



**Private Banking Switzerland Awards 2017**  
**Awards Information Pack**

The inaugural Private Banking Switzerland Awards 2017 will take place on 12<sup>th</sup> December at the Zurich Marriott Hotel in Zurich, Switzerland.

This year companies can nominate in 12 categories. Full details of this year's categories and criteria can be found in this document.

Nominations are now open – deadline for entries is 5pm GMT on Friday 29th September

Send your completed nominations to [PBISAwards17@compelo.com](mailto:PBISAwards17@compelo.com)

Nominees should follow these simple guidelines to ensure their submission has the best chance of winning.

#### Submission Rules

1. Submissions can be made either on behalf of your own company or in recognition of a colleague or partner firm.
2. Maximum of 1,000 words in Word format, no appendices.
3. Entry must address the award category explicitly, not generic links to web sites, corporate marketing etc.
4. Submissions should highlight the key differentiator and competitive nature of the project or implementation
5. It is made explicit the Entrant, Judges and the publication will treat any and all information in strict confidence and any quotes or information to go into the public domain will be pre-cleared by the Entrant.
6. Submissions made after the publicised cut-off date will be ignored irrespective of their relative merits.
7. The Editor and Judges reserve the right to make no award for any specific category
8. The Editor and Judges reserve the right to move a submission to a more appropriate category at their discretion
9. In submitting for more than one category the submissions must be unique (see 3)
10. The Editor and Judges' decision is final

The full list of awards categories and criteria for this year's awards can be found below.

*Please note: Whilst we recommend you to try to submit against as many of the criteria as possible, we appreciate that for some companies this may not be possible. The more you can respond against the stronger your application will be, but we would like to highlight that submitting against all criteria is not mandatory.*

Should you require further guidance on your entry please contact our Editor – Ronan McCaughey – [ronan.mccaughey@verdict.com.uk](mailto:ronan.mccaughey@verdict.com.uk)

Good luck in your submissions!

## Outstanding Customer Relationship Service and Engagement in Switzerland

*Celebrating a private bank with an outstanding performance record in servicing wealthy clients, customer engagement and relationship management, the use of new technologies, social media and applications*

Suggested performance criteria to include (where possible):

- Number of private clients
- Percentage of new clients in past 12 months
- Number of advisors/relationship managers/private bankers
- Please expand on the initiatives your institution has taken to enable successful customer relationship service and engagement, and why you deserve this award
- Please describe the competitive environment for this proposition, referring to similar peer initiatives, and describe why this offering stands out
- How do you plan to develop the service capability in the future?

## Excellence in Customer Experience (Technology Provider).

This award recognises software and technology solution providers that enable private banks, family offices and wealth managers to offer a first-class customer experience to their clients.

The provider should be able to demonstrate how their technology / software solution has improved the client's private banking / wealth management experience. An example could be speeding up the process for the client.

The judges will particularly be looking for evidence that the software or technology innovation has improved the customer experience, for example, by increasing customer satisfaction scores.

## Best Next Generation Offering in Switzerland

*Celebrating an institution that is extending its product proposition effectively and successfully to engage the next generation of wealthy clients*

Suggested performance to include (where possible):

- Number of private clients
- Percentage of new clients in past 12 months
- Please describe the service offering you are entering and why?
- Please describe the competitive environment for this proposition, referring to similar peer initiatives, and describe why this offering stands out
- How do you plan to develop the service capability in the future?

### Outstanding UHNW Offering in Switzerland

*Celebrating an institution that is extending its product proposition effectively and successfully to satisfy the needs of the ultra high net worth clientele*

Suggested performance to include (where possible):

- Number of private clients
- Percentage of new clients in past 12 months
- Please describe the service offering you are entering and why?
- Please describe the competitive environment for this proposition, referring to similar peer initiatives, and describe why this offering stands out
- How do you plan to develop the service capability in the future?

### Outstanding Philanthropy Proposition in Switzerland

*Celebrating a private bank that is making a real contribution to their clients philanthropic' lives by enabling different ways of giving and establishing best practice*

Suggested performance to include (where possible):

- Number of private clients
- Percentage of new clients in past 12 months
- Number of advisors/relationship managers/private bankers
- Please describe the service offering you are entering and why?
- Please describe the competitive environment for this proposition, referring to similar peer initiatives, and describe why this offering stands out
- How do you plan to develop the service capability in the future?

### Outstanding Family Office Proposition in Switzerland

Suggested performance to include (where possible):

- Client assets under management
- Net new money
- Number of private clients
- Number of advisors/relationship managers
- Annual staff retention rate
- Please expand on your specific business model as well as retention strategy in Switzerland
- Please expand on the other strengths that enable your institution to excel and stand out in the Swiss family offices market (in no more than 250 words)
- Please expand on the important new initiatives you have launched in 2016 that strengthens your value proposition

### Outstanding Wealth Management Technology Provider in Switzerland - middle and back office (Vendor)

*Celebrating a company that is making a real contribution to the efficiency and customer-centricity of the Swiss wealth industry through successful middle and back-end technology offerings*

Suggested performance criteria for the region to include (where possible):

- Number of clients
- Percentage of new clients in past 12 months
- Number of advisors/relationship managers/private bankers
- Please describe your institution's wealth management technology platform and why it deserves this award? When was this platform launched and how have you developed this service in 2016?
- Kindly expand on what makes this technology platform stand out from its competitors

### Outstanding Wealth Management Technology Platform in Switzerland (Bank)

*Celebrating a private bank that has enhanced its digital platform offering successfully to empower its relationship managers as well as enable customer-centricity, client satisfaction, and increased overall efficiency*

Suggested performance criteria for the region to include (where possible):

- Number of clients
- Percentage of new clients in past 12 months
- Please describe the service offering you are entering and why? When was this product launched and how have you developed this service in 2016?
- Kindly expand on what makes this product stand out from its competitors
- How do you plan to develop the service capability in the future?

### Outstanding Front-End Digital Solutions Provider (Vendor)

*Celebrating a company that is making a real contribution to the efficiency and customer-centricity of the Swiss and Europe wealth industry through successful front-end digital offerings*

Suggested performance criteria for the region to include (where possible):

- Number of clients
- Percentage of new clients in past 12 months
- Please describe the service offering you are entering and why? When was this product launched and how have you developed this service in 2016?
- Kindly expand on what makes this product stand out from its competitors
- Client recommendations/ successful case study

### Outstanding Boutique Private Bank in Switzerland

*Celebrating the best among the smaller-sized, boutique private banks that are successfully serving wealthy clients in Switzerland*

Suggested performance criteria to include (where possible):

- Client assets under management
- Cost/income ratio
- Net new money
- Number of private clients
- Number of advisors/relationship managers/private bankers
- Annual staff retention rate
- Please expand on how being a boutique private bank is an advantage for you
- Please expand on your specific business model and client acquisition as well as retention strategy
- Kindly mention other strengths that enable your institution stand out in Switzerland

### Outstanding Private Bank – Switzerland - International Players

*Celebrating the best among the private banks in Switzerland that are successfully serving international wealthy clients*

Suggested performance criteria to include (where possible):

- Client assets under management
- Cost/income ratio
- Net new money
- Number of private clients
- Number of advisors/relationship managers/private bankers
- Annual staff retention rate
- Please expand on your specific business model and international clients acquisition as well as retention strategy in Switzerland
- Please expand on the other strengths that enable your institution to excel and stand out

### Outstanding Private Bank – Switzerland- Domestic Players

*Celebrating the best among the private banks in Switzerland that are successfully serving domestic wealthy clients*

Suggested performance criteria to include (where possible):

- Client assets under management
- Cost/income ratio
- Net new money
- Number of private clients
- Number of advisors/relationship managers/private bankers
- Annual staff retention rate
- Please expand on your specific business model and domestic clients acquisition as well as retention strategy in Switzerland
- Please expand on the other strengths that enable your institution to excel and stand out