Success story

Fraunhofer Institut
Produktionstechnik und
Automatisierung

IPA

CAS genesisWorld

At a glance

Industry sector: Research and consulting

Requirements:
► Central address management
► Customer-oriented document storage (quotes, acquisition materials, final project reports)
► Better and more comprehensive customer support
► Individualized approach to customers
► Marketing and project controlling
► Display of research and consulting projects
► Knowledge management for the entire Institute
► Recording and processing of online applications

Benefits and advantages:
► Uniform contact maintenance
► Control and monitoring of acquisition activities
► Reliable sales forecasts
► Complete customer correspondence together with target-group-specific mailing activities
► Transparency in document storage
► Complete customer and project history
► Better exchange of information and knowledge within the team
► Fast, professional processing of online applications

Knowledge management for the innovation

The Fraunhofer Institute for Production Technology and Automation IPA in Stuttgart has made a name for itself as a provider of innovation for modern organizational models and technology concepts.

With its research and development projects, the Fraunhofer Institute points out potentials for increasing competitive capabilities with optimum business processes, carefully planned production solutions, and improved products. Employees in the "Company Logistics" and "Company Management" divisions are supported in their everyday work by CAS genesisWorld. The product is used especially in marketing, sales, and processing of online applications.

Wanted: high level of transparency in customer management

The top items in the requirement profile of Fraunhofer IPA included central address management, customer-oriented document management, and display of research and consulting projects. "We wanted to establish a knowledge management system spanning the entire Institute to support our customers even better and more comprehensively," explains Klaus-Peter Zeh, Director of Factory Planning and Production Management, and Project Director of Fraunhofer IPA. "A tool for marketing and project controlling was also important. And finally, we wanted to be able to record online applications faster and process them more expeditiously."

Found: the optimum combination of CRM and Groupware for Marketing

The decisive factor in deciding for CRM Groupware was the range of functionality of CAS genesisWorld and adaptations made by the Competence and Development Partners itdesign GmbH of Tübingen. The standard functions were enhanced through itdclient pro by itdesign. This additional module makes it possible to assign documents and projects hierarchically. "We used to store documents on file servers without any uniform structure and access control" says Zeh reflectively. "Today we are developing a complete system of contact management together with control and monitoring of acquisition activities. We use CAS genesisWorld for the majority of our customer correspondence and mailing campaigns."

Individual approach to customers thanks to a comprehensive address

Marketing at Fraunhofer IPA places great emphasis on a direct and personal approach to existing customers and leads. The Customer History of CRM Groupware is indispensable in generating new customers and maintaining contacts. Notes from meetings, documents, tasks, and projects are all just a click away. Mailing campaigns target between 500 and 7000 existing customers and leads. The extensive filtering features of CAS genesisWorld were used to select addresses by specific target-group. Selection criteria include the status (customer or leads), industry sector, participation in conferences or trade shows, and postal code area.

►►►

"With CAS genesisWorld we have set up a knowledge management system for the entire Institute that allows us to support our customers better and more comprehensively. We were especially impressed by the innovative and advanced software technology and the wide range of functionality in the standard version of CAS genesisWorld."

Klaus-Peter Zeh, Department Director Factory Planning and Production Management, Fraunhofer IPA

Project data:

► CAS genesisWorld in use since mid-June 2001
► 135 licenses in use, will eventually include 250 - 300 users
► Online form for applications via Internet

Customer:

Fraunhofer IPA, Stuttgart
www.ipa.fhg.de

► Innovation provider for modern organisational models and IT concepts
► Founded in 1959 in Stuttgart, Germany
► 200 employees
► Sales volume in 2000: 33.5 million Euro
► Research and development work on organizational and technological tasks in industrial production

Implementing partner:

itdesign GmbH, Tübingen
www.itdesign.de

CAS genesisWorld:

► Professional customer management
► Supports internal processes, increases efficiency
► Specially designed to meet the needs of SMEs
► Very good price-performance ratio
► Flexible, integratable, extendable
► Established product - winner of several awards
► Over 110 CRM specialists provide on-site support

Control, qualifying and controlling of acquisition

Specialised canvassers are responsible for the sales part with customers. CRM Groupware provides support for them in qualifying contacts based on stored data (customer history). It also helps them in controlling the follow-up (task management) and controlling the acquisition process, including sales forecast and other forecasting features. With access to transparently stored quote documents, sales employees can also put together templates structured by selected topics for additional quotes. Finally, documentation is created at the end of a sales project for signed contracts and services provided and made accessible for all employees. Then the data is also available for marketing to control future initiatives.

Fast processing of online applications

CAS genesisWorld is also used in Human Resources to relieve the workload in recording and processing online applications. Job applicants can fill in a detailed application form on the Fraunhofer Institute homepage (www.ipa.fhg.de), entering personal details and information about education, professional experience, areas of knowledge, and motivation. Mandatory fields ensure that complete basic information is provided. When the completed form is submitted, CRM Groupware automatically creates an address for the applicant.

All data is transferred from the Internet form to an extended CAS genesisWorld address mask, where it is available for subsequent processing. The employee responsible for the application is notified immediately about the applicant by the messaging service itdpns, a CAS genesisWorld add-on module from itdesign. The application can either be forwarded selectively and manually to the appropriate area of the company, or a click of the mouse places it to the Intranet Applicant Marketplace of Fraunhofer IPA. This makes it possible for the numerous online applications that are received by the Fraunhofer Institute to reach the right destination as quickly as possible and with minimum administrative overhead.

Impressive range of services, professional implementation

"We were especially impressed by the innovative and advanced software technology and the wide range of features included in the standard version," says Zeh in conclusion. "That keeps the overhead of implementation within manageable limits. We have also found a very competent partner in itdesign, one that is well versed in technical matters and also implemented our needs professionally."

In addition to the Fraunhofer IPA, the Fraunhofer research association "e-Industrial Services" also uses CAS genesisWorld.