



# CAS Engineering

CRM for the engineering sector

# Impress your customers with effective project management and top service

Engineers who handle their projects efficiently and delight their customers are the key to long-term company success. The factors of success are often defined as excellent project management, outstanding customer care and top service. And the most efficient way of achieving these key success factors is often by using a CRM solution adapted to these requirements, so that it effectively supports staff working in the areas of both customer care and project management. A CRM solution helps your staff to constantly keep their eyes on the ball with respect to projects and contact partners. This saves time and money, and also allows you to focus on what matters most, customer excellence and best practice in your project management processes.



## Benefits of CAS Engineering

### Stay up-to-date with your customers

- Access current contact data whenever and wherever you want
- Comprehensive customer dossier displaying all information giving you a 360° view
- Mailing lists tailored exactly to your target groups for successful marketing campaigns
- Consistent use of sales opportunities and sales potential
- Efficient processing of service and support requests by the Helpdesk

### Interdepartmental and company-wide cooperation

- Easy coordination of appointments and efficient task management
- Uniform correspondence and centralized document storage/archiving
- All the important information at your fingertips
- Transparency in the areas of your personal contacts and current project status
- Close management of all participating project partners

### Plan, manage and calculate your projects efficiently

- Structured project planning and management
- Implementation of routine workflows
- Integrated reporting with project referencing and project status
- Project controlling with progress comparisons
- Complete project dossiers for seamless documentation
- Accurate service invoicing

### Reliable management planning

- Clear resource planning for optimal resource utilization
- Summaries of your engineers' competencies
- Performance indicators to aid employee utilization and project deployment
- Confident decision making with real time analysis
- An overview of all project processes

## The complete CRM solution for engineers

As a leading industrial solution provider, CAS Engineering embodies a complete CRM solution for engineers. It combines all of the important business processes that you would expect to find in an engineering bureau, but with added intelligent customer management and sales functions. Your employees will benefit from optimal support in the form of powerful project management features, and a central information database that stores data on each customer as well as on each project. The tried-and-tested functionality of our software is an invaluable aid in areas such as new acquisitions, consultation and project handling – the management team always has key information at their fingertips. CAS Engineering's foundation is CAS genesisWorld, the leading, multi-award winning CRM solution for small and medium-sized enterprises (SMEs).

## Keep your customers in focus at all times

With CAS Engineering you can always keep your customers firmly in view. Your employees always have the most important data to hand, whether for quickly gathering information on customer requirements, or for the efficient, economic realization of those wishes. It is all possible. And now mobile, too: the customer dossier provides you with a 360° view of all your customers' details which you can access from either your office, or while on the go. This information helps to support your decision making, and also simultaneously forms the basis of all your interactions and communications with customers, project stakeholders, colleagues and employees.



*"Underpinning the service and sales transparency in a single address and contacts database. This database contains information on product use, service matters and enquiries which means you can react, not just with speed, but also with confidence to customer enquiries. The benefits to service and sales in terms of creating transparency are huge, especially in areas such as indirect sales into international markets".*



Dr. Kolja Haberland, Chief Customer Officer (CCO) and Chief Technology Officer (CTO) of LayTec AG

## Professional project management makes for a happy workforce and satisfied customers

CAS Engineering gives you full control of all aspects of the project management process: from issuing quotes, through to appointments and resource planning, as well as efficient project handling, service invoicing and controlling. In addition, CAS Engineering helps you to capture enquiries efficiently and quickly, process them effectively and then systematically forward them to the right people. Improving structured processes within your company helps your employees to work more efficiently, enjoy being relieved of routine tasks and develop more motivation in their work. Consequently, customer trust in your services will increase and they will feel more comfortable working with you.

### What will CAS Engineering do for your company?

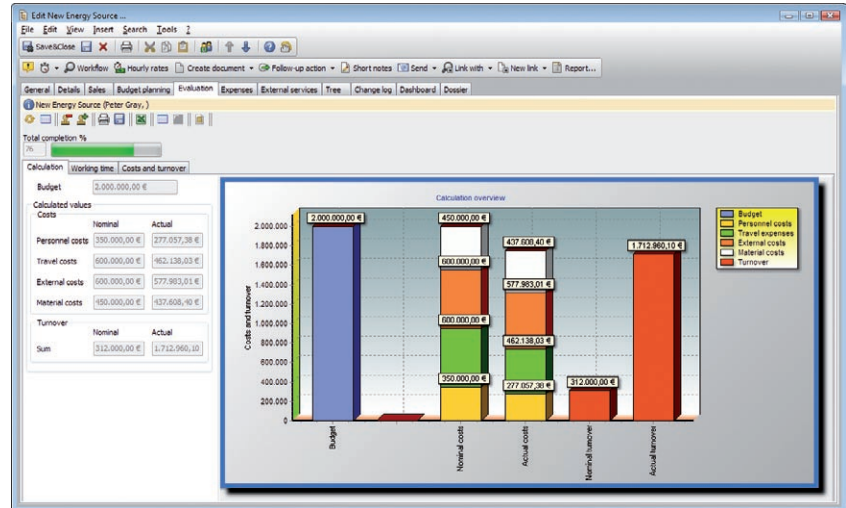
- Optimize projects by improving efficient planning and management
- Promote simple and time-saving processes
- Enable direct communication and seamless cooperation, both in and outside of the company
- Increase transparency through centralized information
- Help employees to become better informed and motivated
- Enable prompt, transparent service invoicing and clear project calculations
- Allow full control over all costs
- Structure your sales and make forecasting easy
- Provide effective, target-orientated marketing
- Enable you to enjoy long-term company success

**Find out more about CAS Engineering**  
Seamless project management and excellent customer focus →

# Seamless project management and **excellent customer focus**

## Target-orientated project management gives excellent results

With CAS Engineering, you can use purposeful and effective planning to manage your orders. As soon as CAS Engineering is deployed various project stages can be included, such as, phases, milestones, risks, targets, tasks and resources. There are some nice features that help you to keep your project on track, like project status and an integrated early-warning system. Completed projects can be analyzed with respect to their commercial viability. The results can be used to form a calculative baseline for future costs, so increasing the competitiveness of your future offers.



Viability comparisons help to keep projects on course and form a calculative baseline with which costs can be accurately assessed, so increasing the competitiveness of future offers.

## Effective resource planning for optimal utilization

You can use CAS Engineering to effortlessly organize your project team's resource planning. The planning view helps you to carefully assign tasks. The graphic view allows you to check employee utilization and avoid overlaps in your appointments or bottlenecks. In this way, you can effectively plan your resources, and optimally manage workload.

## Prompt project time calculations and cost control

CAS Engineering guarantees you the smart recording of times, expenses and external costs for projects and customers – monitoring your costs is not just restricted to the

office, now you can keep tracking everything even while mobile. Budget and material costs, remaining effort and hourly rate analyses are all included. Quick analyses keep you informed of the current status of your costs. Daily status reports feed into the project calculations at the touch of a button by means of ERP integration – quick and simple. You get a clear view of your project management, and prompt service invoicing.

## Get the big picture – with central and secure document storage

Regardless of whether your project teams are constantly changing, CAS Engineering uses a central document database which guarantees that all staff have consistent access to all documents as well as customer and project information. It is also worth noting that all your data is archived, whether project related or not, so that in the event of any customer queries or guarantee claims, you will have all the information you require at your fingertips. Access to your data is controlled by a comprehensive rights system that uses multi-layer confidentiality.

*“The flexibility of the software meant that it could be customized to fit a number of our company specific requirements. Matching our requirements with the software was made much easier by the excellent project support.”*



Andrea Strobel, Managing Director of Hydro-Elektrik GmbH

## Good teamwork makes more time for customers

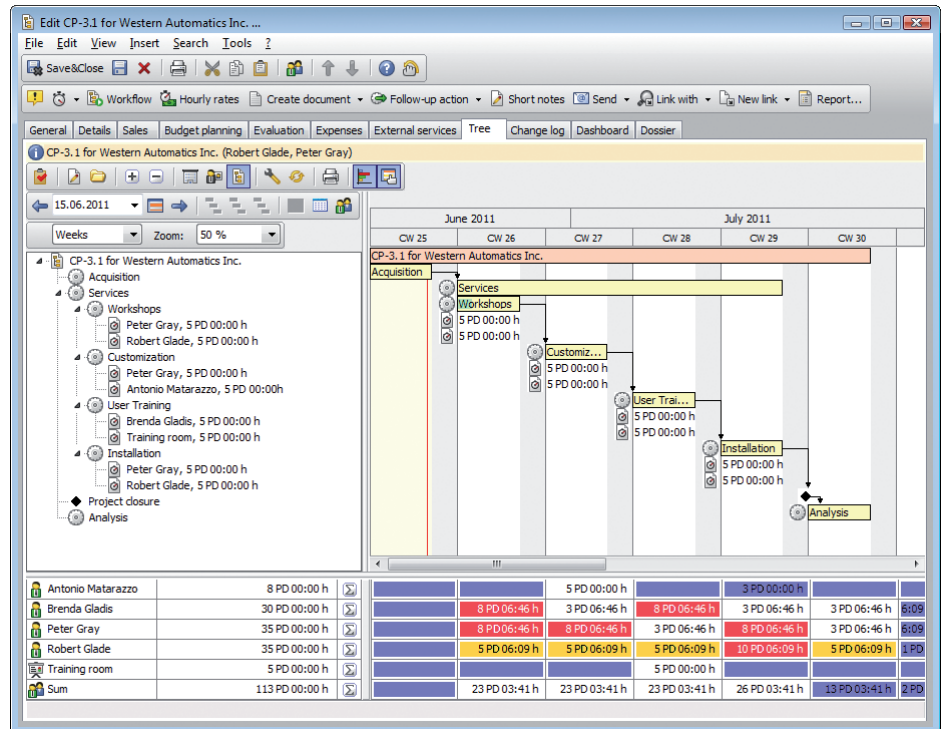
With CAS Engineering, all of your employees can access the centrally stored data. This transparency promotes interdepartmental and cross-company team work, even if your teams are constantly in flux. Typical activities, such as coordinating appointments, allocating tasks and shared project work are optimally supported: every employee has an overview of both project content and current project status – and this forms the basis of all future planning. CAS Engineering helps you to improve your consulting competency and lighten your daily workload, thus giving you more time for business critical activities, such as your customers and collaborative projects.

## Mobile access: up-to-date always and everywhere

It makes no difference where your employees are, nor what kind of device they are using: whether visiting a client, or working from home, whether they are using a mobile phone, smartphone or notebook on the move, or even if your company has a number of different locations. CAS Engineering always gives you direct access to the latest information by means of data synchronization and the Internet. It is not just about mobile access either, you can also continue working on and editing your documents when mobile. Mobile CRM is now available for all the major smartphones and tablet PCs.

## Keep up to speed with your customers

The key to successful customer communication is always keeping your contact data right up-to-date. CAS Engineering automates the administration of contact data with the help of some useful functions. In addition, the customer dossier contains all the individual contact information. A quick look in this view is all it takes for your employees to catch up with what your customers are doing: for example, employees can see what your customers are busy with, where it is taking place and who is responsible for it. Appointments, tasks, phone calls, notes, correspondence, opportunities and invoices are all displayed in a structured and chronological format. To top it all off, individual access rights guarantee confidential cooperation, as well as data protection.



Purposeful and effective planning of consultancy projects with the help of project plans.

## CAS Engineering – the tailor-made, flexible complete solution

It does not matter how big your company is: CAS Engineering has been designed to fit your organisation like a glove from the word go. Best of all, it can be expanded at any time to cater for more users, or new modules. Whether for an individual member of staff, or for the whole team – with this level of flexibility you will always have the solution that best fits your needs.

### CAS Engineering

- fits companies of any size.
- is a flexible, complete solution that can be immediately deployed.
- runs a single user interface that can integrate additional applications.
- conforms to the highest data security requirements.

## Never stop impressing your customers

Top service and secure management planning →

# Top service and secure management planning

## Quick and competent service

In addition to the comprehensive features that CAS Engineering offers you, you also have the ability to access detailed customer information, such as service contracts and product use. Your service employees have immediate access to specific information such as special agreements including service levels, reaction times and preferred contacts. This gives them a snapshot of exactly what is going on. Information flowing back from customers, such as enquiries can be efficiently captured and processed, or systematically forwarded to a relevant person. The integrated contract management functionality precisely communicates the types, extent and prices of all your services.

## Helpdesk maximizes efficiency

Organizing service requests is easy and transparent: a trouble ticket system records errors, controls transfers and responsibilities, informs project management, and allows customers to track their request via the Internet. Key service parameters, such as process duration and resources used are recorded by the program and this guarantees complete cost management. Additionally, CAS Engineering can also help you with analyses of areas or individual customers, and all at the touch of a button. All-in-all, CAS Engineering is a great package that provides you with a complete professional solution.

## Aim for transparency in actions and decisions

CAS Engineering summarizes all the important interdepartmental and company-wide information into clear dashboards. A well engineered, multi-step rights system makes sure that only the members of staff with the corresponding rights are given access to the respective information. Daily analyses of customer creditworthiness, efficiency, and turnover forecasts form the basis of all management decisions. Clear forecasts and automatic reporting provide a reliable management overview, and keep your company well on course to success.

Customer	
Company:	NOMOSYS
Company 2:	The Consulting Company
Contact person:	Mr Robert Smith
Street:	712 Tottenham Court Road
Postal code:	W1T 7PT
Location:	London
Type:	Customer
Status:	Service agreement
Person responsible:	Robert Glade
Sector:	Consulting
Phone (public):	+44 723 471 192121
E-mail (business):	robert.smith@nomosys.uk
Phone (business):	+44 20 7756-110
Homepage:	www.nomosys.uk

Contact data	
First contact:	Personal
First contact date:	24.12.2007
Last contacted on:	11.09.2011 14:00:00
Contact person:	Peter Gray
Last contacted via:	Document

Complaints	
Current tickets:	6
All tickets:	6
Average processing time:	-

Orders	
Current orders:	1
Turnover from current orders:	21.400,00 €
Orders in acquisition (total):	27.517,50 €
Orders in acquisition (weighted):	22.014,00 €

Unpaid items	
Number of unpaid receipts:	1
Total from unpaid receipts:	27.000,00 €

Utilized products	
Database software:	1
ERP software:	0

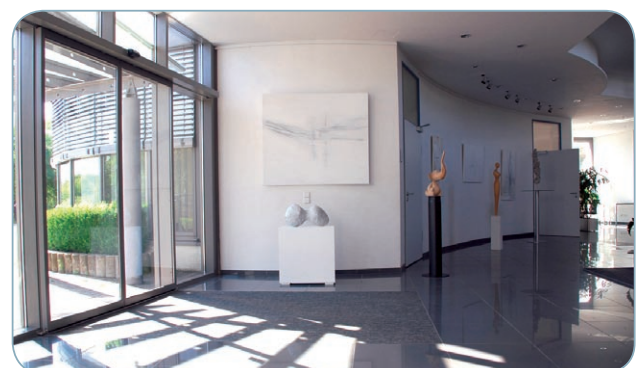
  

Contracts	
Service agreements:	1

Consultants have clear customer dashboards that communicate key-customer information at a glance.

## CAS CRM – the market leader with over 25 years of CRM experience

CAS Engineering is a product of CAS CRM, a SmartCompany of CAS Software AG based in Karlsruhe, Germany. Having over 200 certified partners the company is the leading German CRM provider to small and medium-sized enterprises (SMEs). Its product portfolio includes CRM systems and industry solutions which are used by companies, service providers and organizations to establish successful and sustainable customer relations, to help them make better use of their internal knowledge and improve corporate memory, as well as increase employee efficiency.



## Capitalize on sales potential and sales opportunities

Any successful company has to be able to recognize and make the most of an opportunity when it sees it. CAS Engineering helps you to keep your new customer acquisitions in constant focus, from the very first customer contact to the closing of a repeat deal. This is the cornerstone of long-term sales success. The automatic notifications and actions service promptly informs you of a variety of events, like customer birthdays, re-scheduled appointments, or escalations. In addition, CAS Engineering allows you to put together quotes and process enquiries quickly with no fuss. You can optimize the creation of service specifications for tendering, and manage versioning all from one application. As a result, the whole sales process becomes more transparent, more efficient and more successful.



## CAS Engineering offers your company the following:

- central, consistent customer management with current addresses and dossiers;
- comprehensive project management with integrated early warning systems, project structure planning and resource planning;
- workflows for pre-structured projects and for completion in specific phases;
- interdepartmental appointment and resource management;
- project controlling with standardized project reports and with cost tracking for time and expenses;
- management and invoicing of service and maintenance contracts;
- helpdesk with a built-in system for support request management;
- a knowledge database, FAQ and online support;
- mobile access – anytime, anywhere;
- a thorough sales process with sales methodology;
- targeted marketing campaigns with systematic customer dialogues;
- filter functions and global searches of all data;
- smart working and user friendly interfaces.

For more information click [www.cas-crm.com/cas-Engineering](http://www.cas-crm.com/cas-Engineering)



More than 200,000 users in 25 countries work with CAS Software AG products on a daily basis. The company has won a number of awards for both its innovative products, and its commitment to the SMEs. The awards include: “Innovator of the year” in 2011 and 2006, “Employer of the year” in 2009 and last, but by no means least, the “Software Made in Germany” quality seal of approval.





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

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