

Reference



KONTORA

STRATEGIEBERATUNG FÜR VERMÖGEN

» CAS genesisWorld is currently a key module in our corporate processes. «

Christian Piper, Strategic Consulting

CAS genesisWorld

xRM and CRM for small and medium-sized enterprises





» Thanks to CAS genesisWorld and our special adjustments, the CRM system is currently a key module in our corporate processes and helps us deliver a professional consultancy service to our clients. «

Christian Piper, Strategic Consulting



STRATEGIEBERATUNG FÜR VERMÖGEN

Industry

Consulting

Objectives / requirements

- Controlling for sales activities
- Mapping of previous data and project structures
- Entering working times for clients and projects
- Automatic notification of activities
- Audit compliance
- Authorization concept at object level
- Telephony integration
- Standardizing the work processes

Benefits and advantages

- Rapid access via client files to all relevant projects and histories
- Individual reports at the click of a mouse thanks to the integration of Crystal Reports
- Processes are significantly streamlined
- Invoices based on working hours are automatically created
- Pre-configured procedures are used, for example, to link minutes of meetings with tasks, thereby automating the distribution to employees and clients



Project data

- CAS genesisWorld Premium
- Modules: Form & Database Designer, Report Manager
- Integration of Crystal Reports

Customer

- Kontora Family Office GmbH
www.kontora.com
- Consulting for family assets
- 26 employees

Project partner

- gid GmbH, Norderstedt
www.gid-gmbh.de

CAS genesisWorld

- Professional customer management
- Supports internal processes, increases efficiency
- Specially tailored to the needs of SMEs
- Very good price-performance ratio
- Flexible, easy to integrate and to expand
- Established and multi-award-winning product
- Over 200 CRM specialists provide on-site support
- Successfully used by more than 10,300 companies

Contact and consulting



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CAS CRM

A SmartCompany of CAS Software AG

www.cas-crm.com