



Success story

SCHAEFER

**CAS Engineering**

xRM and CRM for small and medium-sized enterprises



# Get on top with a professional xRM system

Whether you are riding in an elevator in the Allianz Arena in Munich, the metro in Barcelona, "The Palm" hotel in Dubai, or wherever in the World you are using an elevator, one thing is certain: SCHAEFER is most probably riding with you. SCHAEFER operates as a world-wide manufacturer of elevator components. The company plans, organizes, produces and sells control panels and pads, buttons and displays for elevators.

After deciding to take its global relationship management with customers, traders and cooperation partners to a new level, SCHAEFER a 200 strong company from Sigmaringen, opted for CAS Engineering. This CRM industry solution is designed for engineers and manufacturing companies.

## Customer service as a priority

SCHAEFER wanted to maintain their constant high standard of service quality. Consequently, they began to search for a sophisticated ticket system to fulfil this goal and discovered CAS Engineering. CAS Engineering is based on the flexible CRM solution CAS genesisWorld. The Helpdesk functionality promised to deliver the professional support the company was looking for with regard to their customer services and complaint management procedures — as well as other diverse functions.

## Implemented on a cross – departmental basis in just 2 months

Working closely with the company directors, a project team consisting of representatives from marketing, sales, support, quality management and IT composed the technical specifications for the new system with the aim of revolutionizing the way the company worked with all their business contacts.

Ilona Hanke and Andreas Stötzner, the project managers, were full of praise, not just for the "Software made in Germany" seal of approval, but also for the helpful support and training. The implementation was completed in record-breaking time: from the first address import to setting up the bidirectional interface with the existing infor-ERP-system and d.3 document management system it took just under 2 months.

## SCHAEFER

### Sector

Manufacturing companies

### Objectives and Requirements

- Sophisticated ticket system to ensure high-quality service
- Integrated Groupware functions
- Analysis and management of marketing activities
- Ensure mobile access world-wide for sales reps
- Integrate with existing ERP software infor
- Integrate with the document management system d.3

### Benefits and Advantages

- A flexible, comprehensive CRM solution with integrated Helpdesk module
- Fast, professional handling of customer enquiries
- 360 degree all-round customer view
- Mutual documentation of business partner relationship networks
- Sophisticated selection functions for target-group specific, world-wide marketing actions
- Comprehensive knowledge database for countries, markets and their special features
- World-wide access to all relevant data

Since its implementation, CAS Engineering is being used in all of the company's departments from the Board of Directors to the International Sales and Marketing department, the Purchasing department as well as the Planning and Construction office. Currently, 60 workstations are using the solution on a daily basis providing support to both customer and project management.



## Helpdesk scenario

The handling of customer enquiries is now consistently professional: whether dealing with a support request or a customer complaint. Any member of staff can log a customer enquiry, because all the enquiries are processed in CAS Engineering immediately and then assigned to the respective department. This ensures that the whole process from its inception to its release by the quality department is streamlined and quicker than before. Frau Hanke: "We have managed to increase customer satisfaction and trust as a direct consequence of creating more transparency using CAS Engineering."

## Communication is everything

Ilona Hanke, Head of Sales International, and her colleagues are also delighted with the integrated groupware functions and the telephone integration: "Communication is everything in sales", she states, "the virtual dossier captures all appointments, tasks, e-mail, documents and contact information on all our contact partners and projects and displays them in one clear overview. This gives us a fantastic 360 degree all-round view of our customers." Now, we can also carry out evaluations of our trade-fair visitors in a matter of a few mouse clicks, these are functions that before the introduction of CAS Engineering were simply impossible.

## Intelligent xRM now also available for sales reps

"Using CAS Engineering we can map our relationships with our business partners and also document the relationships between our business partners."



» Since we introduced CAS Engineering each employee saves at least an hour a day spent on admin. So of course, it is no surprise that my colleagues love their CRM. «

Ilona Hanke, Head of Sales International

## CAS Engineering

### Project data

- CAS Engineering used by 60 workstations
- Interface to the ERP software infor
- Integrated with the document management system d.3
- Mobile use via Citrix

### Customer

- SCHAEFER GmbH, Germany  
[www.ws-schaefer.de](http://www.ws-schaefer.de)
- Operating world-wide as a component manufacturer for control panels and boards, as well as buttons and displays for elevators
- Established 1964
- More than 200 employees

### Project partner

- aptus IT GmbH, Backnang, Germany  
[www.aptus.de](http://www.aptus.de)

### CAS Engineering

- Targeted, efficient project management
- Integrated service management
- Transparency through centralized information
- Mobile access
- Time recording and billing
- Structured sales with turnover forecasts
- Targeted marketing
- Long-term company success



Our database contains all of our contact data for our: traders, planners, competitors, architects and additional component manufacturers. As a result, our sales team can steer our sales channels precisely so that our marketing actions are target group oriented.

Linked information in CAS Engineering can be accessed at any time when you are on the go by using Citrix – from anywhere in the World. This transparency is of major significance to the company's sales representatives: because since the software was introduced they have been entering their appointments and reports into CAS Engineering.

### High levels of flexibility

The high degree of flexibility means that requirements for a new knowledge database for countries and markets and their special features can be realized in a matter of hours. Now, you can get the answers to the following questions at the touch of a button: Which specialist magazines and associations can be found in the country? How many customers and potential customers do we have? Where do the trade fairs take place and how often? In fact, with the new system, any newspaper and magazine articles or special reports as well as information from the Internet or information from hand-written notes and so on, can all be organized according to country or market: and subsequently made available to all employees electronically.



Comments from other customers:  
[www.cas-crm.com/our-customers](http://www.cas-crm.com/our-customers)

Find out more



Summary: save time effectively with one solution

The amount of time saved since the introduction of the software solution is impressive: so much so that every employee saves at least 1 hour per day on admin duties. "An additional 4 hours a week are saved by those colleagues who previously worked with Microsoft Excel lists", commented Andreas Stötzner, IT Project Manager. Based on experience, both the CRM Project Managers, strongly recommend that before implementing a new software solution, all the stakeholders need to sit down together and work out the detailed technical requirements and ensure that the project team consists of key users from each of the different company areas. "This helps to create the necessary employee acceptance right at the start of a project. And it won't take long before your colleagues love their CRM."

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

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