xRM and CRM for small and medium-sized companies
Swisslex – Schweizerische Juristische Datenbank AG are masters of innovation, not just keepers of tradition. Here, huge amounts of data are imported, refined, managed and analyzed. This is how Switzerland’s largest legal online database ensures satisfied customers. Around 34,000 users in law firms, government authorities, and institutes of science and education work with the Swisslex legal information portal at www.swisslex.ch. On average, they access paid information on legislation, case law and doctrine 240,000 times a month, and the trend is rising.

Administration and analysis dashboard

Founded in 1986, the company was one of the first online information services of its kind in Europe. Swisslex specializes in reference sources for legal information, its customers include law firms, courts, corporate law teams, trust companies, tax experts and universities. Until the start of 2006, their customer management and data analysis were performed entirely by using Microsoft Outlook and Excel. However, from mid-2005, the constant growth was no longer manageable using these manual tools. So since 2006, Swisslex has used CAS genesisWorld as its central administration and analysis dashboard, through which all of its business processes are managed.

Fully Meets High Standards

It was no longer possible to justify the internal workload for manually processing customer data and tying up valuable resources with the increasing amount of data. This, and the fast-paced growth of Swisslex were the main reasons why a professional CRM system was introduced. “There eventually came a point where we had to introduce automated processes to remain competitive,” said Marc Bloch Sommer, CEO of Swisslex AG. “We chose CAS genesisWorld and Mr. Koppenhöfer, the Managing Director of the Tübingen-based company itdesign on the basis of very specific recommendations. We knew that he was selling a good CRM system in CAS genesisWorld.” The Swisslex team requested an extensive demonstration of the CRM solution and was very quick to conclude that it fully

Dashboard: manage data optimally

Industry

Media, Services

Objectives/requirements

- Provide a dashboard which includes elements for the central administration and analysis of business processes
- Ensure a multi-layered rights system for the validation of account details
- Include an upstream service for the billing system and an interface for the accounting system
- Enable the management and analysis of marketing activities
- Ensure a flexible, scalable system for further growth

Benefits and advantages

- Enables efficient customer administration and automated reporting
- Provides centralized maintenance and administration of all customer data
- Abstracts all subscriber and rights administration mechanisms
- Sends different personalized newsletters to subscribers
- Allows the use of process marketing campaigns
- Employees can now keep track of huge amounts of data thanks to finely-tuned analyses in the dashboard
meets the high standards. The good references for CAS genesisWorld and the quiet professionalism of itdesign were key factors in the decision-making process. “The combination was a very good fit. The CRM system offers us what we need and is very powerful, able to meet requirements that we didn't even know we would have to eventually meet until now.” This provides Swisslex with scope for additional growth which because of its scalability the CRM solution is more than capable of accommodating.

Fast & efficient – roll out

The CAS genesisWorld roll out proved to be timely and trouble free, despite the processes and requirements being extremely complex. The existing address database had to be transferred, an abstraction of the subscriber and transaction management systems – essentially the “ERP system” – had to be implemented, and all of the account details had to be imported. The data from Microsoft Outlook and the existing online database were processed internally here.

» CAS genesisWorld is an efficient tool for the tasks that it is designed to perform. It provides us with the opportunity to simplify our customer and product management «

Marc Bloch Sommer, CEO

CAS genesisWorld

Project data
- CAS genesisWorld at two locations
- In use since February 2006
- Integration of Inxmail

Customer
- Swisslex AG, Zürich (CH), www.swisslex.ch
- Leading online database for legal information on the Swiss market
- Offices in Zurich and Geneva
- Founded in 1986
- More than 20 employees

Project partner
- itdesign GmbH, Tübingen www.itdesign.de

CAS genesisWorld
- Professional customer management
- Specially designed for the requirements of SMEs
- 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 20,000 companies
The roll out was an iterative process, and today, CAS genesisWorld takes all of the customer-related processes in its stride,” explained Johannes Koppenhöfer. The employees were quick to adjust to CAS genesisWorld thanks to the short training, for instance in data analysis. “They are enthusiastic about now having an extremely efficient customer management tool at their disposal,” said Bloch Sommer.

Technology for leading performers

About the CAS genesisWorld CRM System

- Today, the Swiss company has acquired new customers using the campaign management and professional e-mail marketing tool Inxmail
- Subscribers are regularly supplied with up-to-date product newsletters
- It manages all the subscriptions
- It uses the rights system to authenticate users when they log on to the www.swisslex.ch portal

Comments from other customers: www.cas-crm.com/our-customers

We now have an efficient instrument for further growth, because we can manage everything centrally,” said the employee responsible.” Today, we also maintain and manage all our data centrally. Our offices in Zurich and Geneva work using the same, up-to-date database thanks to CAS genesisWorld Web access.” For campaigns and analyses, individual data can be compiled and extracted as desired by applying filters. New products that join the portfolio of this legal services provider in future can also be added with ease to the central database. For campaigns, Swisslex breaks down its customer data, for example, by turnover, by number of transactions per customer, and depending on which segments of the legal information the customer has visited. The filter function in CAS genesisWorld is used to import the fine-tuned analyses directly into the dashboard, thus providing employees with all the information they need at a glance.

Contact us now for more information on applying CRM in Services companies.

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