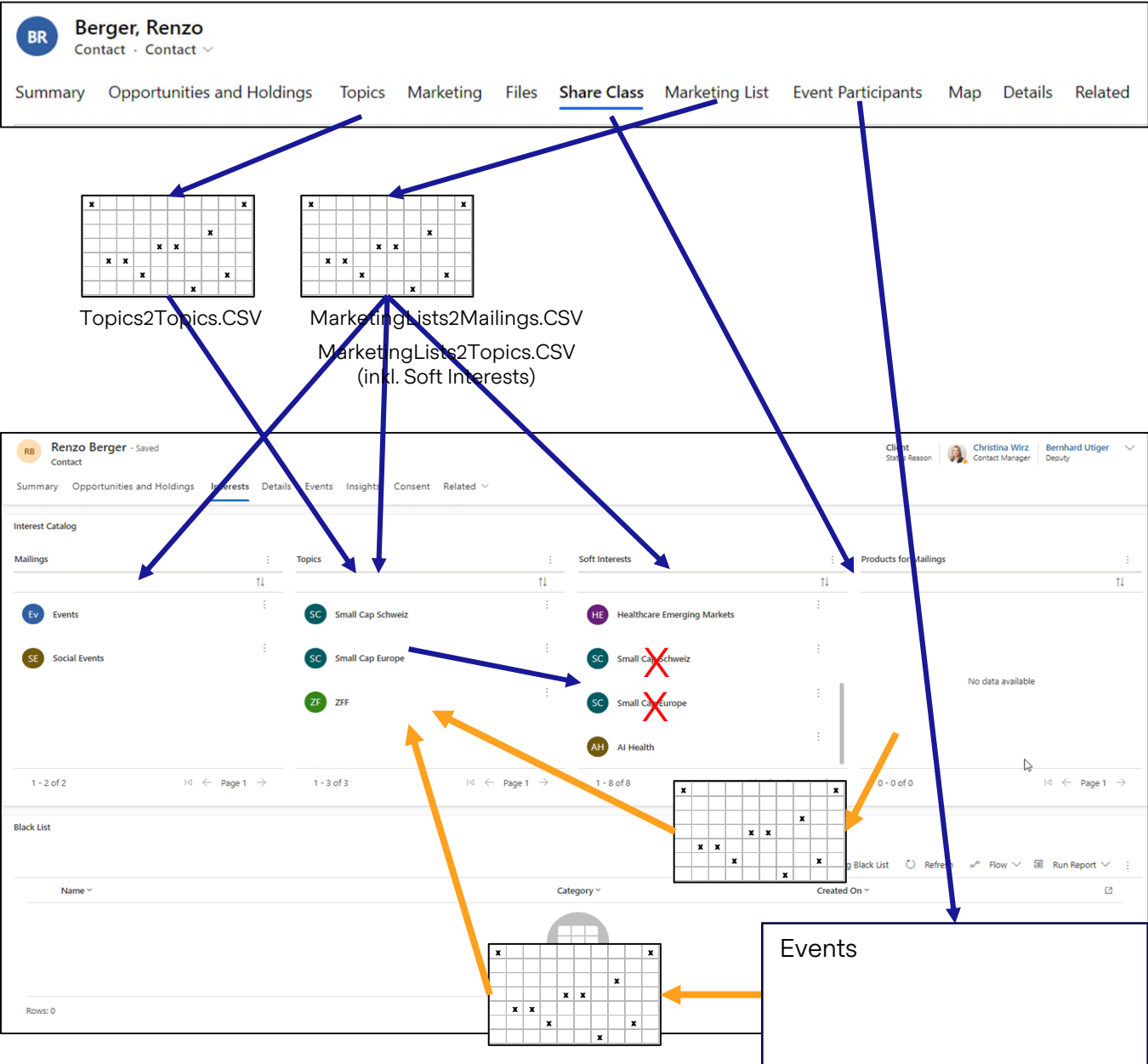
## Topics and Soft Interests

- Biotech
- Medtech
- Digital Health
- AI Health
- Obesity
- Healthcare Diversified
- Healthcare Strategy
- Healthcare Sustainable
- Healthcare Asia Pacific
- Healthcare Emerging Markets
- BB Biotech
- Healthcare Trust
- Small Cap Schweiz
- Small Cap Europe
- Private Market
- Alternatives
- Bonds
- Multi Asset
- Fasnacht
- Golf
- ZFF

# Migration to Interests

Blau: Migration  
Go-Live

Orange: Migration  
nach Go-Live





# Mapping Sample – Marketing List

Marketing List (Welche Marketing Listen sind noch aktiv und sollten in Interessen gewandelt werden?)	Product Update Retail	Product Update Professional	Product Update Individual	BIO_News	BIO_Reports	Bellevue HC Trust Update	BIO_NAVdaily	BIO_NAVweekly	Bellevue_News	Bellevue_Reports	Healthcare Observer	Biodelays Schweiz November 2024	Biodelays Deutschland 2024	Medtech & Services Investors Lunch Zurich 27.08.	Medtech & Services Investors Lunch Geneva 12.01	Medtech & Services Investors Lunch Lugano 12.01	Milano 16.5.2023 Medtech	Global Macro/Income - Lunch Event Zurich 18.01.	Global Macro/Income - Lunch Event Geneva 25.01	Global Macro/Income - Lunch Event Lugano 23.01	Bellevue Healthcare Breakfast/Lunch 7.11.2024 B	AI Healthcare Target List	
<b>Mailing</b>																							
Mailing - Bellevue Product Update Retail	x																						
Mailing - Bellevue Product Update Professional		x																					
Mailing - Bellevue Product Update Individual			x																				
Mailing - BB Biotech Factsheet				x																			
Mailing - Bellevue HC Trust Update						x																	
Mailing - BB Biotech NAV Daily							x																
Mailing - BB Biotech NAV Weekly								x															
Mailing - Bellevue Corporate News									x	x													
Mailing - BB Biotech Corporate News				x	x																		
Mailing - Events												x	x	x	x	x	x	x	x	x	x	x	
Mailing - Social Events																							
Mailing - Newsflows																							
Mailing - Webinar																							
Mailing - Healthcare in a nutshell											x												
<b>Topic (Gibt es neue Topic und solche die es nicht mehr geben wird?)</b>																							
Topic - Biotech							x	x															
Topic - Medtech																							
Topic - Digital Health																							
Topic - AI Health																							x

# Blacklist

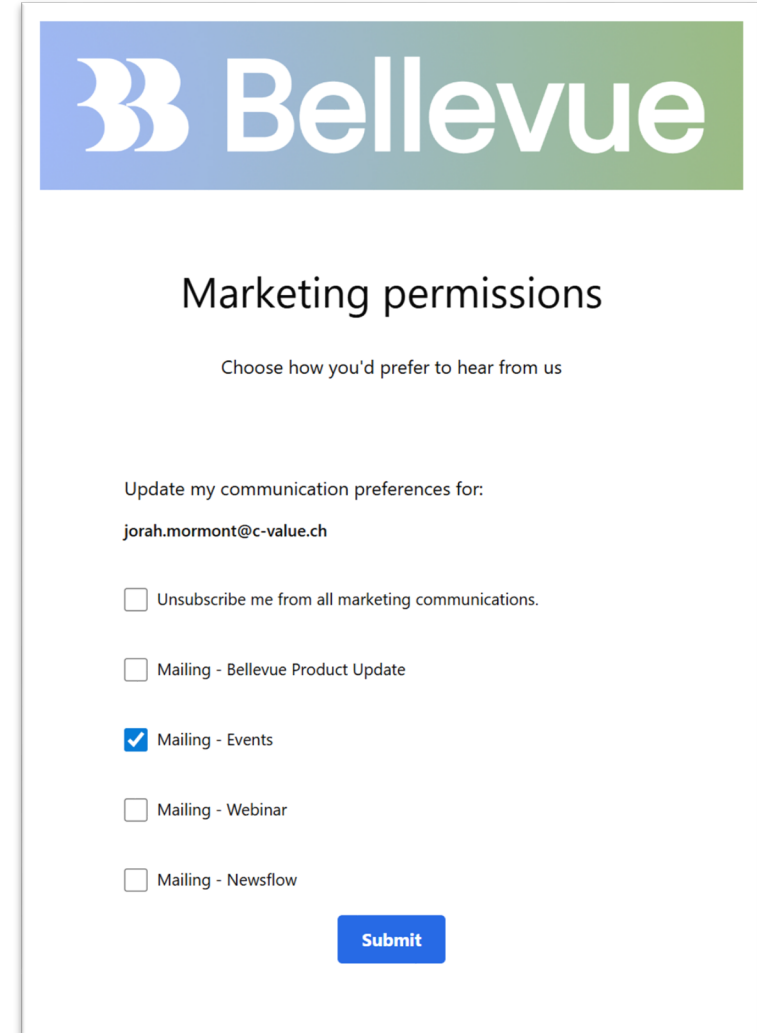
- Same mechanism as Interests, but «negative»
- Mailings and Topics can only be added to either Interests OR Blacklist
- You must first explicitly remove the item from one list before adding it to the other
- No validation when time of sending
- Mails are sent based on Interest catalog

# Shareclass validation against registrations

- Shareclass country registrations are validated at assignment
  - Warnings can be over-ruled
  - Over-ruling is logged
  - Overview of over-ruled assignments to facilitate regular review
- 
- **NO CHECK / REMOVAL OF CONTACTS AT TIME OF SENDING OUT PRODUCT UPDATE EMAILS**

# Preference Center

- Stand alone preference center for customer self service
- Mailings are grouped in the Preference Center to not overload client



The screenshot shows a web form titled "Marketing permissions" for Bellevue. At the top is the Bellevue logo, which consists of a stylized "B" icon followed by the word "Bellevue" in a sans-serif font. Below the logo, the title "Marketing permissions" is centered, followed by the instruction "Choose how you'd prefer to hear from us". The form asks the user to "Update my communication preferences for:" and displays the email address "jorah.mormont@c-value.ch". There are five checkboxes with corresponding labels: "Unsubscribe me from all marketing communications.", "Mailing - Bellevue Product Update", "Mailing - Events" (which is checked), "Mailing - Webinar", and "Mailing - Newsflow". A blue "Submit" button is located at the bottom right of the form area.

# Consent und Subscription Management

Ect!. Nach interests catalog und nach preference center zeigen.

- Consent
  - Compliance profiles (separate customer consent for Bellevue Asset Management and BB Biotech commercial commu
  - opt-in/opt-out for commercial communication and for marketing topics subscription
  - Sales driven subscription Management via interests catalog

Compliance profile

- Bellevue Asset Management AG CH
- BB Biotech AG
- Bellevue Asset Management AG CH
- Bellevue Asset Management AG SG
- Bellevue Asset Management GmbH DE
- Bellevue Asset Management Ltd. UK

**Jon Snow** - Saved  
Contact

Summary Opportunities and Holdings **Interests** Details Events

Interest Catalog

Mailings

- Name
- Events

Rows: 1

**Sales driven**

**Jon Snow** - Saved  
Contact

Summary Opportunities and Holdings Interests Details Events Insights **Consent** Related

View and change communication preferences for this contact point

Contact point: jon.snwo@c-value.ch  
Compliance profile: Bellevue Asset Management AG CH

**Communication status**  
Partial communication  
Some emails to jon.snwo@c-value.ch with Bellevue Asset Management AG CH compliance profile may not be sent.

**Tracking status**  
Will be tracked  
jon.snwo@c-value.ch contact point's interactions will be tracked.

Edit

**Communication consent records**

Customer driven (Preference center)

Purpose	Contactability	Consent
Bellevue Asset Management AG - Commercial Global <small>Restrictive enforcement model</small>	Will send <small>Reason: Opted in</small>	Opted in (Edit)
Topic	Contactability	Consent
Mailing - Bellevue Product Update	Will not send	Not set (Edit)
Mailing - Events	Will send	Opted in (Edit)

# Campaigns and Mailings

Journey, Events, Mailings

# Journeys

- Campaigns = Journeys = fully-automated workflows end2end
- Segments = Filter based on (= dynamic Marketing Listes)
  - Account and Contact data
  - Interest
  - Blacklist
- Fully automatic execution of Journey
  - Sending of reminders
  - Booking of event invitation replies (confirmations, cancellation)
  - Thank you notes
  - Delivery of event documents
  - Updating of Interests (to come)
- Multi-
  - Language
  - Corporate designs

# Campaign Insights (Marketing)

- Overview across all campaigns
- Drill-down and statistics about a single campaign (event, mailing, etc.)

The screenshot displays the Dynamics 365 Marketing Hub interface for a campaign titled "Event Management - always on - Confirmation + Event R...". The interface includes a left-hand navigation pane with categories like Engagement, Audience, Lead Management, Channels, and Content Assets. The main area shows a flowchart of the campaign process, starting with a trigger "BAM-Send Confirmation to accepted Regist", followed by an attribution step "Split event communication by language". The flowchart branches into three paths based on event language: German, French, and Italian. Each path leads to an email send step, followed by a wait period and another attribution step "Is invitation still accepted?". The flowchart also includes exit points and an "Other" category. The right-hand side of the interface features an analytics dashboard for the "Email" channel, showing a table of metrics and a delivery funnel.

Analytics	Properties	
Inflow	Processing	Processed
3	0	3

Overview		
Delivery rate	Open rate	Click rate
100%	100%	0%

Delivery funnel	
Email sent	3
Email delivered	3
Unique opens	3

Delivery issues	
There's no available data	

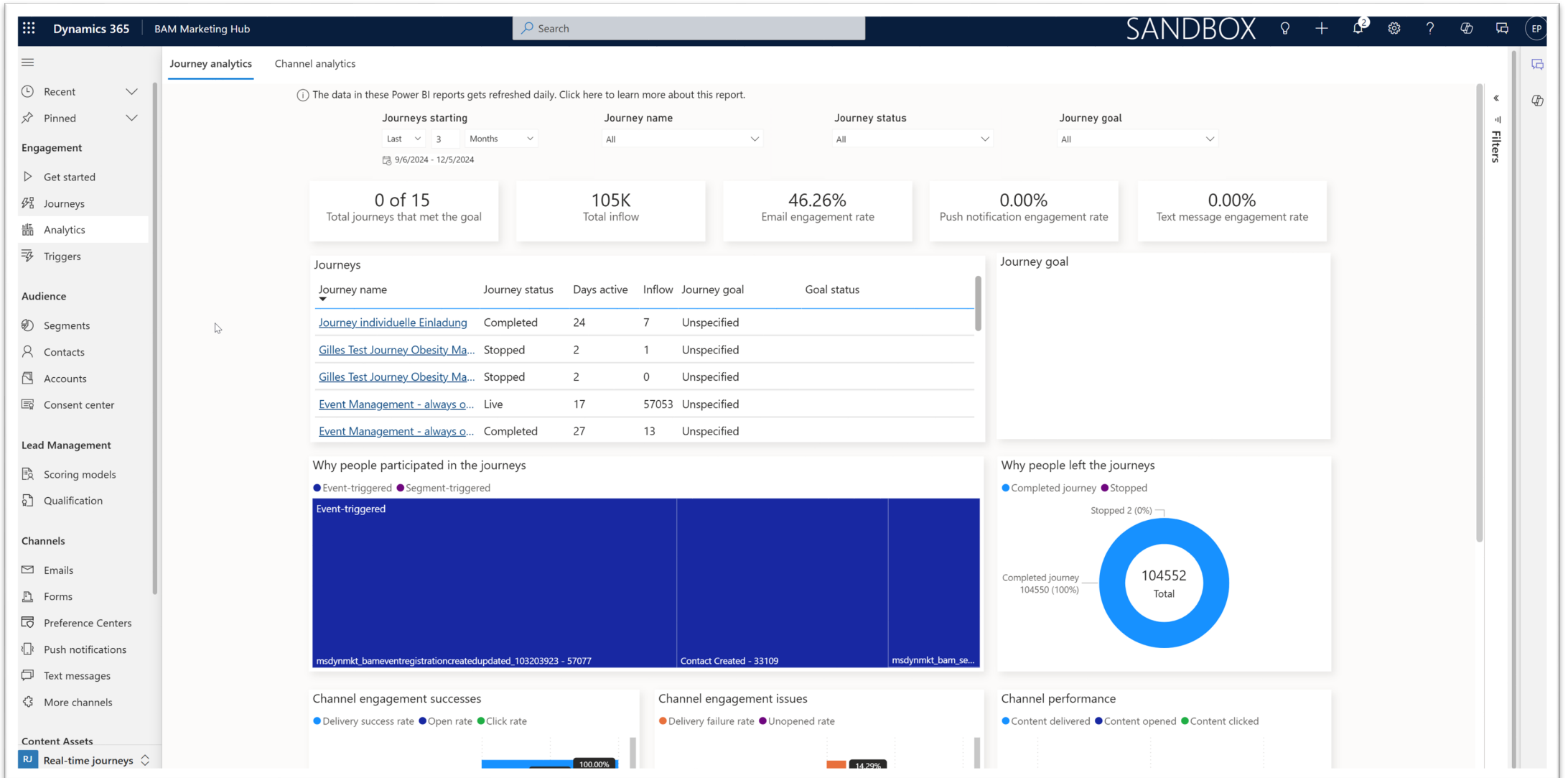
  

Variations	
Delivered variations	1



# Campaigns Insights (Marketing)

- Overview across all campaigns
- Drill-down and statistics about a single campaign (event, mailing, etc.)



# Client Insights

# Client insights - Events

- Insights on client (Contact) on specific event invitations

The screenshot displays the Microsoft Dynamics 365 interface for a contact named Jorah Mormont. The contact is marked as 'Client at risk' and managed by Christopher Höning. The 'Events' tab is selected, showing a table of event invitations and participations. The table has columns for Event, Event start date, Invitation Status, Participation Status, Building, Event Special Requests, Event Companion, Event type, and Created on. One event is listed: 'Test Event MKA 04122024' on 04.12.2024 at 11:30, with an 'Invited' status, at 'Restaurant Metropol', and an 'On site' event type. The interface includes a navigation pane on the left with categories like Engagement, Audience, Lead Management, Channels, and Content Assets. The top navigation bar shows 'Dynamics 365' and 'BAM Marketing Hub'.

Event	Event start date (Event)	Invitation Status	Participation Status	Building (Event)	Event Special Requests	Event Companion	Event type (Event)	Created on
<input type="checkbox"/> Test Event MKA 04122024	04.12.2024 11:30	Invited		Restaurant Metropol			On site	05.12.2024 1...

# Client insights - Mailings

- Insights on your clients re Journeys (not individual emails)

The screenshot displays the Dynamics 365 Marketing Hub interface for a contact named Jorah Mormont. The left sidebar shows navigation options like Recent, Pinned, Engagement, Audience, and Channels. The main content area is titled 'Insights' and provides an overview of the contact's interactions across various channels.

**Contact Information:** Jorah Mormont - Saved, Contact Manager: Christopher Höning (Deputy). Status: Client at risk.

**Overview (Last 30 days):**

- Channel engagement:** Email opened (7), Email clicked (7), Form visited (3), Form submitted (1), Text message link clicked (0), Text message replied (0), Push notification opened (0), Push notification link clicked (0), Custom channel link clicked (0).
- Email:** Total opens: 7, Open rate: 40%, Delivery issues: 1. [View email insights](#)
- Form:** Forms submitted: 1. [View form insights](#)
- Text message:** Total clicks: 0, Delivery issues: 0. [View text message insights](#)
- Push notification:** Opens: 0, Open rate: 0%, Not sent: 0. [View push notification insights](#)
- Custom channels:** Total clicks: 0, Delivery issues: 0. [View custom channel insights](#)

# Outlook Integration

# Outlook integration

- Outlook integration

# Copilot & Intelligence

# Copilot integration

- Highlights (summary) on documented activities for Accounts and Contacts

The screenshot displays a CRM timeline interface. At the top, there is a 'Timeline' header with several utility icons (plus, bookmark, filter, list, refresh, and menu). Below the header is a search bar labeled 'Search timeline' and a text input field 'Enter a note...'. A red rectangular box highlights a 'Highlights' section, which contains two bullet points: 'A meeting was held with high-net-worth individuals from Northern Germany to discuss the sustainability approach related to the launch of the BB Adamant Sustainable Healthcare Fund, focusing on ESG standards and impact investing.' and 'Two tickets for the ZFF event on October 7, 2024, were offered, with a follow-up expected from the recipient regarding attendance.' Below the highlights are 'Copy' and 'Refresh' buttons, and a disclaimer: 'AI-generated content may be incorrect. Make sure AI-generated content is accurate and appropriate before using. See terms'. The 'Recent' section follows, showing an auto-post for 'Contact Renzo Berger' and two activity cards. The first card is an email from 'Bernhard Utiger' dated 02.10.2024 14:44, with a subject line 'Bellevue - ZFF Anmeldung --> Warteliste --> 2 Ticket für d...' and a body snippet 'Guten Abend Herr Berger Besten Dank für Ihre Abklärung...'. The second card is a phone call from 'Bernhard Utiger' dated 01.10.2024 14:30.



# Technical Integrations

# Technical data integrations

## ODS to CRM

- Daily delivery of NAV/Price and Performance data to calculate Opportunity and Holding volumes
- Shareclass registrations to verify Shareclass assignments for mailings
- Exchange rates

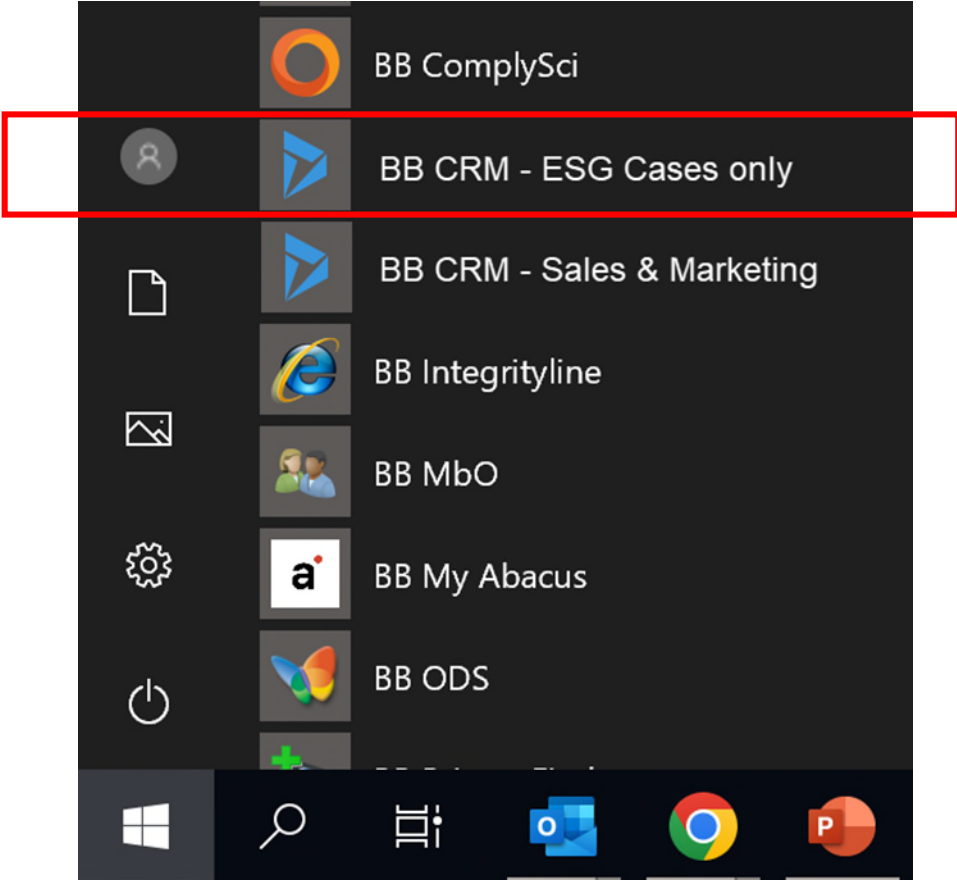
## CRM consumers

- Inducement
- Power BI Dashboards (to come)

# ESG Solution

# ESG Solution for PM continues in current CRM

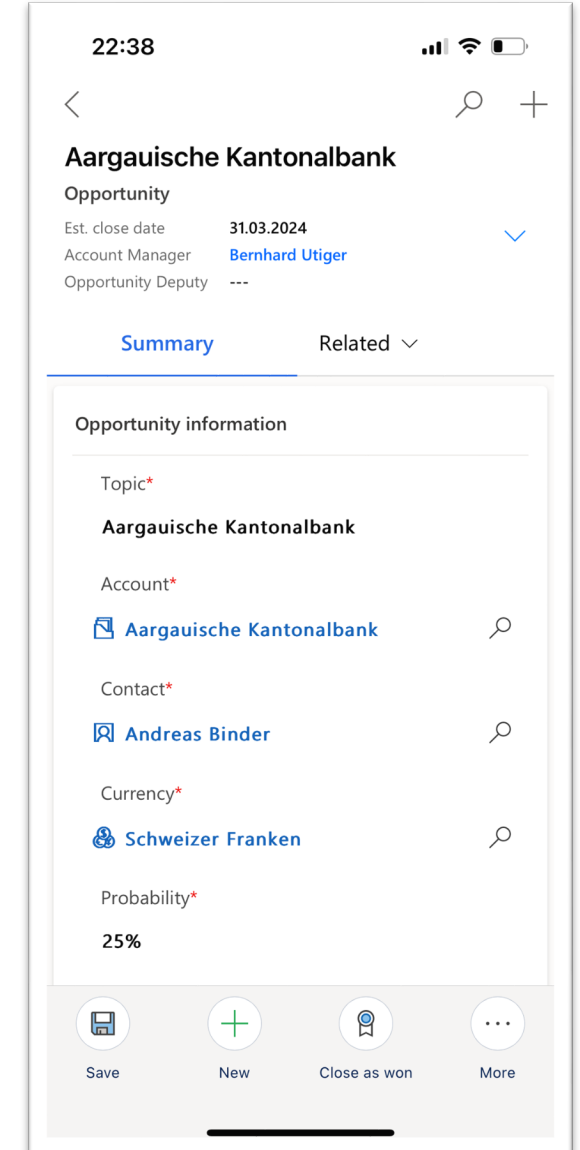
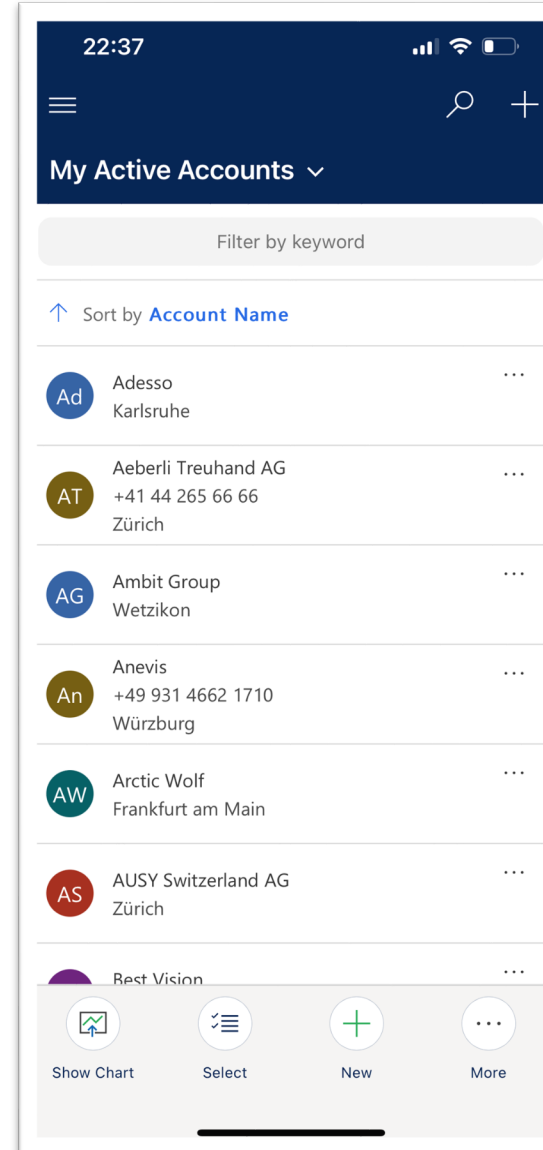
- Will be replaced in the course of 2025
- PMs to continue tracking ESG cases in current (old) CRM



# Mobile Access

# Mobile access

- Native (not Citrix)
- Supported devices: iOS (iPhone, iPad)
- Installation guide sent out with go-live



# Outlook 2025

- Dashboards
- Converting Event Participations to Topics



# Support

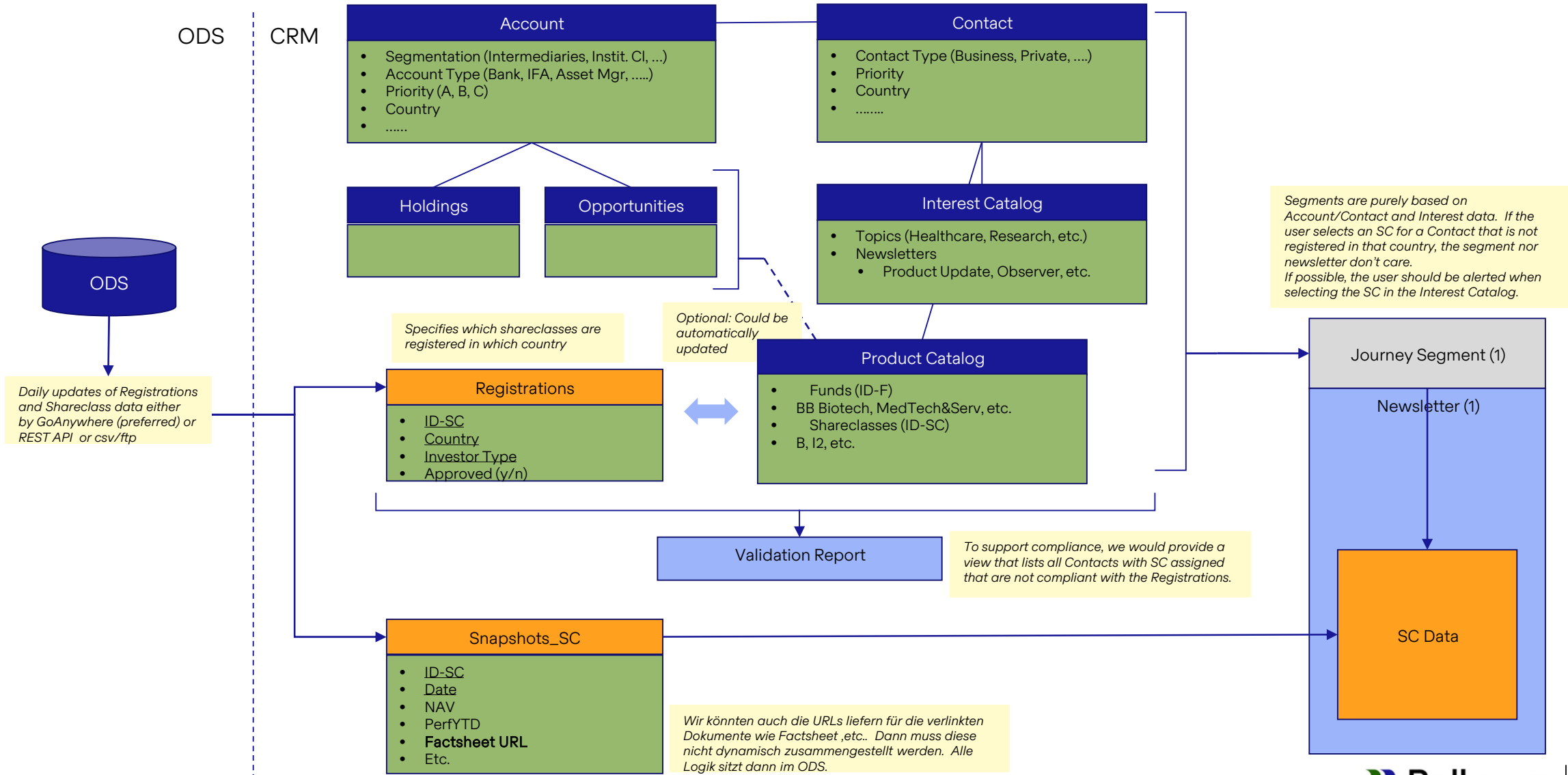
# Support

1. Your team
2. Power Users
3. IT-Support
4. Ambit (only through defined users)

# Appendix

# Newsletter design concept (proposal Reto)

- Principles followed in design:
1. Decouple to reduce complexity in technical solution and usability
  2. Keep flexible
  3. Do not prohibit, but enable control



Segments are purely based on Account/Contact and Interest data. If the user selects an SC for a Contact that is not registered in that country, the segment nor newsletter don't care. If possible, the user should be alerted when selecting the SC in the Interest Catalog.