



## Success story



CAS genesisWorld

### Industry

Science and research

### Objectives/requirements

- Central contact database and central information system
- Display addresses in various international formats
- Event management
- Flexible evaluations as a basis for reporting
- Provide support for all internal administration processes
- Independent system configuration
- Connectivity with other database systems, for example, for reviewer management
- Relational database structure

### Benefits and advantages

- Every employee now has consistent access to contact data including a comprehensive contact history
- Provides support services when planning and executing our own events
- Intelligent search functions enable the easy creation of target groups for events
- Workflow templates now simplify and support internal processes
- Enables simple appointment management
- We are free to implement our own enhancements and customizations for new requirements without needing any programming knowledge

## CRM in the heart of Paris

The Deutsches Historisches Institut Paris (DHIP) is in many ways unique. Since 1954 in Paris, French and German scientists have been cooperating on research projects on Western European history from the middle ages to the present day. The institute offers the ideal infrastructure for this kind of collaboration. This includes the public reference library, but also CAS genesisWorld. The software supports the institutes employees in their contact data and event management activities. And as a federal trust, the DHIP is major player on the international, historical research scene. It assumes a mediating role and also plays an active role in the areas of science and socio-political issues between France and Germany. The institute won the Customer Excellence Award for their future-oriented implementation of the CAS genesisWorld CRM solution.

### More than 120 events and counting...

Every year, the institute invites people to attend around 120 events. And because of the strain of the ever increasing numbers of symposiums, lectures and seminars due to staff numbers remaining constant, the DHIP employees required a tool that would help them in their daily tasks as well as unify all the work processes across the institute. In addition, they had to contend with a recurring update problem, as Benedict Fehler, IT Manager for the institute reports: "Before we implemented the CRM solution, we were working with a Filemaker database of our own, which would crash the operating system at every update. We were desperate for an update proof, and cost effective solution."

### Clearly defined requirements

Benedict Fehler and his colleague from accounts, both drove to the CRM expo to get a better idea of what exactly was on offer in terms of CRM solutions and to see just what the software houses offering them were like. The requirements for the new CRM solution had already been clearly defined: flexible, updates independent and user friendly. CAS genesisWorld made it onto their shortlist of possible solutions, and the certified CAS partner, itdesign, from Tübingen, presented the solution to the institute in Paris. The institute's management team were convinced by a number of factors, the solid technical basis of the solution, the investment security and the solution's flexibility. "We set stringent requirements for our service providers", said Fehler, "We were satisfied with itdesign from the outset as they were punctual, quick and very professional."

### Pilot project group - "that was the best idea"

Our intention was to use CAS genesisWorld across the institute, and to have all of our employees use it regardless of their department whether science, administration, events, IT, facilities management, editing or the library. The key to ensuring high levels of acceptance and intensive usage had already been determined at the start of the project: "The best idea was to set up a pilot project group", stated Fehler. This purpose of the group was not to just include the IT professionals, but to also ensure that employees were included from every department whose IT knowledge, age and sex varied. "As a result, employees felt included from the start, and any reservations were addressed at the start", remembers Fehler. Regular project progress reports were communicated to the whole institute. And the office-grapvine took care of communicating the numerous new options and benefits that CAS genesisWorld would bring.



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*"With CAS genesisWorld we can offer our customers more service, stage more events and carry out intensive networking without have to change our existing staffing levels."*



Benedict Fehler, IT-Manager DHIP

#### Project data

- CAS genesisWorld Premium suite in use since 2012
- Initial discussions on the subject of CRM held in September 2011, subsequent visit to the CRM expo took place in October 2011
- Presentations were held in November 2011
- The software was selected in December 2011
- The installation was finalized in January 2012
- The "live" operational hand-off took place in August 2012 - roll-out institute wide
- Modules: Marketing pro, Report, Form & Database Designer

#### Customer

Deutsches Historical Institute Paris  
www.dhi-paris.fr

- The Deutsches Historical Institute Paris (DHIP) is a major player on the international historical research scene in conjunction with the Max Weber trust
- Founded in 1954
- With 60 employees
- One of six German institutes abroad, specializing in historical research, and supported the Max Weber trust
- Special scientific library

#### Project partner

itdesign GmbH, Tübingen  
www.itdesign.de

#### CAS genesisWorld

- Professional customer management
- Supports internal processes, increases efficiency
- Specially-designed for the requirements of SMEs
- Very good price-performance ratio
- Flexible, easy to integrate, extendable
- Established product – winner of several awards
- Over 200 CRM specialists provide on-site support
- Being used successfully by more than 7,500 companies

#### Interested?

Should you have any questions on CRM, we would be delighted to help you.

You can reach our customer hotline on +49 721 9638-188 or by e-mail at [CASgenesisWorld@cas.de](mailto:CASgenesisWorld@cas.de).

We are looking forward to hearing from you!

## Modular structure allows for optimal customization

We used individual workshops to define processes exactly, for example, for event management, and then we adapted our requirements. This resulted in a number of new objects being created with the Form & Database Designer such as inventory and key.

## Acceptance guarantees high usage

"The capabilities and features of CAS genesisWorld have been very well received", observed Fehler. Not least, features such as the telephony integration which impresses a lot of people. On receiving a phone call, employees can see at once who is calling, they can write and save notes during the call, or make calls out of the CRM system directly. The reporting functions are also viewed as a great advantage. As the detailed search function enables employees to create lists from which they can see all the relevant details for an event at a glance, and then if they need to, analyze them.

## Uniform processes simplify annual reporting and event management

Using CAS genesisWorld your employees will enjoy a fundamental simplification of all work processes. Fehler names the annual report as a case in point: "Before CAS genesisWorld, compiling and sending this important document consisted of several weeks' work, a large part of which included the laborious collecting of data from various sources. Now, the employees just activate a checkbox in CAS genesisWorld, and the annual report is sent to the right people automatically." And what's more, employees enjoy more labour saving features throughout the whole event management process, for example, sending invitations, managing speakers, or organizing the caterers. "They can manage everything with CAS genesisWorld, from hotel accommodation for the participants to the table order in the event room", explained Fehler happily when talking about using CAS genesisWorld operationally.



The Institute was awarded the Customer Excellence Award for their future-oriented CRM deployment.

## Summary: Providing more service with constant personnel

The Deutsche Historische Institute has found a CRM solution that is easy to configure. Any changes to the institute's requirements are implemented quickly and independently. Workflow templates model internal processes, these templates are especially useful with respect to the planning and staging of events. In addition, all the institute's projects can be accessed longterm. "Using CAS genesisWorld we can offer more service, organize and stage more events and invest more time in networking, and all of this without increasing the numbers of personnel," said Fehler. What would he recommend for decision-makers who are considering a CRM solution: "Make sure to discuss all of your requirements beforehand, so that you have a framework to base your decisions and objectives on - this will save you a lot of money". Fehler also recommends setting up an "interdisciplinary" pilot project group at the start of the project to ensure that you involve key users in interdepartmental dialogs early on. "Inclusion and transparency are the keys to success", confirmed Fehler, "So instead of feeling apprehensive and resisting the implementation, your colleagues will be delighted about the CRM solution, and will love how it can help them on a daily basis."