

Success Story



CAS genesisWorld
CRM/XRM for small and
medium-sized enterprises



Everything in Flow

CAS genesisWorld

NIVUS ensures that waterworks, wastewater treatment plants and sewer networks run smoothly. The company stands for precise technology, as well as consulting and service at the highest level. With the CRM/XRM solution CAS genesisWorld, all the wheels in the company mesh together when it comes to customer service.

For over 50 years, NIVUS has been developing, producing and supplying measurement technology for the water industry: for example, specific systems for flow and level measurement, flow velocity detection and water quality measurement.

With nine international subsidiaries and more than 40 distributors worldwide, the Eppingen-based company is one of the global leaders in this sector.

As the key to ideal measurement results, NIVUS relies on the best advice and service in the operation of its equipment. Customers benefit from decades of experience in the NIVUS team. To further improve the existing solutions, an in-house development team researches basic technologies for future generations of equipment.

CRM/XRM for a 360-degree view

"Our portfolio includes both products and various services," explains NIVUS Sales Manager Stephan Frank. "Of course, we would like to present this wide range as coordinated solutions to the customer. Therefore, one hand must know what the other is doing. This is precisely why we were looking for a CRM solution that gives us a 360-degree view of our customers." In addition, the flow of information between departments had to function smoothly, adds Frank Schmidt, a sales representative in the field. "I need to know, for instance, when the service team will be able to fit a measuring device outdoors, which I quoted for. I also need to know what the project manager discussed



Industry

Developer, manufacturer and supplier of measurement technology for the water industry

Objectives/Requirements

- Introduction of a central information system
- Optimization of interdepartmental cooperation, smooth flow of information
- Targeted customer support through system-supported customer evaluation
- Connection to existing ERP system
- Mobile, location-independent availability of customer-related data

Benefits and advantages

- Always up-to-date all-round view of relevant customer and interaction data
- Close customer loyalty thanks to a tidy collection of knowledge - the more points of contact, the greater the loyalty.
- Time and money saving: corporate memory immediately at hand in the event of team changes
- Efficient interdepartmental collaboration with system-supported handling of internal processes
- Qualified information visualization thanks to smart reports and evaluations
- High flexibility and growing system offers continuous adaptation to processes and individual dashboards according to company-specific requirements

with the customer lately and what information the marketing sent out. Simply in order to provide the customer with all-round, optimum support and service."



» CAS genesisWorld provides us with the all-round view that we need. The more points of contact we have with the customer, the more we can bind them to us. «

Stephan Frank, Sales Manager

With the CRM/XRM solution CAS genesisWorld, NIVUS has found a solution for these requirements. "Since 2020, CAS genesisWorld has provided us with the all-round view we need," says Stephan Frank. "We can use it to store all the information that makes sense to us and the business."

Previously cumbersome - today autonomous

"When I used to process a new contact, it was always very laborious," reports field sales representative Schmidt. "I forwarded the e-mail to the office staff, where it was manually entered into our ERP Professional system." Today, CAS genesisWorld as a central platform bundles the collected customer information and connects to the ERP system via an interface. This enables efficient access to all the company data.

"I simply add the address in the CRM to the address manager, which automatically fills out an address mask for the new customer," describes Schmidt. All important contact persons and contact options are stored in the digital customer file. "And I can create offers, so-called sales opportunities, and link them to the respective customer. I follow up on these sales opportunities in the CRM, and can then follow up with the customer after a certain time and note the status of the offer such as - waiting, won or lost, and store corresponding notes."

Full overview as a "huge advantage"

This information is also dispatched automatically to the sales office. All employees are thus always up to date. "If a customer doesn't reach me, a colleague in the office can take the call and seamlessly continue the support," Schmidt is pleased to say. "You simply open the file, see exactly what's been going on, and can competently conduct the customer conversation

CAS genesisWorld

Project data

- CAS genesisWorld Platinum Edition
- Modules: Form & Database Designer, Report, ERP connect
- Interface to ERP system "Professional ERP"

Customer

- NIVUS GmbH, www.nivus.de
- Manufacturer of measurement technology and software solutions for process engineering in the water industry
- Active worldwide: 9 international subsidiaries, over 40 distributors
- Year of foundation: 1967
- approx. 140 employees

Project partner

- plan IT Online GmbH, www.planit-online.de

CAS genesisWorld

- Professional customer management
- Supports internal processes, increases efficiency
- Specially designed for the requirements of SMEs
- Mobile CRM solutions with CAS SmartDesign for smartphones, tablets and browsers
- Very good price-performance ratio
- 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 30,000 companies

without having to contact me. That's a huge advantage that we didn't have before we introduced CAS genesisWorld."



Digital memory for the company

With this seamless and uncomplicated documentation, CAS genesisWorld is now the "memory" of the company. When there is a change in the team, no information is lost, Schmidt points out. "A new employee can see where their predecessor was in previous years as well as what they discussed with customers. By using CRM the complete customer history is preserved. That saves us both time and money." The sales representative also appreciates the ability of the Web client of CAS genesisWorld for mobile working. "Regardless of whether it's on a smartphone or tablet, I'm always up to date. If a colleague was on the phone with the customer a minute before, I see that in the CRM. I use every free minute on the road to feed the system with information. And at the customer's site, I have everything I need with me with CAS genesisWorld: for example, any presentations I am planning on giving are entered in the system."

A solution that grows with you

Sales Manager Frank emphasizes the system's good usability. "You can customize quite a lot yourself with it and implement your ideas in a very short time." This is another reason why they chose CAS genesisWorld, he says, because: "This CRM solution grows with our company."

Smooth implementation

The CAS partner – plan IT were responsible for the successful deployment of CAS genesisWorld at NIVUS, they successfully implemented the new CRM software in 2020 despite adverse accompanying circumstances due to Corona.

Strong through individual adaptability

"We have extensively customized the CRM solution at NIVUS," reports Stephan Schotten, CRM project manager at plan IT. For example, an interface to the existing ERP system was specially developed to give employees access to all relevant company data in the CRM so that the program can develop its full strength in their daily work. "Once again, the flexibility of CAS genesisWorld in adapting to the individual needs of a company has proven to be a great advantage. And agile customer support also means that we have, of course, already thought ahead. Further adaptations and extensions are planned so that even more employees and company divisions can benefit from the digital workspace as a central platform." In conclusion, Larissa Halbgebauer, Head of Sales and Marketing, states: "We have a good and long-standing relationship with NIVUS in various areas, and not only because of our local proximity. So as you can imagine, we were very pleased that we were able to realize a successful project of mutual benefit in the area of CRM."



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

Find out more



Contact us now for more information on applying CRM.
Phone: +49 721 9638-188
E-Mail: CASgenesisWorld@cas.de
www.cas-crm.com



CAS Software AG
CAS-Weg 1 - 5
76131 Karlsruhe

