



Success Story

Mikro Kapital

CAS ^{globe icon} genesisWorld

CRM/XRM for small and medium-sized companies



Fit for digital business with CAS genesisWorld

When looking for a solution to increase efficiency and digitize their sales processes, Mikro Kapital found the CRM system CAS genesisWorld to be the best option for their company with multiple offices in different countries. Despite the pandemic, the company has continued the modernization process and today, thanks to CAS CRM, they can provide their customers with high-quality interaction and their employees a professional working tool.

Mikro Kapital is a multinational non-banking financial institution (NBFI) that specializes in granting microfinancing opportunities to SMEs in various fields of activity. The company supports entrepreneurs that need quick access to capital to transact their business by providing accelerated processes for data processing and risk assessment. The Mikro Kapital Fund is focused on using microfinancing techniques to invest in small businesses across developing areas of the world in the CIS, Europe, Central and East Asia, and Latin America.

The starting point for CRM implementation

The Mikro Kapital Group has a well-defined digitalization strategy that aims to expand customer interaction online as well as automate workflows and increase employee work efficiency. For this purpose, the company has initiated the process of modernizing its business by implementing a customer relationship management system. Mikro Kapital aims to both change the way agents work by removing information stored on paper or excel files, and automate the processing of leads obtained online.

In the absence of a modern CRM system, employees were forced to enter synchronous data in various excel files as well as in the financial application that processes credit applications without easy access to the relevant customer information or the history of relations.



Sector
Financial services

Objectives/requirements

- Seamless digitalization strategy aiming to broaden customer interaction in the online space, automate work processes, and increase productivity
- Modernization of workspaces by digitizing information and utilizing digital support
- Mobile access to entire customer information
- Automation of web-based lead management
- More transparency in management decisions
- Easier task management
- Optimization of onboarding for new agents

Benefits and advantages

- Sustainable digital transformation with continuous focus on market demands thanks to flexible and custom-fit CRM solution
- Shorter run-through for customer requests through complete access to history and quick validation of financial data
- No more data redundancy as all data are managed, accessed, and systematized on one platform
- Faster onboarding for new employees and continuous customer services by access to complete customer dossiers
- Automatic takeover of new leads from the online environment by integrating the website with the CRM system
- Total mobility for all field staff

Moreover, the management team did not have an overview of the activities and workload of their employees and could not easily assign tasks to teams.

The main challenges:

- Customer information stored in individual paper files (agenda) Redundant data entries in both Excel files and the financial application
- No options to automatically record and process any leads generated online
- Missing overview of team activity, challenges in workload and follow-up processes
- Difficult training period for new employees

Choosing the solution CAS genesisWorld

In the context of these challenges and requirements, Mikro Kapital set out to find a fitting CRM system and project partner. The company has evaluated several local and international CRM systems, focusing on the solutions' ability to meet the specific requirements of a non-banking financial institution (NBFi): simplicity in use with high-quality implementation services.

At the end of the process, Mikro Kapital has chosen CAS genesisWorld CRM and a CAS Gold Partner, the company Soft Net Consulting, for a pan-European deployment of the system.

» The search for the CRM system has been intense and we were looking at both local and international solutions. We have chosen CAS genesisWorld because it has the necessary functions to support our sales workflows, but also a very intuitive interface, easy to use by all employee groups. The level of local support offered by the CAS Gold Partner, who convinced us from the start that they were equipped with the skill and ability to carry out this project, carried a lot of weight in our decision. «

Grigore Fusu, Marketing Manager, Mikro Kapital Romania



CAS genesisWorld

Project data

- CAS genesisWorld Premium
- Integrated finance management system, website integration

Customer

- Mikro Kapital Romania, www.mikrokapital.ro
- Micro financing services for SMEs
- Part of Mikro Kapital Group
- 53 employees
- Active on the Romanian market since 2016
- +2,000 customer base

Project partner

- Soft Net Consulting srl, www.softnetconsulting.ro

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
- Flexible, easy to integrate, extendable
- Established product – multiple award-winning
- Used successfully by more than 30,000 companies
- Very good price-performance ratio

CAS genesisWorld was the winning solution because it provides:

- Advanced functionalities for sales workflow management
- A simple and intuitive interface, suitable even for people without digital knowledge
- Easy to use on any mobile devices
- Good level of local support, through Certified partners
- The international footprint of the solution, with the possibility of replication in other branches of the group

The implementation project of Mikro Kapital had to meet additional challenges and requirements as it was undertaken during the height of the pandemic. The company involved several key people in the organization to define and establish workflows as well as how to capture, record and report data. An important element was the gradual and continuous familiarization of users with the new system so they could understand its benefits and easily adopt its processes.

Additionally, the implementing certified CAS Partner ensured the integration of CAS genesisWorld with the financial solution used by Mikro Kapital and the company website for automatic data retrieval and bidirectional data exchange.

At the end of the project, all employees participated in extensive training sessions to learn the new way of working.



» The implementation went well, but due to the pandemic, it took longer than originally planned. In such a project, during which new requirements or unexpected situations arise, it is difficult to state a very accurate estimate. The most important thing is that, in the end, we managed to move the sales and verification process into the CRM system and to significantly change the way we work in the company. «



Grigore Fusu, Marketing Manager, Mikro Kapital Romania

Advantages and benefits

For Mikro Kapital, the implementation of CAS genesis World is an important step towards digitalization as a strategy to align with the current requirements of their business environment.

Investments in technology have made Mikro Kapital the first NBFi in Romania to offer customers access to an online account for monitoring rates and payments, as well as facilities for automatic pre-approval of credit applications.

The CRM system helps you to establish coherent/consistent sales workflows. Employees are more organized, have visibility on workflows, and can prioritize their tasks to focus on the most promising opportunities.

Now, Mikro Kapital provides customers an enhanced experience by reducing response time and request processing. Moreover, Management has access to consolidated reports on company activity and employee performance indicators.

The most significant benefits include:

- **Shortened the processing time of customer requests.** The Mikro Kapital sales agents have access to the complete history of interactions with each client. Furthermore, they can access financial information through integration with online profile sites, which allows for quick data verification and validation.

- **Elimination of redundant data entries.** Currently, Mikro Kapital employees enter data only in the CRM system, and from here they are automatically taken over in the financial management application. Users gain time, errors are eliminated, and requests are processed faster.
- **Quick onboarding for new employees.** As the CRM system stores all customer information, new employees can immediately access their assigned account files, which ensures continuity of interactions. Thus, new employees become productive in a shorter time.
- **Automatic takeover of new online leads** by integrating the company website with the CRM system. The data volunteered by potential customers automatically reach a manager who assigns activities according to availability and monitors activity development. As a result, no potential customer can accidentally be forgotten.
- **Increased customer retention** via automated customer communication. Based on the recorded data, the CRM system automatically generates customer information flows with e-mail and SMS notifications so that the customers stay informed about the company's activity.

- **Increased employee mobility.** The Mikro Kapital team is very active in the field and they need to access data anytime and anywhere. The CAS genesisWorld mobile app facilitates working while on the go and substantially increases efficiency.
- **Quick access to activity reports.**

For Mikro Kapital, the implementation of the CAS genesisWorld CRM system and the collaboration with CAS-certified partners represents a big step forward on their path toward digitalization.

The CRM system has helped their teams to better organize their sales processes and quickly access customer information. Thereby, the company manages to accelerate the flow of financing, but also maintains visibility and control over the business.

» The implementation of CAS genesisWorld is part of the company's digitalization strategy. We have several projects in the works which help us to be closer to the clients and to offer them prompt and high-quality services. «

Grigore Fusu, Marketing Manager, Mikro Kapital Romania



More testimonials
www.cas-crm.com/references

Find out more



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