

Success Story



CAS ^{globe icon} genesisWorld

CRM + AIA® for small and medium-sized enterprises



Strong network in mechanical/plant engineering

What sets QESAR apart is its systematic and goal-oriented communication which is also honest and appreciative. The service providers are empathic with a lot of expertise, they form the vital link between the mechanical engineers and the suppliers. Managing many levels of communication and enabling a constant exchange of experience between all parties in the network is QESAR's strength. Deploying the CRM solution, CAS genesisWorld has simplified relationship management for employees at QESAR.

QESAR is an industrial cooperation in the field of mechanical and plant engineering that acts as a service provider between its companies, service providers/suppliers, expert groups, research institutions, colleges and universities. For QESAR, cooperation means sharing experience, expertise and knowledge about current projects in the network on an equal footing, while at the same time keeping an eye on the entrepreneurial benefits. To manage the many contacts in an even more targeted and rapid manner and to provide all employees with an overview of all projects, QESAR introduced the CRM solution CAS genesisWorld.

The 360° view is enormously important

Before the CRM solution was introduced, contact and project data was stored in various applications, such as Outlook and Excel. Communications between the project manager and the customer were direct, with no access for third parties. Tasks and projects were stored individually. Today, employees can quickly find all customer information using the search function in CAS genesisWorld, which saves them a lot of time and effort while allowing them more time to exchange information with their partners. Long-term, trusting collaboration with cooperation partners requires communication on many levels. With



Industry

Engineering

Objectives/Requirements

- Easy and rapid access to contacts and status reports
- Structured contact management: Separation of suppliers, engineering companies, individuals
- Central filing system
- Enable cross-functional collaboration
- Map training and event management
- Integrate contract management
- Controlling interface

Benefits and advantages

- 360-degree view, uniform, company-wide knowledge base for all cooperation partner contact and interaction data
- More time for partners thanks to the fast retrieval of personal, project and document data
- Intuitive usability of the web client also mobile
- Flexibility and adaptability – bit-by-bit, additional work areas such as event and contract management and controlling are being mapped and added
- Improved responsiveness to a wide range of inquiries thanks to a comprehensive information platform with intelligent search functions and individual views

CAS genesisWorld, address and contact data is kept up to date and processes are linked directly to individual mechanical engineers and suppliers. "This 360-degree view



was an important criterion for us when selecting the CRM solution", says Michael Hofmann, Project Manager at QESAR. "Particularly for external communication, CAS genesisWorld is an enormous relief, because as a service provider, our tasks are diverse, and in addition, new areas can always be added. By bundling all communication with our cooperation partners centrally in one software solution, we still maintain an overview of our interrelationships and processes at all times."



» The 360-degree view is an enormous relief for our diverse tasks and ever expanding new areas, it enables us to keep track of all connections and processes at all times. «

Michael Hofmann, Project Manager

Flexibly adaptable to special requirements

When selecting the CRM solution, flexibility was particularly important to QESAR. "In addition to a clean data structure, it should also be possible to integrate event management, contract management and controlling in the CRM. CAS genesisWorld is highly customizable, and our specific requirements were perfectly mapped here," says Hofmann. QESAR was supported during the implementation by CAS partner Hochwarth IT GmbH. In a series of workshops, they jointly developed the structure of the CRM solution. An important element in the implementation of a new software solution is to involve colleagues and take their wishes into account.

CAS genesisWorld

Project data

- CAS genesisWorld

Customer

- QESAR Industrielle Kooperation, www.qesar.de
- Service provider in engineering
- Network of world-leading special machinery and plant manufacturers and their recommended suppliers
- Employees 10
- Support of > 25 companies and > 165 service providers/suppliers
- Founded 2002

Project partner

- Hochwarth IT, www.hochwarth-it.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
- Being used successfully by more than 30,000 companies

At QESAR, these wishes are particularly diverse, since each employee comes from a different area of responsibility and thus has different requirements for the CRM solution. What they all had in common was the desire for a clear data structure. "The team from Hochwarth IT has always advised us very well. They directly understood what we do and what makes us tick. A strong partner was extremely helpful during implementation as we are not the classic customer for a CRM solution and had many special requirements," Hofmann recounts. QESAR now primarily uses the web client, the desktop client for customizations, and the app for mobile phone access.

Since all relevant data can be accessed quickly and easily in CAS genesisWorld, the CRM solution forms the perfect basis for QESAR. After all, being able to provide information and react quickly is a top priority for the service provider QESAR. Whether searching for a person, a project or a company, all information can be found in CAS genesisWorld at the touch of a button. "CAS genesisWorld's intuitive interface, keyword search and uniform data storage make it easier for us to



support our many cooperation partners. And the one-click creation of analyses and reports is another feature that saves us time in our daily work," says Hofmann.

Map other workspaces

A web connection for event management in CAS genesisWorld is QESAR's current project. In the future, it will be possible to create and edit events in CAS genesisWorld and to display them in an internal area on the website so that participants can register directly online. In addition, controlling and contract management content are to be integrated into the CRM solution in order to map and evaluate even more data. Almost all the work areas of QESAR employees will then be bundled in CAS genesisWorld.



More testimonials:
www.cas-crm.com/references

Find out more



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