



CAS genesisWorld

Industries

Mechanical engineering/Agricultural machinery/Retail

Objectives/requirements

- A unified, central system for all three business areas
- All address and correspondence data consolidated in a uniform, central system
- A management tool to manage individual projects and work times
- Central knowledge base
- Central document filing

Benefits and advantages

- Efficient organization of the three business areas
- Overview of projects and working times
- Now, all of the important e-mails, faxes and voice mail messages can all be found in the project or customer dossiers
- Due to the knowledge database that is always kept up-to-date, qualified decisions are easier to make
- Simple management and archiving of incoming and outgoing invoices
- Project status and costs at the touch of a button
- A flexible solution: easy integration into the diverse IT system landscape



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Success story

BRANDL
EITENSHEIM
METALLBAU
LANDTECHNIK
EINZELHANDEL

A solid data foundation in skilled trade SMEs

From a traditional family firm to a modern SME - and from three independent business areas to a cross-the-board data basis and organization structure. With the sector independent Customer Relationship Management solution CAS genesisWorld, Thomas Brandl was able to integrate specific project and customer information into a unified system.

A long tradition of customer focus

During more than a hundred years of business, the company has had to adapt to ever changing market situations and customer wishes. The company has come a long way, through its colorful history spanning well-repairs around 1900, to plumbing works in the 50s and finally developing into the modern company it is today with three completely different business areas. The family company consists of a workforce of 70 based in Eitensheim near Ingolstadt, they are active in a variety of fields that includes mechanical engineering (constructions of glass and steel), agricultural machinery and the glass, porcelain and ironmongery retail trade.

A unified, central system

To manage and organize all three areas efficiently, the company searched for a CRM system which could consolidate all the address and correspondence data from each of the three fields into a unified, central system. Additionally, the company was looking for a management tool for the largest of the business areas, namely their mechanical engineering activities with their 45 strong workforce, that could manage individual projects and work times. When discussing the decision to go with CAS genesisWorld, Thomas Brandl, Managing Director, remembers that, "CAS genesisWorld was simply the best fit in terms of meeting our requirements with respect to tailor-made customizations and interfaces". The flexible solution pipped three other competitors to the post, all of which were on Brandl's shortlist of potential alternatives.

Integration into a varied system landscape

The solution's flexibility ensured that CAS genesisWorld could be quickly integrated into the varied IT landscape. This depended upon some important interfaces, namely: a unidirectional interface with ERP software AMS Faktura, also to the David Info Center for Unified Messaging, as well as archiving and to the ESTOS TAPI server for caller/number recognition.

Optimizing the organizational structure

The company implemented CAS genesisWorld to coincide with the start of the new business year on January 1, 2008. The basic functionality of the CRM system from address management to document filing is available in and across all three business areas. Project management and processing is particularly important to the mechanical engineering side of the business. The previous organizational structure resulted in all the information bottlenecking with the owner of the company. This is a typical organizational structure often found in skilled-trade companies, however, due to the increasing number of projects and orders, the company soon found itself struggling to keep their eye on the ball. Control tasks could not be delegated easily or parallelized.

"We are delighted to have found a software solution in CAS genesisWorld that comfortably and flexibly meets our requirements and the requirements of our processes."

Thomas Brandl,
Managing Director



Project data

- Operational since the start of 2008
- CAS genesisWorld used at 15 workstations
- A unidirectional interface with ERP software AMS Faktura
- An interface with the David Info Center for Unified Messaging and Archiving
- An integration with the ESTOS TAPI server enabling caller/number recognition

Customer

Erhard Brandl Dipl.-Ing., Eitensheim
www.brandl-eitensheim.de

- 70 employees
- A family company with a 100 years of tradition
- Three business areas: retail, mechanical engineering and agricultural machinery
- Construction specialists in glass, stainless-steel and steel
- Awarded the "Global Innovator Award" from the International Housewares Association for being one of the best ironmongery businesses worldwide (2003)

Project partner

xpecto talonec GmbH, Kraillingen
www.talonec.com

CAS genesisWorld

- Professional customer management
- Supports internal processes, increases efficiency
- Specially designed to meet the needs of SMEs
- Very good price-performance ratio
- Flexible, easy to integrate, extendable
- Established product – winner of several awards
- Over 200 CRM specialists provide on-site support
- Being used successfully by more than 7,500 companies

Interested?

Call us for advice on implementing CRM in the skilled trades

You can reach our customer hotline on +49 (0)721 9638-188 or by e-mail at CASgenesisWorld@cas.de.

We are looking forward to hearing from you!

Brandl: "In this respect, CAS genesisWorld has redesigned the organization to such an extent that, within a very short space of time, all of the company managers from the first and second management teams now have independent overviews of all the open or closed projects. This has created a knowledge base that supports qualified decision-making and improved responses to both customer and supplier enquiries."

Archiving at the click of a mouse

CAS genesisWorld brings great advantages to employees when communicating or corresponding with customer and suppliers. "Through the integration with the David Info Center we can save all the important e-mails, faxes and voice mail messages to the CAS database at the click of a mouse", explained Brandl. And by linking the respective project or customer dossier, incoming information is not just saved in the right place, but it can also be recalled quickly when visiting a customer or reviewing a project.

View your project and work times at anytime

It's interesting to look at project management in detail: basically, every build contract that Brandl wins and completes is set up as a project with sub-projects in CAS genesisWorld. All the resulting information associated with a project such as addresses, plan and correspondence with architects and clients is assigned to a project in the system. Likewise, photos, management reports and other information from the respective building sites all flow into the associated projects. The individual working times of all employees are entered via the quick input mask and linked with the respective project. Then via an Office interface, the working times are transferred, as necessary, directly into the Microsoft Excel invoices. All incoming bills are scanned and linked as documents with the respective project. "This makes the managing and archiving of incoming and outgoing invoices much easier", reported Brandl from practical experience. Keeping an eye on current project status is easy with the "hierarchical categories" function. "This helps us to maintain an overview of the projects and associated costs.", confirmed Brandl.

The solution for diversified companies

Brandl does not regret the decision to go with just one system instead of multiple industry specific solutions. Quite the opposite: "We are happy to have found such a software solution in CAS genesisWorld, because it is flexible and can be adapted easily to our diverse requirements and processes." CAS genesisWorld offers the SME benefits in both the short and long term: the central address database and document file, intelligent project and work time management and last, but not least, the re-organization of the decision-making process in all three business areas based on the new information structure.

