

Success Story

SCHÜLLERMANN

CAS genesisWorld

CRM/XRM for small and
medium-sized enterprises



Our absolute priority:

Customer satisfaction

Schüllermann und Partner AG is synonymous with great expertise and many years of experience in tax consulting and auditing. CAS genesisWorld supports the group of companies by ensuring optimal customer care and a seamless flow of information internally.

With more than 200 employees and 5-partner companies across 12 locations in Germany, Schüllermann und Partner AG support numerous clients from both the private and public sectors of industry, Mittelstand and non-profit organizations. The company's services include the compiling and auditing of annual financial statements as well as providing consulting services in both tax and legal matters. Other services encompass business consulting and supporting clients in the implementation of their digital processes.

Clients profit from high quality standards as well as the intensive education, training and specialization of Schüllermann staff. Staff who provide client care through interdisciplinary teams made up of auditors, tax consultants, lawyers, IT-specialists and business consultants.

Digital Workplace with CAS genesisWorld

"Customer relationship management plays a primary role for us", says Roman Klein, Project Manager "genesisWorld" and Head of Marketing at Schüllermann und Partner. "Since 2019, the CRM/XRM solution has been deployed in almost all of our business areas. We needed a system that could drive our digitalization efforts forward and help us move away from the usual dependencies which organizations have, such as on Excel." We implemented CAS genesisWorld in close cooperation with the CAS partner, itdesign GmbH.



Industry

Business and tax consulting

Objectives/Requirements

- To provide professional digital support for customer relationship management
- Establish a digital workplace on one platform, move away from stand-alone solutions and Excel organization, include the DATEV integration
- Optimize processes, increase transparency while conforming to data protection
- Enable targeted and analyzable marketing campaigns
- Provide comprehensive usability while mobile

Benefits and advantages

- More time for customers: processes are more efficient and consistent, and in part automated
- Optimum cross-company cooperation thanks to the "Digital Workplace" - integrated available programmes and offering a common platform for sales, marketing and project management
- Increased success in marketing campaigns thanks to target-group specific forms of address, clearer documentation and performance measuring with reports
- All-in-one thanks to the DATEV integration – synchronization of master data and any associated relationships

"The CRM solutions makes processes more efficient and consistently realizable, and integrates existing programs", explains Roman Klein with delight.



Integrated digital sales processes

CAS genesisWorld offers a 360-degree view of customers in sales, marketing and project management. "When we receive a request, we record all the information in a digital customer dossier", explains Klein. The dossier contains the customer's current needs, contact data and details on relevant contact persons, all documented clearly in an easy to manage format. This 360-degree view of the customers does of course comply with all data protection regulations and restrictions. "The next thing we do is create a task with an opportunity. The CRM models the rest of the sales process and we can process the project efficiently and professionally: from the quote phase through to project processing and assigning different tasks to relevant employees and finally closing the project."



» Using CAS genesisWorld we have increased the success of our marketing campaigns. «

Roman Klein, Project manager
"genesisWorld" and marketing

Increased success of campaigns

"Additionally, using the Report Manager we analyze all our data." In doing so, important KPIs can be filtered and displayed clearly. This gives us a solid foundation for turnover forecasts and targeted marketing measures. "Linking CAS genesisWorld with Inxmail e-mail software has proven itself to be very useful for e-mail marketing campaigns. In the CRM solution we can filter target groups for newsletter campaigns and define distribution lists," says Klein. It is also possible to have an interface with the homepage, so that new newsletter subscriptions can be adopted from there automatically. "A great advantage of

CAS genesisWorld

Project data

- CAS genesisWorld
- DATEV integration

Customer

- Schüllermann und Partner AG
- Creation and auditing of annual financial statements, tax and legal consulting services, compilers of expert economic reports, providers of consultation services
- 12 locations nationally
- Founded 1969
- More than 200 employees

Project partner

- itdesign GmbH, crm.itdesign.de

CAS genesisWorld

- Professional customer management
- Supports internal processes, increases efficiency
- Flexible, easy to integrate, extendable
- Established product – winner of several awards
- Over 200 CRM specialists provide on-site support
- Be Being used successfully by more than 30,000 companies

CAS genesisWorld is that we have full transparency and a complete overview of the whole of our communications: We can see what information the customer has received and assign requests appropriately. Consequently, we enjoy more success with our marketing campaigns." Klein also highlights the automatic e-mail integration as another

improvement to everyday work. When we receive an e-mail from an existing customer, we can open their history directly in the e-mail solution using a MS Outlook add-in. In addition, quick e-mail archiving has proven to be very helpful, "When I receive an e-mail from a customer, I can file this e-mail with just one click to the digital customer dossier in CAS genesisWorld. From there my team and I can access the e-mail plus any attachments at any time."

All in one thanks to the DATEV integration

Another great feature for a tax and consulting company is a link to the accounting and bookkeeping software DATEV. For this a standard interface is used which keeps data from both systems synchronized with each other. For example, address master data and any associated relationships and responsibilities are synchronized so that at any point in time, the most up-to-date data is being used, thus preventing the need for any duplicate data management.

User-friendliness baked-in

Schüllermann employees work predominantly with the Web Client, this gives them the ability to access the CRM data from anywhere via a browser. "The user-friendliness is super", added Roman Klein. "You can find what you are looking for quickly and you always have everything in view. It just makes everything easier, especially when working



from home given the distances involved, everyone on the team can access the data as long as they have been given sufficient rights to do so."

Conclusion

A very good decision was to make use of the itd Quick Start implementation method, which ensures that the standard functionality of the CRM software is available to use in just a matter of a few days. While all the employees were already being productive by working with the basic functions and becoming familiar with the software, the evaluation and implementation of the DATEV interface could continue in the background. Schüllermann continues to work closely with the CAS partner itdesign. CAS genesisWorld is constantly being expanded and new processes are being implemented to further develop the CRM solution with the law firm.



More testimonials:
www.cas-crm.com/references

Find out more



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