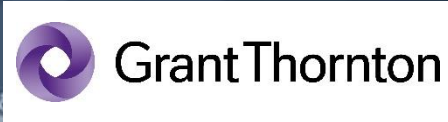




Reference



AUDIT

CAS genesisWorld

CRM + AIA® for small and medium-sized companies





» itdesign has adapted CAS genesisWorld to our needs in such a way that we now have a solution with which we can implement and further expand the goals of our client management concept. «

Michael Verhasselt, Head of Clients & Markets



Sector/industry

Auditing company

Objectives/requirements

- Provide support for the central client management concept
- Increase client satisfaction, retention and expansion of key accounts
- Ensure the growth and increase of order density through systematic market cultivation
- Contact-related task and history management
- Mapping of opportunities, offers and orders
- Networked and transparent working

Benefits and advantages

- Complete 360° view of existing and potential clients with all relevant contact information including correspondence, phone calls, appointments as well as contracts and documents, even on the move
- Multi-level rights system secures confidential data - with access only for authorized employees
- Better internal and external communication, supported by automated workflows
- Simple collection and maintenance of the central data, no double data storage
- Systemically supported qualification process provides a sound basis for decision-making



Project data

- CAS genesisWorld Premium (rental model)
- Module: Form & Database Designer, Report, Survey, Event Management, Duplicate Finder pro
- Interface with DATEV Eigenorganisation Comfort

Customer

- Grant Thornton AG, [www.grantthornton.de](http://www.grantthornton.de)
- Internationally operating, partnership-managed auditing company
- Founded 1958
- 850 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
- secure data due to sophisticated multi-level rights system
- Established product – winner of several awards
- CAS products being used successfully by more than 30,000 companies worldwide

Contact and Consulting

**itdesign**

itdesign GmbH  
72072 Tübingen  
+49 7071 3667-60  
[www.itdesign.de](http://www.itdesign.de)



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