CAS genesisWorld

CRM/XRM for small and
medium-sized enterprises

CAS SOFTWARE

CRM to support political education work

"In the service of democracy, peace and development", the Hanns Seidel Foundation (HSF) has promoted political education since 1967. The foundation with Christian social ideas organizes seminars and conferences, supports students in their development, advises decision makers on political topics and focuses on strengthening the international dialog. With CAS genesisWorld, the HSF wants to get ready to organize their foundational work in a digitalized world. "Throughout a year, we organize thousands of events, produce own publications and manage scholarships", explains Dr. Maximilian Rückert. He is responsible for the digitalization, artificial intelligence and health management topics and, in his role as CRM Officer, manages the strategic and operational implementation of the new software. The employees at the HSF headquarters in Munich already worked with event software in the past. But they not only faced challenges when organizing the large number of tasks, for example when maintaining address data, but the software could not be flexibly adjusted and did not meet the CRM requirements of the foundation. "We worked with an event management program, but what we really needed was a CRM software", confirms Rückert.

A tool for digital transformation

» With CAS genesisWorld, we laid the foundation for our digital transformation. «
Dr. Maximilian Rückert,
Head of Unit Digitalization, Artificial Intelligence and CRM Officer

The HSF published a call for tenders for the implementation of a CRM system in 2017. The aim was to better connect the various processes and manage them more efficiently. The

Industry
Foundations

Objectives/Requirements
- Implementation of a professional, digital customer management that rethinks citizens as customers
- Professionalize Marketing and Sales and strengthen the customer orientation, i.e. the dialog with the citizens
- Replacement of the previous event software which was too static and not intended for CRM requirements
- Efficient support when managing events, creating and managing publications and taking care of scholarship students
- Integration of already existing software

Benefits and advantages
- More time to take care of citizens' needs thanks to the automated digitalization of administration tasks via a central platform including the integration of third-party software
- Event management smoothly under control with just a few clicks from invitations to participant lists or hotel bookings. The interfaces to the website enable you to publish events including program flyers or to directly transfer data from the online registration form to the CRM system and on to the hotel management software.
- Precisely tailored and sustainable target group management thanks to intelligent filter functions for e.g. invitations or follow-up actions

contract for the tender was awarded to itdesign GmbH with CAS genesisWorld. "With this CRM solution, we can establish professional marketing and sales processes, and strengthen our customer orientation, that is our dialog with our citizens", explains Rückert. These topics had not

previously been a priority at the foundation as a public institution. "The 'Digital Avantgarde' group among our employees rethinks the citizens as our customers." As CRM team, these colleagues formed a cross-departmental support network for the change process and helped by describing their requirements for the new CRM solution.

Keeping an overview of all areas

Thanks to the CRM solution, the foundation team can now handle different event formats, manage its scholarships and deliver the publications on one single platform. This platform is linked to other systems as central core piece and integrates all data and working steps. "In CAS genesisWorld, we can now, for example, organize all working steps involved in a publication: starting with the concept and the production through to the ISBN number assignment and the linking of the end product to our Star Libraries library program", explains Rückert. To support the administration of scholarships, the CRM system provides a quick overview of the scholarship holder's master data at any time: How much is the grant? When are the payments due? Which subject and in which semester do they study? In addition, the Foundation's address database, which ranges from scholarship recipients and event participants to speakers and political contacts, is now maintained centrally. Functions such as the automatic duplicate check help to secure high data quality. Furthermore, the CRM solution supports employees in addressing contact persons at the right time and in their right role, as one contact person usually holds multiple roles at HSS.

CAS genesisWorld

Project data
- CAS genesisWorld Platinum Suite
- Interfaces: Star Libraries library program, Hotel management software, ERP system Wilken Entire

Customer
- Hanns-Seidel-Stiftung e.V., www.hss.de
- The foundation with Christian social ideas organizes seminars and conferences, supports students in their development, advises decision makers on political topics and focuses on strengthening the international dialog.
- Founded: 1967
- More than 280 employees worldwide

Project partner
- itdesign GmbH, Tübingen, www.itdesign.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
- Being used successfully by more than 30,000 companies

Organizing events from A to Z

"Especially our event organization becomes significantly easier with CAS genesisWorld", emphasizes Maximilian Rückert. The solution enables us to manage target groups and to fully control the planning, promotion, hosting, billing and evaluation of an event. "I can create a virtual event dossier, for example, of an expert group and select a suitable speaker from the linked database", describes Rückert a usage scenario. With the address directory, participants can be clustered by specific attributes so that, for example, local politicians can be informed about a workshop matching their target group interests. Invitations to these targeted distribution lists are then sent via the integrated e-mail campaign program. With just one click in the CRM system, the event including the program flyer is published on the www.hss.de/en website via an interface connection. Registrations which were made on a form on the website are on the other hand imported into the system and stored in the event dossier. From this, CAS genesisWorld generates participant lists, optionally with detailed information for food preferences or overnight accommodation requests in a foundation-owned educational centre. "I then book the bed via an interface to our hotel management software." The responsible employees also write and manage the speakers' fee contracts in the CRM, right through to billing and bank transfer via the interface to the Wilken Entire ERP system. After the event, CAS genesisWorld makes it easy to stay in contact with the participants. For example, by sending them further information via an e-mail campaign to inform them about a new publication containing a specific topic of interest.

The Banz Monastery Educational Centre offers seminar rooms with state-of-the-art conference technology. Furthermore, a rhetoric studio and media center with radio and television studio are also available.

"We want to define our target groups even more detailed to be able to contact them individually", says Maximilian Rückert. With its many features to build best customer relationships, CAS genesisWorld optimally supports the foundation team in implementing their plans.

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

Find out more

CAS CRM
A SmartCompany of CAS Software AG

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