

# Success Story



**CAS** genesisWorld

CRM + AIA® for small and medium-sized enterprises



# CRM guides the service perfectly + transparently

OCULUS Optikgeräte GmbH from Wetzlar, Germany has been a global partner for ophthalmologists, optometrists, opticians and occupational physicians for over 120 years. For this clearly defined group of users, the company develops first-class instruments for ophthalmic diagnostics. "The high demands of our customers and the continuous development of technologies are the benchmark for us," says Oliver Schmidt, IT Project Manager. Over 55% of OCULUS' sales are realized in foreign markets. More than 300 employees work at the OCULUS headquarters in Wetzlar. More than 60% of them work in research and development as well as manufacturing and customer service. "With nine company-owned subsidiaries and over 200 dealers in more than 80 countries, we are there for our customers around the globe," Oliver Schmidt emphasizes the internationality of his employer.

## Making sales processes transparent

"The trigger for the introduction of a CRM system was the search for a product configurator to better manage our sales," recalls Oliver Schmidt. "What we were missing was a tool that could be used to document the initiation of contact and the customer relationship." Our selection process criteria quickly reduced the number of potential providers who could implement an appropriate solution.

"The decisive factor in favor of CAS genesisWorld was the fact that, with CAS Software AG, we had found a provider that could offer both fields, i.e. product configurator and CRM. Another very important aspect was the close proximity to our implementation partner CRM CONSULTS in nearby Wettenberg. Another big plus for us, was the fact that we could also easily communicate with the software house directly ourselves, in this case CAS Software AG. " As we are



## Industry

Healthcare/Research

## Objectives/Requirements

- Source a medium-sized company/provider that combines CRM, ERP and product configurator in one system
- Mapping of company processes or workflows for sales, service, complaints
- Support of marketing activities, project management and the integration of document management
- Better address quality, evaluations/reports, integration of the telephone system

## Benefits and advantages

- Effective interaction of CRM, ERP systems incl. smart product configurator (CAS Configurator Merlin)
- Better customer service through well-informed field service with mobile access to all customer interaction data
- Simplification of processes through automated workflows, facilitation of routine tasks
- Targeted marketing measures thanks to comprehensive selection options and efficient organization of seminars, etc.
- Analytical CRM with just a few mouse clicks via data relevant for decision-making

also a medium-sized company, we see eye-to-eye, which makes it easier to reach a consensus.



## Extract hidden knowledge for all employees

Instead of many data islands in the individual departments, incomplete customer profiles and inconsistent nomenclature of master data, OCULUS wanted better address quality, the possibility of evaluations and service reports, the integration of a telephone system, the mapping of company processes or workflows for sales, service and customer complaints. In addition, a connection to the existing ERP solution, support for marketing measures and project management were important. "We want to absorb the "hidden knowledge" from the individual departments and conserve it in the CRM as well as in the product configurator," says project manager Oliver Schmidt about the requirements.

## Transparent service thanks to CRM

OCULUS uses CAS genesisWorld to control all service processes: When a service request comes in by phone or e-mail, a ticket and an RMA number is generated via the CRM and the team responsible for the device series and relevant departments is informed.

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*Oliver Schmidt, Project Manager IT*

## CAS genesisWorld

### Project data

- CAS genesisWorld

### Customer

- OCULUS Optikgeräte GmbH, [www.ocular.de](http://www.ocular.de)
- The company develops instruments for eye diagnostics
- Over 300 employees
- Represented internationally in over 80 countries with nine subsidiaries

### Project partner

- [crm consults GmbH, www.crm-consults.de](http://www.crm-consults.de)

### CAS genesisWorld

- Benefit from corporate processes and access the latest customer data in one central CRM + AIA® solution
- Professional customer management increases efficiency
- 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

Documentation is important in service, for instance, cost estimates have to be created and stored and customers need to know whether a device has to be sent in for service or whether it can be serviced remotely, or by a service technician on-site. This is now documented comprehensively and transparently in our CRM/XRM. Whatever the outcome, the responsible field service employee – who is our 'face to the customer' - can see the status anytime at a glance so that they can give the customer accurate updates on the service.



### Deployed online quickly and in good time

"The cooperation with CRM CONSULTS was always very collegial and professional" emphasizes Oliver Schmidt. The CRM implementation followed a clear pattern and was neatly managed according to a predefined plan with different phases. Here, the use of key users in particular was a decisive success factor. They brought the different requirements from the departments into the project and acted as multipliers in the departments themselves. "The "train the trainer" principle was also one of the approaches

here that got our CRM up and running in not time, with no fuss, so that it was accepted quickly by the rest of the team." Today, OCULUS also uses CAS genesisWorld to organize training courses and seminars as part of the OCULUS-AKADEMIE via the event module. The next step is to map the organization of national and international dealer training in CAS genesisWorld. "Because we need to keep our dealers fit for consulting and service," says Oliver Schmidt. In addition to the desktop and web client, the smartphone and tablet app is currently being expanded based on the OCULUS experience, "This is also being well received."



More testimonials:  
[www.cas-crm.com/references](http://www.cas-crm.com/references)

Find out more



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