



Success story



CAS genesisWorld

Sector

Food industry

Objectives/Requirements

- Uniform CRM for both back and front office
- Optimized customer-centric processes
- Reduction in administrative costs for the 120 strong sales team
- 360° view of all customers based on one central database
- Efficient campaign management
- Integrate with existing ERP system

Benefits and Advantages

- Comprehensive customer dossier, which includes data on quotes, refunds, contracts and correspondence and so on
- Streamlined working between back and front office
- Enormous time-saving on administrative duties, which means more time for looking after customers
- Significantly improved data quality
- Customer visits are now optimized and process supported
- Order entry in the CRM system with pricing and forwarding to the ERP system
- Targeted management of the multi-phase marketing campaigns using cross-and-upselling measures
- Transparent reporting and meaningful key

Working with a consistent customer perspective for more success

Vogeley is a family run business that is steeped in tradition and based in Hameln. They specialize in the production of high quality foodstuffs for wholesale. Hospitals, retirement homes, company canteens, school & university canteens and restaurants count among their regular customers. Since November 2011, Vogeley has been using the CAS genesisWorld CRM solution, and as a result, sales employees can now access current customer data centrally.

Searching for a powerful CRM

Vogeley markets its approximately 800 convenience products by means of direct sales, in which around 120 employees work in both back and front-office roles. Until now, the company has used the Comarch SoftM ERP solution to manage its customer data. The back-office employees maintained the data manually. The front office employees would inform the back office employees by fax of any orders placed, as well as any changes made to customer contact data. The administrative costs of this process soon became prohibitive, which is what finally led to the decision to search for a powerful CRM system that offered more than just simple and secure data maintenance. In fact, Vogeley wanted a solution that would also provide the basis for efficient and future-proof campaign management. After carefully comparing and contrasting the CRM solutions, they decided on CAS genesisWorld – in the form of the standard CRM solution, which is tailor-made to cater for the requirements of SMEs.

Optimizing the internal business processes

The primary goal was to implement an efficient and uniform system that all the sales employees in both back and front office could access. The ability to optimize the operative processes such as the simple recording of customer or prospect data was an important criterion. Using the old ERP solution, sales employees had to spend more than two hours a day on administrative duties. Helping employees to save time here by making their work easier became a particular focus. This resulted in more time to talk to customers.

Centralized data storage is a core principle

One major advantage of the CAS genesisWorld as an integrated CRM solution is the centralized data storage: all customer activity such as offers, orders, invoices, appointments and refunds are recorded centrally to the CRM through a direct integration with the existing ERP solution. Making this work was initially the responsibility of the experts from movento, who defined the integration with the ERP system. This seamless integration permits the automatic synchronization of all customer data as well as data from the various company departments such as accounts with the CRM system. Today, all the data relating to customers, products and sales representatives can be depicted in the CRM. A number of departments profit from the advantages of centrally stored data, not just sales, for example: product management, accounts or research and development. And finally, a sophisticated access rights system ensures that only those employees with sufficient access rights, as defined by the administrator, get to access data that is meant for them.



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"The new CRM solution provides us with excellent support for the efficient planning of our sales activities. Now, they can all be better coordinated with one another."

Eberhard von Korff,
Sales controller, Vogeley



Project data

- Operational since 2011
- CAS genesisWorld Premium Edition
- Survey module
- Report module
- Form & Database Designer module
- Integrated into the existing ERP system SoftM
- Sophisticated rights system
- Front office mobile integration currently being planned

Customer

VOGELEY GmbH Wholesale Service, Hameln,
Germany
www.vogeley.de

- Established 1892, family business
- Producers of high quality foodstuffs for wholesalers
- Direct sales via 120 back and front-office employees

Project partner

movento GmbH, Mannheim, Germany
www.movento.com

CAS genesisWorld

- Professional customer management
- Supports internal processes, increases efficiency
- Especially for the needs of SMEs
- Very good price-performance ratio
- Flexible, integrable, extendable
- Established, multiple-award-winning product
- Over 200 CRM specialists provide on-site support
- More than 7,500 businesses work successfully with CAS genesisWorld

Interested?

We would be more than happy to provide you with advice and information about CRM.

Call our customer support hotline on +49 721 9638-188 or e-mail us at CASgenesisWorld@cas.de.

We look forward to hearing from you!

Another significant improvement is the quality of the data, especially contact data, which can be attributed to the dedication of the employees in correctly maintaining their data and the automatic CRM system management. According to Eberhard von Korff, Sales Controller for Vogeley: "Our CRM solution offers us a number of smart functions, for example, automatic address recognition. As a result, the field employees can now create contact data for prospects at the touch of a button, the system automatically suggests corrections."

Strategic sales planning using the 360 degree view

What advantages does centralized data storage offer sales? Firstly, both the back office and front-office employees have the benefits of a 360 degree view of their customers. In just a few mouse clicks, you can find out, for example: whether a customer complaint was dealt with correctly to the satisfaction of the customer, or check to see if a new offer has been sent out, or whether a new contact has been acquired through telephone services. In addition to the smart functions and the user friendly interface, the CRM solution is also of great strategic importance to Vogeley. The solution offers diverse opportunities for analysis on a number of levels such as turnover development at the product, representative or regional level. Moreover, the solution offers transparency for the optimal planning of customer visits – the core of the CRM solution.

Planning customer visits effectively

"Our sales representatives work according to a fixed-tour plan, which defines exactly which customers should be visited and when. There are a number of factors that play an important role in this planning such as the classification of customers according to specific criteria. Therefore, it is essential that we maintain a complete overview of all our customers and their activities. The new CRM solution provides us with excellent support in this regard, which enables us to coordinate our sales activities more effectively", explained Eberhard von Korff.

Campaign management controls 7,000 actions

The implementation of sales activities is supported by the campaign management component. This component enables the targeted management of actions and campaigns. We currently have a campaign running that contains 7,000 actions including several cross-and-upselling measures. With the help of the CRM solution, Vogeley



can monitor the status of these campaigns at any time, and if necessary, adjust them to suit changing conditions. It is also significantly easier to carry out follow-up actions, for example, processing trade fair contacts, or executing regional campaigns using the campaign management function. "We can organize our actions any way we wish using the CRM system, which means we can customize actions according to our company goals", added Eberhard von Korff.

Continual further development

Vogeley implemented the CRM project in a matter of months together with movento. Thanks to the ease of operation the user feedback has been very positive. Vogeley has even introduced a "CAS Newsletter" so that the sales employees, and users from other departments, can keep up-to-date with what is going on. The newsletter is published regularly and contains information on items such as the latest functions available in the CRM solution. And there are a number of new functions, because the solution is constantly being developed to include the changing requirements of the various departments. At the moment, order processing is being implemented, and for the future, a mobile integration is being planned to provide further support for the sales representatives.