

Success Story



EBNER
STOLZ



CAS **genesisWorld**

xRM and CRM for small and medium-sized companies



More room in the briefcase

In order to support its clients better, Ebner Stolz Mönning Bachern, the Stuttgart-based auditing and tax advisory firm, relies on modern client and data management. Since September 2007, CAS genesisWorld has formed the heart of client support and bundles all information in one system. This creates not only space in the briefcase, but also extends the flexibility of the staff enormously.

For more than 30 years, Dr. Ebner, Dr. Stolz & Partner has been advising medium-sized companies with respect to taxation, auditing and legal questions. As an independent consultancy, the office is amongst the larger, established firms in the branch. A well attuned team of generalists and specialists reviews and advises from a single source – whereby the client is at the centre of attention. Because auditors as well as tax advisors and lawyers work together in the company, it was difficult in the past to depict the particular business processes in one system.

CAS genesisWorld successful in competition

On behalf of the firm, the Fraunhofer Institute for Labour and Organisation in Stuttgart prepared a requirement catalogue which defined what a new system should perform given all the circumstances. CAS genesisWorld came through successfully in competition against products from other providers, e.g. SuperOffice. The fact that all necessary data are merged centrally and then accessible decentrally from every individual workplace spoke in favour of the software from CAS. "As our employees travel very often, the software must also function perfectly when accessed out of the office", according to Daniel Gleichauf, System Administrator and CRM Project Manager at Ebner Stolz Mönning Bachern. CAS genesisWorld is the central system for this task. "It was a challenge to fulfill the client's demanding requests through the ideal solution", according



Industry

Tax advisors and auditors

Objectives/requirements

- Modern client and data management
- Bundling of all information in one central system – also across branch offices
- Access to all data at every workplace as well as mobile when travelling
- Organisation of events and administration of participants
- Smooth interplay of different systems

Benefits and advantages

- All Uniform address data at central location
- Better data quality with less effort required for updating
- Complete client file with all, already-issued and completed orders
- Cross-branch office calendar simplifies scheduling
- Standardised, cross-system working interface
- Support during correspondence; uniform appearance by using templates

to Johannes Koppenhofer from itdesign GmbH, the CAS partner in Tübingen, about the acceptance and following implementation. itdesign set up the necessary connections between the various systems and adapted the standard CRM solution for medium-sized companies to the special needs of auditors, tax advisors and lawyers, especially in the address area: audit obligation, legal form, spouse, client number and name, consolidation are all available in the client's file.



Smooth interplay of all systems

All required information flows into the central CAS genesisWorld client system through interfaces. 20,000 registered client contacts, mainly company addresses, can be called up from the "DATEV Eigenorganisation comfort" office organisation system. All appointments and contacts from Microsoft Exchange and Outlook are integrated in the new database and complete the source data. The CRM software offers the possibility of archiving incoming and outgoing e-mails as well as important documents on the file system. The biggest advantage of the solution is that the user does not notice anything about the interplay between the various systems: the client structure is identical for all systems and created automatically. For example, if an address is changed, it is automatically updated in all systems through the interfaces.

Clarity creates new possibilities

The advantages of standardised addresses for all areas of the company lie in one hand: joint data updating at one central location improves the quality of the data, whereby the updating effort is significantly reduced at the same time. The employees gain an overview of all completed and ongoing activities. Already awarded and completed orders are filed transparently in one file and clearly presented in the form of specific client groups. CAS genesisWorld is used as a convenient overlapping working interface for addresses, telephone numbers, appointments, event and campaign management – from the desk or when out of the office. The client management system also provides the user with support for correspondence: contact data does not have to be entered manually, but is rather inserted automatically into the particular Word document. This facilitates the creation of circular letters and mailings on the one hand and, on the other hand, e-mail templates with attachments can be saved in the system.

CAS genesisWorld

Projectdata

- In use since 2007
- CAS genesisWorld at 800 workplaces
- Interface to "DATEV Eigenorganisation comfort"

Customer

- Ebner Stolz, Mönning Bachern, Stuttgart www.ebnerstolz.de
- Founded more than 30 years ago
- More than 1000 employees, 15 workplaces
- One of the large, independent, medium-sized auditing and tax advisory firms
- Advise and audit demanding, primarily medium-sized, companies "from a single source"

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
- 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 20.000 companies

In this way, electronic mail always has the same image to the client. Where order administration is concerned, the employees can view the budget, costs and turnover of a current project in the system as needed. "As soon as a colleague senses a saving in time, he immediately recognizes the advantage of the program", according to Gleichauf. "In addition, there is the high level of user friendliness: the basic functions of our CRM system are self-explanatory; when one has understood the basic principle of the link, then one automatically understands the entire system", the Project Manager is convinced.



Not the least because the employees briefcases are also a little bit lighter.

Team-oriented und efficient

So far, 800 employees in Stuttgart, Reutlingen, Leipzig, Hannover and Munich have been working with the new solution – and they are extremely satisfied. The launch in Berlin and Frankfurt will take place within this year.

"If one wants to replace an old system with a new one, it must be at least as good as the old one.



» The introduction has really paid off. The new working procedure is more efficient, more transparent and more intelligent. «

Daniel Gleichauf, CRM-Project Manager

On the road with the digital client file

If employees from Ebner Stolz Mönning Bachern are out of the office at their clients, they are supported by the mobile office with CAS genesisWorld: the data can either be harmonized on a mobile terminal device or viewed online via the Internet using the Webclient online. Every employee has thus the opportunity to access and process his personal and company-wide data at any location. Addresses, tasks and appointments can be changed outside the office at the push of a button. By using the web-based Intranet module teamWorks, which is used in addition, employees from other branch offices can also view their colleagues' appointment calendars online.



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www.cas-crm.com/our-customers

Find out more



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