CAS genesisWorld

At a glance

Industry sector: Vehicle equipment

Requirements:

► Brings company closer to customers; better customer support

► Greater effectiveness in marketing, sales, and field service

► Central, uniform address data storage

Integrated into Exchange/Outlook

► Data updates between central office and branch offices/field service employees

Benefits and advantages:

► Uniform address maintenance

► Fast processing of appointment management

► Comprehensive customer histories

► Rapid processing of customer requests, quotes, and visit reports

► Selective, target-group-specific mailing campaigns

► Field service is integrated through data replication

► Dates, addresses, tasks, documents, and project data are always available for field service

► Fast forwarding of trade show leads

► All in all, makes work more efficient

Success story Sortimo®

The fine art of a target-group-specific approach to customers

Anyone looking for equipment for service vehicles, workshops, and storage facilities will quickly come upon Sortimo, the market-leading provider for fitting systems and complete equipment. Sortimo's customers include DaimlerChrysler, Volkswagen and Siemens; Sortimo equipped more than 13,000 service vehicles for the Italian energy company ENEL in 1998. Since January 2001, Sortimo has been supported in marketing and sales by CAS genesisWorld.

Requirements

Sortimo decided in 1999 to set up a central customer information system. CRM project director Rudolf Schuster describes the process: "Until that time there were a number of different 'address islands' in the company that weren't connected with each other. MS Outlook was used for internal communication, but it did not extend beyond the immediate team." Three requirements were therefore of central importance for Sortimo. Here's how Schuster summed up the situation: "We wanted to be closer to customers, provide better customer support, and have greater overall effectiveness in the areas of marketing, sales, and field service." Because of its comprehensive functionality, especially in the area of address and appointment management, modern technology, and the good price-to-performance ratio, Sortimo opted for CAS genesisWorld from CAS Software.

Implementation

Our solution partner in Augsburg, SMC IT AG was responsible for implementation. SMC added address fields to the standard masks to ensure uniform address maintenance. Schuster on working together with the solution partner: "SMC supported the entire course of the project very competently with implementation, workshops, and training."

Complete customer histories

Since January 2001, the Sales and Marketing divisions have been working with CAS genesisWorld. The program is used together with CRM groupware to create quotes and visit reports, check the processing status of customer requests, and send information material to customers and leads. "Appointments and meetings are completely handled by the extensive appointment management features" explains Schuster. "And since Outlook/Exchange is used for internal and external communication, all relevant information can be linked with a customer address or project and archived in the system."

Mailings with selective differences

Sales promotion employees find the ability to make selective differences in mailing campaigns especially valuable. Project director Schuster describes the advantages of the new system: "Now we can filter customer addresses very precisely according to sales, industry sector, postal code, and previously purchased products. This allows us to achieve a customer approach that is highly target-group-specific." CAS genesisWorld also supports evaluation mailings.

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"We are very satisfied with CAS genesisWorld. The system is easy to use, provides a good overview of customer records, quickly processes trade show leads, and provides comprehensive support for marketing campaigns. That has led to a high rate of acceptance. CAS genesisWorld has helped us improve our efficiency."

Rudolf Schuster, CRM Project Director, Sortimo International GmbH

Project data:

► In use since January 2001
► Used in central office and various branch offices
► External service providers are integrated
► CAS genesisWorld and CAS teamWorks used in combination
► ERP interface to SAP customer clearing based on CAS genesisWorld ERP.Connect

Customer:

Sortimo International GmbH, Zusmarshausen, Germany
www.sortimo.com

► Leading international provider of equipment and systems for service vehicles and workshops
► Over 300 employees
► 6 branch offices in Germany
► Company foundation in Augsburg in 1973
► Reference customer: DaimlerChrysler, Volkswagen, Siemens, ENEL

Implementing partner:

SMC IT AG, Augsburg
www.smc-it.de

CAS genesisWorld and CAS teamWorks:

► Professional customer management
► CRM and Intranet/Extranet with shared database
► Supports internal processes, increases efficiency
► Simple distribution of information, transparent at any work station
► Full service company portal for employees, customers, suppliers, or partners
► Flexible, integratable, extendable
► Very good price-performance ratio
► Established products - winner of several awards
► Over 110 CRM specialists provide on-site support

Customer data, even on-site

Quickly updating data between the company's central office and part of the field service employees was also very important for Sortimo. This makes all appointments, addresses, tasks, documents, and project data for a customer available on-site. Today the company's branch office in Lünen and external service providers are already regularly exchanging address data with the central office in Zusmarshausen.

Fast forwarding of trade show leads

"Every year, we attend numerous professional trade shows," explains Schuster. "So it's important to us for trade show contacts to be forwarded quickly to the responsible sales employees." Sortimo's trade show specialists can now register leads directly at the trade show booth and transfer the address data with all additional information replicated to the individual sales teams. The sales team can see immediately whether to send informational material or contact the lead by phone.

Updates always in view

CAS genesisWorld is used in the key accounts area mainly because customer histories are highly detailed. Users can also see all address updates and new links that have been created in other departments (in Customer Service, for example) with Personal Information

Assistant activePIA. This has made it possible to reduce internal communication overhead significantly, and key account support specialists are always just one click away from the latest update.

Summary and prospects

Schuster had some final comments about using CAS genesisWorld at Sortimo: "We haven't completed the process of integrating the field service and branch offices yet, but we're already very satisfied. The system is easy to use, provides a good overview of customer histories, quickly processes trade show leads, and provides comprehensive support for marketing campaigns. That has led to a high rate of acceptance." High marks for efficiency from Schuster. In the future, the CRM Project Director hopes to integrate European subsidiaries.