



Success story



Germany-wide sales controlling with KIS customer information system

At a glance

Sector

Manufacturing companies

Objectives/Requirements

- Problems in data administration
- Unorganized flow of information
- Unmanageable volumes of data
- Regional managers had no access to current figures
- Sales reports for regional managers laboriously produced by hand
- Address details and customer information kept in numerous unconnected systems
- Duplicate and triplicate editing resulting in inconsistencies and many errors

Advantages

- Regional managers/field sales staff are integrated into an efficient sales network
- Time and postage savings
- Simplified and optimized management of master data records
- All data available offline on field sales staff laptops
- Better management of business processes
- Essential user-friendly tool for management of everyday work
- More time to provide customers with advice and support: customers are now more satisfied

The phenomenon of "comfortable" control is an underlying principle of all life on Earth. We human beings, for example, have mechanisms to regulate our bodies: if we are too warm, we sweat to cool ourselves down; if we are too cold, we shiver to generate heat. The ecological heating system devised by energy and environmental technology company Paradigma Energie- und Umwelttechnik GmbH & Co. KG also employs this method: when rooms cool down, the boiler generates more heat and the speed of the heating circuit pump is increased. Paradigma's vision today is still the same as it was when the company was founded back in 1989: to maximize the reduction of pollution and to optimize the utilization of renewable energy, applying advanced technologies. For this purpose, Paradigma has devised the innovative MES control system and has also applied the principle of comfortable control to its CRM system, which was implemented company-wide in 2005.

Paradigma has its head office in Karlsbad-Langensteinbach near Karlsruhe, Germany, and is represented throughout Germany by a network of selected partner distributors, controlled by Paradigma's regional sales managers.

A major problem posed by the regionally based sales structure was the administration of data. Before the CAS genesisWorld CRM system was introduced, regional managers used to send details of new or changed addresses by e-mail, fax or handwritten note to the head office in Karlsbad. There the details were recorded, but not in a way accessible to the regional managers. Moreover, many contacts held in individual regional managers' own databases were not made available to others in the organization. A lack of integration with enterprise resource planning also hindered the flows of information, meaning that not all regional managers had access to current order and delivery data or invoices. From the head office, all this documentation was then laboriously sent out to the regional managers by hand, either by e-mail or in paper form. The decisive time and cost savings that a CRM system delivers is obvious just by looking at the enormous volumes of data involved: 15,000 customer orders, 2,500 sales team visit reports and 5,000 aftersales department service cases a year; 1,000 customer inquiries a month received over the Internet; and 800,000 accounts vouchers containing over 2,500,000 items created every year.

Kick starting the sales network

"We wanted to integrate our regional managers into an efficient sales network, which we achieved by implementing a CRM system. Our key aim was to simplify and optimize the management of master data records," reports Jörg Münchinger, sales support manager at Paradigma and project manager for KIS (the German abbreviation for "Customer Information System"). "It was clear we would make considerable savings on postage alone, let alone the savings made in terms of time – time that can now be spent providing more advice and support to our customers."

Paradigma had high demands of the CRM system it wanted. A project team incorporating all parties involved drew up a detailed target specification. This included bidirectional integration with the SAP enterprise resource planning system to ensure that current data is available at all times and from any location, and to allow field sales representatives offline access to data on their laptops – they can then enter contact data and then simply replicate this data to the head office system.

CAS genesisWorld



CAS Software AG
Wilhelm-Schickard-Str. 8-12
76131 Karlsruhe, Germany

Phone: ++49-(0)721/9638-188
Fax: ++49-(0)721/9638-299
E-Mail: CASgenesisWorld@cas.de
Web: www.cas-software.com

„Since we introduced CAS genesisWorld, business processes run much more efficiently and faster.“

Jörg Münchinger,
Sales Support Manager and
KIS Project Manager of Paradigma



Head office sets up new or modified contacts in enterprise resource planning as a debtor account based on an automated checking and validation process. The updated records are reimported into the CRM system and from there automatically transferred to the field sales laptops. Field sales reps are also provided with transaction data on products sold, as well as documentation such as quotes, orders, delivery notes and invoice copies. An access control system ensures that field sales territories are protected and everyone working on the CRM system only sees what they need and are authorized to see. This provides field sales staff with permanent offline access to all key data, enabling them to manage business processes more efficiently.

Rapid implementation

Once the requirements had been established, Paradigma surveyed the CRM market and, in 2005, opted for the CAS genesisWorld solution from the leading CRM specialist for small and midsize enterprises, CAS Software AG. To implement the system, Paradigma chose Cologne-based CAS partner com:con solutions GmbH. A detailed consultation and workshop phase was conducted through until mid 2005, followed by the installation and customizing phases. Paradigma staff training took place in early 2006, while the CRM system was being rolled out. Today almost 100 employees are enjoying the benefits of working with CAS genesisWorld, including 25 regional managers out in the field equipped with laptops.

Quickly proved a winner in practice

"By laying down precise objectives we were able to implement CAS genesisWorld rapidly. The employees were thrilled," reports Holger Degroot, Managing Director of com:con solutions GmbH. Today, customer and partner address data is integrated smoothly with debtor account setup in the enterprise resource planning, as laid down in the specification.

Paradigma now uses CAS genesisWorld to administer training courses and sales events, to send out documents and information material to customers and business partners, to manage complaints, to administer customer and partner bonus and reward points data, to respond to customer inquiries by e-mail, phone and fax by standardized methods, and to provide its partners with technical documentation and installation instructions. The regional managers also use the CRM system to organize their appointments scheduling and task lists. In all these ways, CAS genesisWorld has become an essential user-friendly tool, which makes everyone's day-to-day work easier and more efficient. As a result, "our customers are now more satisfied. Business processes run much more efficiently and faster", as Münchinger reports. The KIS system has proved its worth within a short space of time.



The network is being continually strengthened

Paradigma is continually optimizing the CRM system: As one example, after implementation the analytical CRM functionality was expanded by integrating HaPeC/COGNOS for sales reports. Detailed enterprise resource planning data and digitized end-customer inquiries are imported directly and automatically into the CRM system. The new information and reporting resources make work easier and also have established the foundations for professionally implementing the principle of comfortable control at Paradigma.

Based on the success of the project, a further 15 employees with laptops as well as the internal and field aftersales service functions will shortly be integrated into the CRM system. There are also plans to integrate the subsidiary firms RNO-Kesselfabrik and Ritter Solar.

Project Data

- In use since 2006
- CAS genesisWorld on 100 workstations
- Interface to SAP enterprise resource planning
- Laptop replication
- Large data volumes (15,000 orders, 2,500 visit reports and 5,000 service cases per year; 1,000 Internet inquiries per month; and 800,000 accounts vouchers containing 2,500,000 items every year)
- Sales reports and analyses with interface to HaPeC/COGNOS

Customer

Paradigma Energie- und Umwelttechnik GmbH & Co. KG, Karlsbad, Germany
www.paradigma.de

- Manufacturer of innovative gas, wood pellet and solar heat systems
- Founded in 1989
- Founded by Alfred T. Ritter, Chief Executive and co-proprietor of Ritter-Sport chocolate company
- Over 160 employees working in the headquarter, a further 160 in two subsidiaries around the Stuttgart area

Project Partner

com:con solutions GmbH, Cologne/Hanau, Germany
www.com-con.net

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 140 CRM specialists provide on-site support
- More than 2,000 corporate customers

Interested?

We are more than happy to provide you with advice and information about CRM for manufacturing companies.

Call our customer support hotline on ++49-(0)721/9638-188 or e-mail us at CASgenesisWorld@cas.de.

We look forward to hearing from you.