

Success Story



CAS genesisWorld

CRM + AIA® for small and medium-sized enterprises



CRM solution provides competitive advantage

With a professional customer relationship management approach, ELFLEIN sets new standards in the transport and logistics industry. The transport specialist's team has optimized their work processes with the CRM solution CAS genesisWorld and can fully focus on customer needs.

Brief retrospective

"When I first started eleven years ago, we were a team of 350 employees, a small administrative unit, and Mr. Elflein was still writing most of the quotes himself. Today, we have over 1,200 employees, and both Transport and Logistics have their own dedicated sales departments. Managing this scale just isn't possible without professional digital processes - especially in such a highly competitive industry. Nowadays, that means: you need a CRM solution," says Stefanie Kotschenreuther, Managing Director of Sales and Marketing at ELFLEIN, explaining why the transport and logistics specialist implemented CAS genesisWorld.

Founded in 1932, the family-owned company combines expertise in transport and logistics, with a focus on the automotive industry as well as paper and food transport. Before implementing the CRM solution, the team at the Bamberg headquarters faced the challenge of managing customer information and communication histories in a decentralized way, relying on Excel spreadsheets and distributed storage systems in Outlook and other drives, explains Ulrich Rost, responsible for Tender Management at ELFLEIN.

"It was clear the team needed a central platform to consolidate all relevant information in one place. Our goal was to collaborate more flexibly and efficiently and, above all, to manage our customer relationships more professionally," adds Stefanie Kotschenreuther.



Industry

Transport and Logistics

Objectives/Requirements

- Consolidate of information on a central platform, moving away from Excel lists and dispersed storage systems
- Increase competitive advantages through digital transformation
- Enable more flexible and efficient work processes focused on customer needs
- Integrate logistics-specific requirements into the CRM system
- Provide data analysis for informed business decisions

Benefits and advantages

- Enables rapid implementation thanks to essential standard CRM functions
- Ensures a high degree of customization for various tasks, with personalized dashboards that don't require programming skills
- Incorporates extensive, company-specific features, such as a pricing matrix for variable customer pricing based on diesel price fluctuations
- Provides a tailored solution for proposal management in Key Account Management, combining standard processes with individual customer requirements
- Allows comprehensive reporting and analysis tools enable well-informed, forward-looking business decisions

Flexibility wins the day

After a thorough evaluation of various CRM systems, the decision landed on CAS genesisWorld. "The flexibility and high level of customizability really won us over," reports Thomas Machwitz, Head of Key Account Management



Logistics. Another key factor was the performance of the CAS partner mediendesign AG, whose CRM experts implemented the solution and now host it in a private cloud.

Implementation: quick and intuitive

Accordingly, the implementation of CAS genesisWorld was impressively swift. Within just three months, all core functions were up and running. Many of the features ELFLEIN required were standard features in CAS genesisWorld: a digital customer dossier that provides a 360-degree view of all customer and project data at the touch of a button, easy import of contacts by photographing business cards, and the integration of telephone and email systems.

“The CRM cockpit is the central platform for all the tools we need in our daily work. Thanks to the incredibly intuitive interface, the entire team quickly adapted to the new CRM,” says Rost.

Flexible pricing matrix - CRM to the rescue

The CRM solution’s flexibility also allowed for highly customized, company-specific features: a pricing matrix, for instance, enables ELFLEIN to manage variable customer pricing depending on diesel price fluctuations directly within the CRM. Another such feature is the automated creation of PDF summaries after meetings.

A year after implementation, no one at ELFLEIN would want to go without CAS genesisWorld. “Everything runs smoothly, and the CRM has simply become part of our daily routine,” says Stefanie Kotschenreuther. “My personal goal is to establish professional key account management as a model for both internal and external departments-, and a

CAS genesisWorld

Project data

- CAS genesisWorld Premium
- Modules: Report, Form & Database Designer

Customer

- Elflein Holding GmbH, www.elflein.de
- Specialist in transport
- Founded in 1932
- Over 1,200 employees

Project partner

- mediendesign AG, www.mediendesign.de

CAS genesisWorld

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



» My personal goal is to establish a professional key account management team as a model for internal and external departments. A customized CRM tool tailored to our customers' needs is essential for this. «

Stefanie Kotschenreuther
Managing Director of Sales and Marketing

customized CRM tool that is tailored to our needs and those of our customers is essential for this." Key Account Management is particularly proud of the CRM's tailored solution for quote management, where standard processes and individual customer requirements in the logistics industry are now visible and easily accessible to everyone.

Analytics and marketing

"We're currently working on generating deeper reports, such as annual business summaries. CAS genesisWorld provides options for highly detailed analyses, and we want to leverage this potential with our well-documented CRM data," shares Kotschenreuther, giving a look ahead. The CRM will also play a greater role in marketing. ELFLEIN is already seeing excellent results with newsletter distribution, where recipient lists are managed directly in the CRM and can be filtered by topic as needed.



"At the end of the day, our goal is to actively shape our relationships with customers." This focus on relationship-building is even reflected in the little extra touches, like the annual holiday gifts. "And of course, as a Bamberg-based company, we enjoy sending out authentic Franconian pralines. If we learn that a customer prefers no alcohol, a single click in our CRM ensures they'll receive the alcohol-free version going forward. Personal customer care can be that simple."



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

Find out more



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