

## Success Story



**CAS** genesisWorld

CRM + AIA® for small and  
medium-sized enterprises



# CRM for exciting relationships

Trusting customer relationships is the number-one priority at Spezial-Transformatoren-Stockach GmbH & Co. KG (STS). To ensure modern relationship management, STS counts on the CRM solution CAS genesisWorld, including a seamless connection to Infor COM.

## Customer journey at a glance

"We build sophisticated components", explains Josua Rückert, Head of IT at STS. "Trust plays a major role in what we do. Good relationships with our customers and partners have always been important and this is something that we actively pursue on a daily basis." To ensure that this continues to be the case in these times of digital communication, the company decided to invest in a modern customer relationship management solution (CRM) to optimally map all the digital and personal touchpoints encountered during the customer journey.

"Before we implemented the CRM solution, it was only possible to maintain a good overview with a lot of effort," recalls the digital expert. Granted. The data was all available, however, it was spread across different areas and in different systems, or even only available in individual note form. "It was difficult to collate information and link it efficiently," explains Rückert. This made mobile work particularly tedious. Rückert and his project team defined their requirements for a central CRM solution, which initially, at least, was supposed to herald a new digital era for the sales team. The future-proof system should map all the phases and processes of the entire customer journey from initial requests and contact data, through to the qualification of new leads, order management and invoice generation. They wanted better address management, the ability to track



## Industry sector

Electronic engineering

## Requirements

- A modern CRM solution that fits in with existing infrastructure and the highest levels of data security
- Central platform with bidirectional synchronization to the Inform COM system
- Able to map all touchpoints during the customer journey
- Enable mobile working with access to all relevant data
- Also function as a repository of ideas and starting points for use as an overarching platform for different areas of the company

## Benefits and Advantages

- Trust and proximity to the software solution made in Karlsruhe, CAS philosophy and sustainability
- Continuous improvements in efficiency and reduced organizational efforts, for example, using the aConnect integration component means we do not have to change programs to access important ERP and DMS system data
- Gapless 360-degree view of all processes thanks to the customer centric platform on which all the individual information is linked together thus forming valuable information (for example individual dashboards)
- Enjoys wide acceptance, promotes good security and increases enjoyment at work as well as being intuitive to use

visit reports and opportunities transparently as well as comprehensive reporting and evaluation options. Efficient task assignment should strengthen collaborative working.

The CAS philosophy was convincing

In the next step, sales, field service and management all created their respective user stories containing their functional requirements. Using these requirements as a starting point, STS assessed various CRM providers and checked the extent to which they covered the individual requirements. "The solution also has to fit into our existing infrastructure, both in terms of IT integration and also in terms of data protection. Other crucial factors also included good support and the capability to grow with us flexibly", says Rückert.



» CAS's philosophy impressed us. They focus on relationships with – customers, but also with employees, suppliers and partners. This way of thinking was a perfect fit for us. «

Josua Rückert, Head of IT at STS

The company decided on CAS genesisWorld. The CRM solution from CAS Software AG met all our functional requirements – and scored extra points with some non-technical factors. "A solution from an SME for other SMEs was very important to us", explains Rückert. "And the CAS philosophy impressed us. They focus on relationships with – customers, but also with employees, suppliers and partners. This way of thinking was a perfect fit for us. Additionally, it's good to know that the software is developed in Karlsruhe, and that if need be we can have personal contact with the company as well as the fact that solutions from CAS Software are sustainable and future-proof."

## Integration of CRM and ERP

The support provided by the CAS partner aptus IT GmbH proved its worth during implementation. "It was ideal that aptus knows both worlds, CRM and ERP, and can optimally connect CAS genesisWorld with Infor COM via its own integration component aConnect," says Rückert. Automatic, bidirectional synchronization enables us to transfer master data, products and vouchers seamlessly into the CRM solution. The result is a gapless 360-degree view of all



## CAS genesisWorld

### Project data

- CAS genesisWorld Platinum Suite
- Integration to Infor COM, DMS D3 from develop

### Customer

- STS Spezial-Transformatoren-Stockach GmbH & Co. KG, [www.sts-trafo.de/en/](http://www.sts-trafo.de/en/)
- Established in 1973
- More than 190 employees

### Project partner

- aptus IT GmbH, [www.aptus.de](http://www.aptus.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
- CAS products being used successfully by more than 30,000 companies worldwide



processes. "A great added value is that with aConnect we can flexibly and individually define which fields or tables we transfer."

### A full overview is just a click away

In the meantime, we have 15 users working with CAS genesisWorld, via the Mobile App and via the web client in the office. "As the system administrator, I appreciate how easily masks and workflows can be customized. This makes the solution extremely flexible", reports Rückert. "The intuitive and consistent SmartDesign makes it quick and easy for users to find their way around. The simple understanding of where to find what ensures acceptance, safety and more enjoyment at work. As soon as you understand that everything is linked together, for example, products, opportunities, tasks and visit reports, then the way you work changes fundamentally. It only takes a click in your individual dashboard and the digital customer dossier displays all the information you need bundled together for your convenience. Everyone is on the same page and we distribute tasks within the system", Rückert finds the address assistant especially practical. "That is a great feature right at the start of a customer journey. I simply scan the business card of a new contact or drag an e-mail signature directly into the CRM solution and the data is sent automatically to



the respective fields - without any manual input. That is a small, but powerful element that saves a lot of time."

### CRM with potential

In future, the solution will help to strengthen the collaboration between the technical service team and the product development. Rückert see more potential in the area of customer service and complaints or in process planning in the production area. "We can imagine using the solution as an interdepartmental platform across all the different areas of the company." At STS, we definitely take a broader view of relationships. For Rückert this means, for example, mapping things like supplier relationship management in the CRM solution. "In future, we will be faced with new, exciting issues. And I am looking forward to addressing them with CAS genesisWorld", states Rückert.



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

Find out more



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