



When it comes to household appliances LIEBHERR is the refrigeration/freezer specialist, manufacturing high quality fridges and freezers comprising every advantage of the very latest refrigeration technology.

CAS **genesisWorld**

## At a glance

**Industry sector: Retail / Field service**

### Objectives / Requirements:

- ▶ Comprehensive sales support comprising customer management, route planning and enterprise resource planning systems
- ▶ Targeted sales control
- ▶ Transparent documentation of customer contact partners
- ▶ Open communication between in-house and field service teams
- ▶ Centralised, structured information database for all staff
- ▶ Customer potential is exploited to the full
- ▶ Connection to / integration with field service personnel (through home office, PDA)

### Benefits and advantages

- ▶ Considerable increase in sales with the same number of employees
- ▶ One day less on the road, representing 5,000 fewer kilometres driven by each sales employee
- ▶ A decisive competitive edge, because customer and competitor information can be used for our own sales campaigns
- ▶ Transparent customer information available to all staff, representing less administration work.
- ▶ Time and money is saved with mailing shots to specific target groups
- ▶ Over-orders of advertising material and glossy brochures resulting from inaccurate estimates are a thing of the past
- ▶ Comprehensive customer information adds a personal note to customer management

# Success story

**LIEBHERR**  
**Kleimann**  
 Überzeugende Produkte & Dienste

## Comprehensive sales control

Liebherr-Hausgeräte GmbH is one of the leading manufacturers of high-quality fridges and freezers. Detlev Kleimann Handelsvertretung is one of six Liebherr dealerships. "With our comprehensive sales control system our field service staff can concentrate fully on selling," explained Detlev Kleimann, the proprietor.

Detlev Kleimann took over the Liebherr dealership for the central area at the beginning of 1999. The new proprietor quickly discovered that no sales control instruments were in place. Customer contacts were still being recorded on index cards, and no specific sales data analyses could be produced using the existing enterprise resource planning system.

### The aim: an integral solution

When the company restructured, Kleimann wanted to introduce a comprehensive solution that could schedule visiting rounds, produce visit reports, create an open communication system between in-house and field service staff, and analyse customer information. Kleimann became aware of the CAS genesisWorld customer and information management system developed by CAS Software (Karlsruhe), and of its partner Pollak Software (Karlsruhe), from his experience of the interactive Sales + Service route planning system by PTV AG (Karlsruhe).

Together, they produced an integral sales control system with the CRM solution at the centre-point, bolstered by the route scheduling system, and by Liebherr's resource planning system. "Our PS-Ware interface provides the sales team with important information from the resource planning system," explained Rainer-Matthias Pollak, managing director of Pollak Software. "This collaboration has very much proved its worth," said Kleimann in praise of his partner. "Nothing on our wish list was left unresolved. And it is affordable for a medium-sized business."

### Optimised visiting rounds

The system schedules customer visits by taking into consideration the potential of each customer, the necessary frequency and duration of visits, whether it is an initial or requested visit, and the date of the most recent visit. This information is stored in the CAS genesisWorld central customer information. Sales + Service accesses this customer information, puts together a visiting round for each member of the sales team and sends the result back to the appointments calendar in the CRM system. A data reconciliation routine then transmits the completed visiting rounds for each member of the sales team to their PCs at their home offices.

### Careful preparation and follow-up

By implementing Sales + Service it was possible to optimise visiting rounds to ensure that now Fridays are available as a general office administration day used to prepare for and follow up on customer visits. Previously this task either had to be done at the weekends, or simply did not get done.





**"CAS genesisWorld gives us a clear advantage over the competition. With the same number of employees we have been able to increase our turnover and reduce our costs – that only happens with perfect organisation."**

**Detlev Kleimann, proprietor of the LIEBHERR dealership in the central area, Neu-Isenburg**

**Project data**

- ▶ The subject of CRM was tackled in 1999
- ▶ In place since January 2001
- ▶ Support from Liebherr-Hausgeräte GmbH: comprehensive sales control recommended as a standard solution
- ▶ In use at all LIEBHERR dealerships

**Customer**

Liebherr-Hausgeräte GmbH, Biberach, Germany  
www.liebherr.de

- ▶ Part of the multinational LIEBHERR group employing more than 26,000 people at over 60 companies throughout the world
- ▶ Produces over 2 million refrigerators and freezers every year
- ▶ Sales in Germany through six independent dealerships

LIEBHERR dealership in Mitte Detlev Kleimann  
Handelsvertretung, Neu-Isenburg, Germany  
www.kleimann-web.de

- ▶ Company taken over in 1999
- ▶ Some 1,700 customers and more than 5,000 contacts
- ▶ Supplies electrical wholesalers, many retailers (mainly kitchen design studios), electrical markets and the drinks industry

**Implementing partner**

Pollak Software GmbH, Karlsruhe, Germany  
www.pollak-software.de

**CAS genesisWorld**

- ▶ Professional customer management
- ▶ Supports internal processes, increases efficiency
- ▶ Specially tailored to the needs of SMEs
- ▶ Excellent price / performance ratio
- ▶ Flexible, integratable, extendable
- ▶ Established product – winner of several awards
- ▶ Over 110 CRM specialists provide on-site support

With the CRM system preparation and follow-up is standardised and simplified in such a way that the sales personnel are able to carry out such tasks with the necessary care and attention. "Visit preparation" and "visit report forms" set out in the form of a checklist, are available on the central system: Various tasks such as "appointment confirmed", "brochures requested", or "advertising measures discussed" can be entered with a few mouse clicks. The in-house sales team can also include specific special campaigns and individual customer requests into the appointment.

**Information platform for in-house and field service teams**

"Our staff needs to be aware of the customer's correspondence with us, including faxes and emails, so that they are up-to-date with developments," said Detlev Kleimann on the subject of document management. CAS genesisWorld can be set up in such a way that every field representative receives every order confirmation and terms agreement from his own customers in list form.

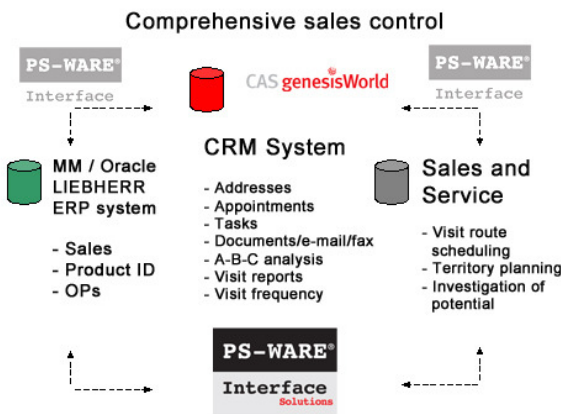
Detlev Kleimann's team receives additional support from activePIA, the personal information assistant by CAS genesisWorld. Among other things activePIA shows the birthdays of business partners and members of staff, and provides information about current appointments. "It's a shame if a customer rings, and we don't know that it's his birthday that day," said Kleimann. "activePIA adds a personal note to our customer management processes."

**Sales control**

Every week the field service staff at the LIEBHERR dealership creates approximately 200 sales reports on the system. The filter options provided by CAS genesisWorld helps Detlev Kleimann to concentrate on the exceptions – for example if no order has been made or if a customer has declined to take part in an advertising campaign. "Using this information we can discuss the steps we should take in good time," stressed Kleimann.

Additional customer information such as their product focus (including competitor products), product preferences and their participation in sales campaigns can be

utilised to address customers in line with their needs. If a competitor starts a sales campaign, Detlev Kleimann filters all those customers in which that competitor would be interested from his database. These customers are then approached with a specific "alternative offer". "I call that a practical and qualified method of sales control," stressed the canny entrepreneur.



Integral solution comprising customer management, route planning and merchandise management systems

**Investment in sales control pays off**

In Kleimann's view customer service and customer loyalty are of increasing importance to sales activities. "Now that products are becoming increasingly similar as regards equipment, quality, price and delivery service, the remaining and most important differential is how I treat my customers. We have invested in customer relationship management and have thereby achieved strong growth, but with the same number of employees", said the entrepreneur as he looked back. In my view CAS genesisWorld offers the very best to any sales organisation!"

