

Reference

Wölfel

CAS **genesisWorld**

xRM and CRM for small and medium-sized companies



# Good vibrations with

# CAS genesisWorld

**At the Wölfel Gruppe everything revolves around acoustics, vibrations and sound: To remain receptive to customer wishes in customer relationship management, the company relies on professional CRM and customer centric processes.**

Since 1971, the company has been offering methods for the analysis and limitation of vibrations - worldwide and in very diverse areas. Such as for wind energy installations and power stations, environment and emissions protection such as in the areas of traffic and transport. There are over a 100 employees working at the headquarters in Würzburg and across three other locations.

## Support for sales and marketing

Wölfel's customer relationship management requirements are as diverse as the target industries they serve. "We were looking for an instrument which we could use to connect and efficiently promote sales and marketing", reports Monika Hofmann Rösener, Head of Marketing at Wölfel. The existing ERP system was pushed increasingly to its limits due to the seamless documentation of the sales process and contact maintenance. The sales staff managed this by using individual lists.

The goal was to establish a CRM solution that creates a flow between sales and marketing with a view to orders being placed in the ERP again. The new system should, therefore, be suitable for both sales and marketing and available via an ERP interface. In addition, the management team also required that the ERP data remained secure from external access.

## CRM that inspires

"It should be a solution for SMEs" emphasized Monika Hofmann-Rösener. That means a system which can be tailored to the individual requirements of both the company



### Sector/industry

Engineering services and software

### Objectives/requirements

- Strengthen and link sales and marketing
- Professional lead management
- System supported marketing- and sales processes
- Supplement/interface to in-house ERP
- protection against external access to ERP data
- User friendly and highly customizable

### Benefits and advantages

- Frictionless workflow between sales and marketing including order placement in the ERP
- Eases the burden of routine work processes and secures company knowledge
- Rapid start to digitalization using the standard version and investment security thanks to a CRM solution that grows with your business.
- Automatic sales process from the first enquiry through to quotes, renegotiations, sales and after sales.
- Accurate marketing campaigns thanks to comfortable filter functions for addressing individual target groups

and the user, it should offer numerous features that ease the burden of daily work and help to secure company knowledge. We tested a number of products. We shortlisted CAS genesisWorld and one other system, CAS genesisWorld ticked all the boxes we were looking for and, as a bonus, was really user friendly: "The ease of use was really impressive to us from the beginning", said Timo Klaas, Head of Sales at Wölfel Wind Systems.



The standard version covered what we needed

The implementation and interface with ERP went seamlessly thanks to the CAS partner: Sellmore. "It also helped that we could start directly with the standard version of CAS genesisWorld," explains Hofmann-Rösener, Head of Marketing. "We thought that our requirements are very specific. But, fortunately for us, it was not necessary to make that many changes." And if we need to add extensions at a later date, CAS genesisWorld can grow with the business thanks to its intelligent modules and interfaces.



» CAS genesisWorld optimizes our sales processes across all locations. «

Timo Klaas, Head of Sales

At Wölfel we mainly use the browser-based Web version of the CRM solution. This enables location independent access. "Employee acceptance is very good," emphasized Timo Klaas. "CAS genesisWorld optimizes our cross-site sales process." The employees now enjoy a 360 degree view of every customer thanks to the digital customer dossier: All the information is available in a structured form. Besides contact data, the dossier also contains appointments, tasks, a contact history, notes, quotes and orders.

## CAS genesisWorld

### Project data

- CAS genesisWorld Platinum Suite
- Schnittstelle zu ERP und zu Leaderfassungssoftware SaleStratus

### Customer

- Wölfel-Gruppe, [www.woelfel.de](http://www.woelfel.de)
- Ingenieur-Lösungen, Systeme und Software zur Analyse und Begrenzung von Schwingungen, Strukturmechanik und Akustik
- 1971 gegründet
- Über 100 Mitarbeiter an vier Standorten

### Project partner

- sellmore GmbH, Dresden, [www.sellmore.de](http://www.sellmore.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 – multiple award-winning
- Over 200 CRM specialists provide on-site support
- Used successfully by more than 20,000 companies

## Sales potential

Sales opportunities can be recorded and actioned systematically, from the first contact to quotes, renegotiations and sales. "Thus, in sales we can recognize what further steps are necessary to ensure the successful closing of a deal," explains Timo Klaas, Head of Sales.

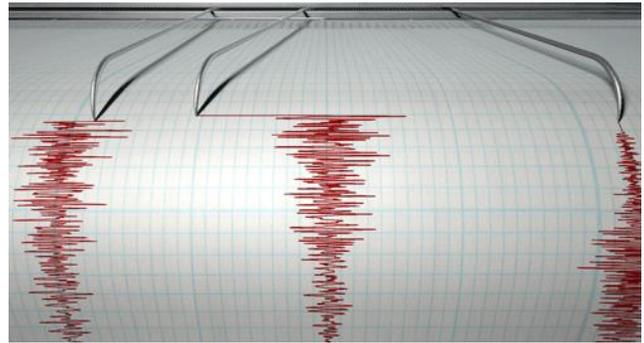
## More accurate marketing campaigns

In marketing we can select target groups accurately using convenient filter functions and then use multiphase campaigns to address them individually. Reactions are stored centrally "This spares us targeted follow-ups," explains Monika Hofmann-Rösener. "Our marketing activities are thus more effective, keeping wastage to a minimum."



» CAS genesisWorld provides us with all the important figures we need for reports and thus builds a solid foundation for decision-making. «

Monika Hofmann-Rösener,  
Head of Marketing



More time for actual customer requirements thanks to CRM. Welcome to the world of vibrations, structural mechanics and acoustics.

The interface between sales and marketing has proven itself on a daily basis. Qualified leads, which are promising contacts who could become prospects, are forwarded to sales automatically.

## Conclusion

Due to these positive experiences the intention is to deploy the CRM solution in other areas of the company, for example, for customer complaints. The goal is to establish CAS genesisWorld as the central repository of all relevant customer information to allow as many processes as possible to converge.



More testimonials

[www.cas-crm.com/references](http://www.cas-crm.com/references)



We would be glad to talk to you about CRM and customer excellence.



CAS Software AG  
CAS-Weg 1 - 5  
76131 Karlsruhe

Phone: +49 721 9638-188

E-Mail: [CASgenesisWorld@cas.de](mailto:CASgenesisWorld@cas.de)

[www.cas-crm.de](http://www.cas-crm.de)

