



One of the largest established firms in its field of business.

CAS genesisWorld

At a glance

Sector: Tax advisors and auditors

Background/Objectives:

- ▶ Modern client and data management
- ▶ Bundling of all information in one central system – also across branch offices
- ▶ Requirements of auditors, tax advisors and lawyers under one roof
- ▶ 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

Uses and benefits

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

Success story



More room in the briefcase

In order to support its clients better, Dr. Ebner, Dr. Stolz & Partner, 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 large, 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 Dr. Ebner, Dr. Stolz & Partner. CAS genesisWorld is the central system for this task. “It was a challenge to fulfil the client’s demanding requests through the ideal solution”, according to Johannes Koppenhöfer from itdesign GmbH, the CAS partner in Tübingen, about the acceptance and following implementation.



Lighter briefcase – with CAS genesisWorld as the heart of client support.

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. Approx. 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 Microsoft 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 in the Hyperwave IS/6 knowledge management system or 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.





„The new way of working is more efficient, more transparent and more intelligent than before.“

Daniel Gleichauf, System administrator and CRM Project Manager at Dr. Ebner, Dr. Stolz & Partner

Project data

- ▶ In use since 2007
- ▶ CAS genesisWorld at 250 workplaces
- ▶ Interface to "DATEV Eigenorganisation comfort"
- ▶ Interface to Hyperwave IS/6 knowledge management system
- ▶ Integration of Microsoft Exchange and Outlook

Customer

Dr. Ebner, Dr. Stolz & Partner, Stuttgart
www.ebnerstolz.de

- ▶ Auditing, tax and legal advisory, management consulting firm
- ▶ Founded more than 30 years ago
- ▶ More than 450 employees (including cooperation partners)
- ▶ 9 branches (Munich, Stuttgart, Reutlingen, Frankfurt, Berlin, Leipzig, Hanover, Hamburg and Kiel)
- ▶ One of the large, independent, medium-sized auditing and tax advisory firms
- ▶ Represented internationally through partner companies of SC
- ▶ International
- ▶ Advise and audit demanding, primarily medium-sized, companies "from a single source"

Implementing partner

itdesign GmbH, Tübingen
www.itdesign.de

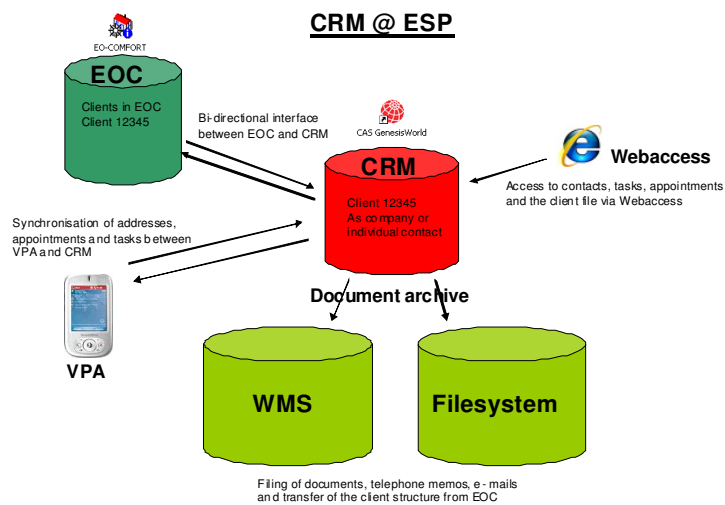
CAS genesisWorld

- ▶ Professional customer management
- ▶ Supports internal processes, raises efficiency
- ▶ Especially for the needs of SMEs
- ▶ Very good price-performance ratio
- ▶ Flexible, integrable, extendable
- ▶ Established product with several awards
- ▶ Over 110 CRM specialists provide on-site support
- ▶ More than 1,900 corporate customers

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. 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



Seamless flow of data into the central client system – the user does not notice the interplay of the systems.

Project Manager is convinced. In the future, even events will be organised using the CRM Groupware: by saving information on the addresses, the responsible person has a complete overview of the status of the contacts who have been invited.

On the road with the digital client file

If employees from Dr. Ebner, Dr. Stolz & Partner are out of the office at their clients, they are supported by the mobile office with CAS genesisWorld: the data can either be harmonised 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 CAS teamWorks Intranet solution, which is used in addition, employees from other branch offices can also view their colleagues' appointment calendars online.

Team-oriented and efficient – an impressive account

So far, 50 employees have been working with the new solution – and they are extremely satisfied. At the end of 2007, there will be 250. "If one wants to replace an old system with a new one, it must be at least as good as the old one. In our case, the introduction has really paid off. The new working procedure is more efficient, more transparent and more intelligent than before", says Gleichauf drawing a successful conclusion – not the least because the employees briefcases are also a little bit lighter. And through an overview of all activities in one client file, already issued and completed client orders are filed transparently – only in this way can flexible and integrated overall solutions be created successfully for clients.

saving in time, he immediately recognises 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