

Success Story

**dietzel**  
HYDRAULIK



**CAS**  **genesisWorld**

CRM + AIA® for small and  
medium-sized enterprises



# Customer focus

## made easy

With CAS genesisWorld, Dietzel Hydraulik puts particular emphasis on customer needs. For the hydraulic line specialist, the CRM solution combines key aspects: ERP data and DMS documents as well as client information and workflows. Nothing is lost, and the entire sales team can always be on top of things.

Dietzel are a leading system supplier for hydraulic line technology. The medium-sized enterprise employs more than 500 employees at their Beerwalde headquarters in the German Thuringia region, as well as in Xanten and Linz in Austria. For around 50 years, Dietzel have represented customized solutions "Made in Germany", and nowadays specialize in hose lines, special solutions, and technically sophisticated line systems. Modern machinery and effective production standards permit seamless manufacturing processes from single pieces to large series. Their customer base includes well-known manufacturers in the construction and agricultural machinery industries, producers of mobile cranes, industrial trucks, machine tools, injection molding machines, and manufacturers of wind turbines.

### Sales vision became reality

"We were looking for the ideal digital solution to implement our vision of smooth customer support while integrating our existing ERP data," explains Sören Geiger, Deputy Sales Director at Dietzel Hydraulik. With CAS genesisWorld, the CAS partner company aptus IT GmbH implemented a customized CRM solution for Dietzel, seamlessly integrating it into their existing IT infrastructure. The interfaces for bi-directional and automated synchronization with our ERP system Infor COM and the document archive d.velop.



### Industry

Manufacturing companies hydraulic line technology

### Objectives/Requirements

- Provide a digital solution to support the sales vision of smooth-running customer support
- Ensure seamless integration into the existing IT environment – connection of ERP, DMS, accounting, and quality management systems

### Benefits and advantages

- Ensures a 360-degree view of all information, from customer, prospect, and project data to sales opportunities and the expertise of individual colleagues
- Maximizes focus on tasks with a personalized, job-specific CRM dashboard, no time wasted searching for information
- Guarantees smooth project management during substitution periods thanks to the consolidation of all essential data from the ERP system, documents from the DMS, as well as customer information and workflows on a single platform
- Increases independence in process optimization: many configurations and workflows can be adjusted and created autonomously and in real time, without the need for IT support
- Structures the approval system precisely: sales managers automatically receive a notification when their approval click is required

documents are standardized with aptus's aConnect. We also easily integrated our financial accounting, quality management system, and MS Outlook's Exchange."



The entire sales team now has a 360-degree view of all information through their CRM dashboard, from customer, prospect, and project data to sales potentials and the expertise of individual colleagues. Thanks to the ERP and DMS system integration, all company data, receipts, and documents are always on hand. "During substitution periods, customer and project support continue seamlessly," Geiger says.

### Custom workflows

One of CAS genesisWorld's key advantages is the increased independence of the sales staff. With CAS genesisWorld, we can handle many configurations and processes independently and in real time, without resorting to IT support. The simple processes save a lot of time: I can make an adjustment this afternoon, test it tomorrow, and start a new workflow the day after. Not everything needs to turn into a huge project," Geiger says enthusiastically. One example of such custom workflows are triggers that automatically send e-mails with the necessary information after customer appointments. Even internal coordination has been digitalized and made more efficient. Another advantage is a precisely structured approval system: sales managers automatically receive a notification when their approval is needed. Additionally, sales staff working at the office or in the field can focus on their specific tasks without needing an

## CAS genesisWorld

### Project data

- CAS genesisWorld Platinum Suite
- Integration Infor COM and d.velop documents

### Customer

- Dietzel Hydraulik GmbH, [www.dietzel-hydraulik.de](http://www.dietzel-hydraulik.de)
- Leading system suppliers of hydraulic line technology
- Established in 1972
- Over 500 employees across locations in Germany and Austria

### Project partner

- aptus IT GmbH, [www.aptus.de](http://www.aptus.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
- 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



» Introducing CAS genesisWorld has raised our relationship management at Dietzel Hydraulik to a whole new level. Everyone on the team can find all the information in one place and align their activities consistently with customer needs. «

Sören Geiger, Deputy Sales Director at Dietzel Hydraulik

overview of the entire date landscape," Geiger explains. "This might involve tracking orders according to certain criteria, such as deadlines. Every morning, in the respective element of my personalized CRM dashboard I can see exactly which offers I need to follow up on that day. Everyone can focus on their work without wasting valuable time searching for information. It's highly effective and also just fun to do."

#### Future-oriented relationship management

Dietzel Hydraulik plan to further leverage CAS genesisWorld's potential in the future. "We plan to increase our focus on mobile applications, so that field staff can record visit reports on-site and coordinate more smoothly with the back-office team," says Geiger. Introducing CAS genesisWorld has raised our relationship management to a whole new level. Everyone on the team can find all the information they need in one place and align their activities consistently with customer needs."



More testimonials:

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

Find out more



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