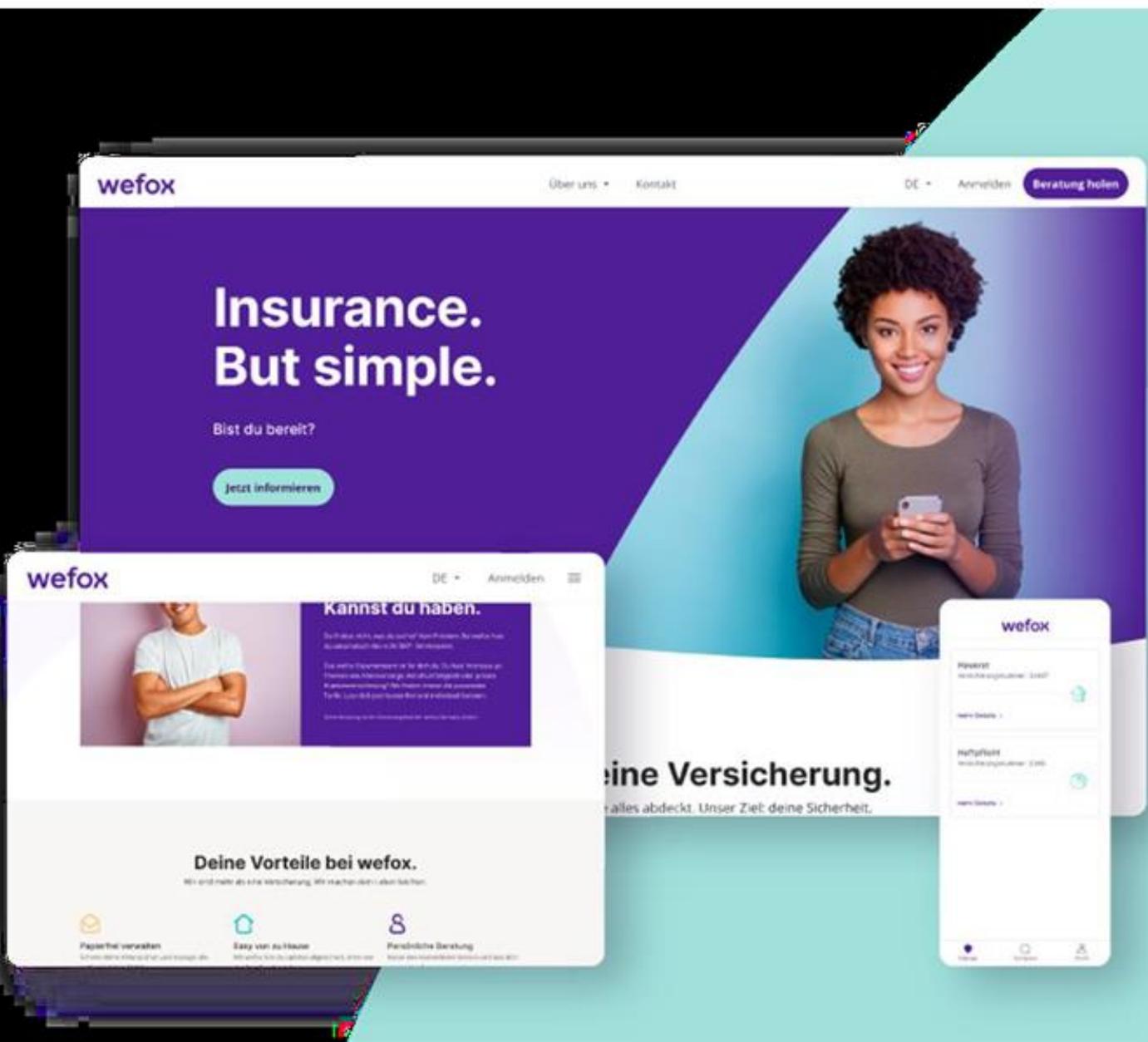


Reference

wefox



CAS genesisWorld

CRM + AIA® for small and medium-sized companies





» CAS genesisWorld was customized to meet our individual requirements and as a result is the optimal CRM solution for managing our processes. «

Matthias Gamper Development and Operations – Project initiator

wefox

Industry sector

Insurance brokers

Requirements

- Quick and easy capture of contact details
- A clear, well-structured dossier for each prospect
- Comprehensive filter options
- The sales process and each of the individual phases can modelled easily
- We can create cooperation agreements from within the CRM
- Display potential sales opportunities, Contact reports
- Event management with online registration, confirmation of registration and check-in management

Benefits and Advantages

- More time for customer requirements thanks to the address assistant, which quickly records new contacts
- Quick reaction times thanks to central access to all the relevant customer- and prospect data
- Potential turnover opportunities can be efficiently exploited thanks to the consistent digital modelling of each of the sales phases, from the first contact to the closing decision
- Individual overviews including their own lists/apps, for example, for opportunities
- Consistent and professional communications with templates such as for cooperation agreements, membership authorization and so on

CAS genesisWorld

Project data

- CAS genesisWorld Premium
- CAS modules: Form & Database Designer, Easy Invoice, Event Management, Report
- Microsoft SQL Server Standard Edition CAL Runtime

Customer

- wefox Austria GmbH, www.wefox.at
- Wefox is a service platform which functions as a hub between the customer, insurance agents and insurance companies
- Established in 2023
- 33 employees

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

Contact and Consulting



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