



Customer:



Weghsteen
www.weghsteen.be
Employees: 21
Industry sector: investment bank

Customer profile

Founded in 1890, Weghsteen NV expanded from an exchange broker to a stock market-listed investment bank. They are proud to manage the capital of many generations. Their clients are companies and individuals who want assistance in taking the right choices on investment.

Products in use:

- ▶ CAS genesisWorld Premium
- ▶ Report module
- ▶ Form & Database Designer module

Partner:



Infomat nv, België
Phone: +32 3 820 60 00
www.infomat.eu

Higher success rate – Banking Software Actor and CAS genesisWorld work in harmony

"CAS genesisWorld functions as an extension of our actual IT program Actor. By combining the two programs we gain a high-level CRM functionality. This enables us to follow up leads and customers more accurately. An improved lead follow up translates into a higher success rate."

Sven Jongbloet, Commercial Director



Requirements

- ▶ Management of stock exchange portfolios
- ▶ Real-time stock exchange tracing
- ▶ Follow up of clients and prospects
- ▶ Performance management
- ▶ Can be integrated with banking software (Actor)
- ▶ Streamlines internal processes
- ▶ Supports a stronger marketing approach
- ▶ Reports on follow-up actions
- ▶ Tracing sales performances

Benefits and advantages

- ▶ Speeds up many work processes
- ▶ Complete overview of all the touchpoints, information and activities in a customer dossier
- ▶ Detailed reports of contacts, information requests and stock quotes
- ▶ 40% more visitors to information events due to proactive marketing communications
- ▶ Real-time overview about broking portfolios (exchange levels, stocks)
- ▶ Fast evaluation of key figures, visit reports, accounts, and so on

Solution

With the integration of CAS genesisWorld into the Actor banking software, many additional functions were added that made a great impact and improved the overall performance throughout the entire company. For example, each client file is now directly linked to the investment funds and chances of profit can easily be estimated. The CRM system was implemented very fast and quickly proved to be the right choice.



CAS Software AG
CAS-Weg 1 - 5
76131 Karlsruhe, Germany
Phone: +49 721 9638-188
CASgenesisWorld@cas.de
www.cas-crm.com