

Senior Financial Services Leader | Strategy & Transformation | Data & Digitalization | Customer Engagement | AgeTech Innovation & Entrepreneurship



Stefan Affolter

EXECUTIVE PROFILE

Senior leader with 25+ years of experience driving large-scale transformation across front- and back-office environments in Retail and Private Banking (CH & global). Proven record in leading complex organizations through digitalization, data/BI capabilities, customer engagement innovation, outsourcing governance, and service excellence. Currently in career transition.

CORE EXPERTISE

Business transformation & organizational design • Service management & outsourcing governance • Digitalization & data-driven performance • Omni-channel customer engagement & experience design • Leadership & people development (leading leaders, talent & empowerment programs) • Agile collaboration & cultural transformation • Longevity innovation & societal impact (AgeTech)

CAREER HIGHLIGHTS

UBS, Zürich (2024–2025) – Head Business Enablement, Private & Corporate Operations: Oversaw global service performance, provided service reporting and data capabilities, and supported service framework integration post Credit Suisse merger. Led business enablement and data governance.

Credit Suisse, Zürich (1998–2024) – Head Service Management Global Operations Switzerland / Chief of Staff & Transformation Lead, Swiss Private Clients:

Directed multi-year transformation programs for customer engagement, digital channels, and service delivery. Managed central functions for service & sales organizations with 1000+ employees. Implemented omni-channel customer interaction platform and virtual service hubs. Led outsourcing initiatives, risk and compliance governance, and data-driven performance frameworks.

Earlier Roles – A.C. Nielsen S.A., Sulzer Rütli AG, and others.

EDUCATION & DEVELOPMENT

MBA (Lic. rer. pol.), University of Bern • Leadership & Executive Development, IESE Business School, Barcelona/Madrid/NY • IMD High Impact Leaders Program, Zürich • Agile Leadership, Digital Transformation & Data Literacy programs • UBS & Credit Suisse Startup Incubators

LANGUAGES

German (native) • English (fluent) • French (basic)

PERSONAL ENGAGEMENTS

Promoter of Smart Aging for social good / AgeTech entrepreneurial initiatives simplifying life for silver society • Engaging in creative hospitality projects