

Success Story

  
**PANTAENIUS**  
VERSICHERUNGSMAKLER

**CAS** genesisWorld

CRM + AIA® for small and  
medium-sized enterprises



# Best insurance: trusting relationships

Pantaenius Versicherungsmakler GmbH, a leading insurance broker for mid-sized businesses, understands the priorities of its clients: professional advice that inspires complete confidence. To better cater to the individual wants and needs of clients, the progressive northern German business employs the CAS genesisWorld CRM solution as its central organizational platform.

## Web client and SME spirit

“From a technical perspective, the web client’s intuitive user interface was a crucial criterion, in addition to the necessary functions”, explains Jens Nehlsen, Technical Project Manager for CRM at Pantaenius Versicherungsmakler GmbH. As the solution can be accessed entirely through the web without requiring a fixed installation for each workstation, the rollout process is significantly simplified. Besides the technical specifications, another crucial factor played a role in the selection:



» We were looking for a provider who shares our SME spirit and speaks our language – and CAS Software fits the bill perfectly. «

Sebastian Papke, Team Leader IT Projects and CRM Project Manager

## Pilot teams ensure project success

To promptly demonstrate the benefits of CAS genesisWorld to individual employees, the company adopted agile project management techniques during its introduction and rollout. Pilot departments or individuals tested the functions to optimally customize the CRM solution according to their unique requirements. This way, employees have the chance to actively participate in the development process.



## Industry

Insurances

## Objectives/Requirements

- Organization of sales: Prepare data of both current clients and prospects systematically and consistently
- Structure project management, optimize processes
- Enhance the process of acquiring new clients
- Identify and optimize sales opportunities
- Automate resubmissions and facilitate client recovery

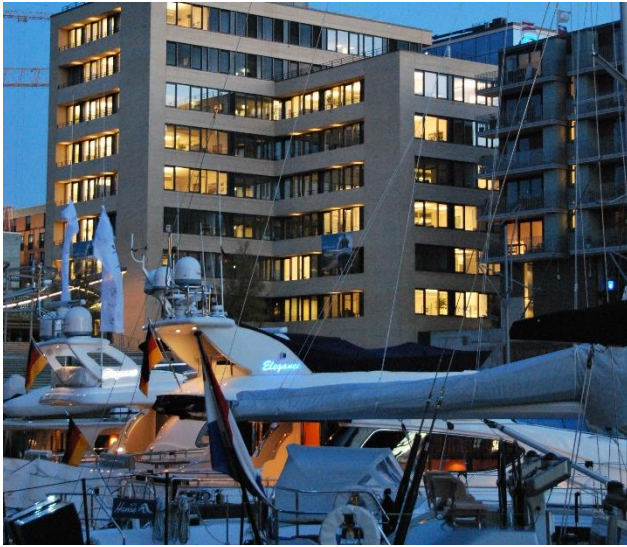
## Benefits and advantages

- Improved transparency and optimization of internal collaboration: simplified project work through shared filing structures and personalized views
- Efficiency: automated reminder function enables resubmission, etc.
- Increase in revenue: through optimized sales management and improved controlling
- Faster information and better advice: thanks to a 360-degree view of the client
- Organized cooperation: more structured meetings with insurers and cooperation partners
- Optimization of external processes: mapping of all communication channels, structured representation of meetings

## Much more than a conventional CRM

Since then, we have been using CAS genesisWorld in a number of areas, including sales management, event and project management, as well as controlling. In the future, the CRM will remain the central hub for all client-centric processes at Pantaenius, both strategically and





operationally. Being much more than a conventional CRM, CAS genesisWorld provides employees with a 360-degree view of all client and prospect relationships. What contracts are already in place? What is the scale of the damage? What was discussed last and with whom? All of these questions can be answered at a glance thanks to the CRM. All information, including correspondence, e-mails, and soon also phone calls, are linked in virtual customer dossiers. Moreover, with the integration of OASIS and D3, all documents are available at a central point within the CRM. This leads to significant time savings and a noticeable increase in efficiency.

### Special functions for the insurance industry

Thanks to the flexibility of CAS genesisWorld, functions and data sets, such as sales opportunities, could be adapted to the insurance industry's general processes. By doing so, the sales team utilizes sales opportunities to pro-actively engage in client discussions and provide expert information whenever necessary to address any queries. The system automatically calculates premiums and brokerage rates in the background and presents them in a graphical display in the dashboard. This provides comprehensive transparency for the entire team, even when the supervising colleague is on vacation or unavailable at the time. A very special success: the client win-back rate has already seen a significant increase thanks to the new process.

## CAS genesisWorld

### Project data

- CAS genesisWorld Platinum Suite
- Interface to OASIS and DMS D3

### Customer

- Pantaenius Versicherungsmakler GmbH, [www.pantaenius.eu](http://www.pantaenius.eu)
- Mid-sized insurance broker, mainly clients in the B2B sector
- Headquartered in Hamburg, founded in 1899
- Further locations in Düsseldorf, Munich, Kiel and Eisenach
- 140 employees

### 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
- CAS products being used successfully by more than 30,000 companies worldwide

### Budgets can be planned more effectively

The CRM solution simplifies budget planning significantly. Terminated and new contracts are clearly displayed in the CRM. Each employee is thus provided with a more precise estimation of the required budget for the following year. Pantaenius also utilizes its accumulated knowledge when cooperating with insurers. "In the past, annual reviews used to be recorded in an unstructured way, but now there is a separate data set for this", Nehlsen reports. The management can access all essential information for preparing and following up on meetings at the touch of a button.

## Digital workflow in the project management

CAS genesisWorld centralizes all project files and allows for direct task assignment, thus streamlining project management processes. During meetings, participants no longer rely on analog Kanban boards, as the current status of the project is displayed in CAS genesisWorld.



» We still have meetings – as we place great emphasis on team spirit. In the meetings, however, we now use the CRM solution as a clear platform. «

Jens Nehlsen, Technical Project Manager for CRM

## Dashboards ensure a clear overview

All in all, the new transparency has also been well received by the management: "In the central dashboard, I can see the current order volume at a glance. Which sales representative is currently in contact with which client? How many clients are in each stage of our sales funnel? The answer can be found in the CRM!" says Daniel Baum, owner of Pantaenius Versicherungsmakler GmbH.



More testimonials:  
[www.cas-crm.com/references](http://www.cas-crm.com/references)

Find out more



» CAS genesisWorld simplifies sales management and controlling. This newly created transparency helps us to expand our long-term client base. «

Daniel Baum, owner of Pantaenius Versicherungsmakler GmbH

## A true flagship project

The varied application of CAS genesisWorld at Pantaenius has developed into a true flagship project. And the use of CAS genesisWorld continues to grow. The next step will be to optimize event management, for example, by sending invitations digitally and making them more interactive. Newsletters as well as questionnaires for clients will then also be sent directly in combination with Inxmail.

Last, but not least, Jens Nehlsen praises the collaboration with CAS Software. "We value the professional and amiable partnership, and we have a designated point of contact who addresses all of our needs – this reliable communication is our best insurance", says Jens Nehlsen.

Contact us now for more information on applying CRM + AIA®.

Phone: +49 721 9638-188

E-Mail: [CASgenesisWorld@cas.de](mailto:CASgenesisWorld@cas.de)

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



CAS Software AG  
CAS-Weg 1 - 5  
76131 Karlsruhe

