

Your CRM

for excellent project management



Customer Centricity
CERTIFIED

CAS Consulting

A solution tailored to the needs of Consulting companies



Impress customers with expertise and effective project management

The success of your customers will safeguard the long-term success of your business. Top-class advice and outstanding project management are key to success. Success can be achieved with a CRM solution specially tailored to those demands which effectively supports all staff in customer and information management. That saves time, minimizes cost, and provides the freedom to focus on what really matters: giving your customers top-class service.

The complete solution for consultants

CAS Consulting is an industry solution specially tailored to the needs of consultants and based on sophisticated cross-company functionality: Efficient project management and centralized customer information gathering provide your staff with optimal support across the full range of operations. Cross-project knowledge management enhances staff efficiency in acquisition, sales and consulting, while management has a constant eye on the key information.

Professional project management for happy staff and customers

Bring structure into your consulting contracts. CAS Consulting assists with schedule and resource planning, efficient execution, and controlling based on evaluation reports. Times, expenses and purchased services are recorded and cross-checked against the budget. Automatically generated reports provide for planning certainty. Thanks to structured processes throughout the business, your staff are motivated and efficient in their work. Your customers trust in the services you offer, and have the feeling that they are getting top-class support.

What are the benefits of CAS Consulting for your business?

- ✓ Improved closing rate based on optimal presentation of your competencies
 - ✓ Higher contribution margins thanks to appropriate quoting
 - ✓ Cross-selling based on utilization of your knowledge base
 - ✓ Shorter project runtimes thanks to efficient processes
 - ✓ New customers based on utilization of full customer base potential
 - ✓ Higher contribution margins on projects thanks to reduced need for corrections
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What objectives can be achieved with CAS Consulting?

All customer-related information in view

- Quick overview of consulting projects
- Comprehensive customer knowledge for high levels of staff competency
- Complete customer dossier with e-mail and phone contact history
- Access to all customer information from any location
- Expertise creates trust and respect
- Access to centralized, continually updated address database
- Target group-specific selection and successful marketing campaigns
- Effective exploitation of selling opportunities and potential

Efficient project planning, management and calculation

- Structured project planning and management
- Planning of goals, tasks, milestones and resources
- Cross-checking of working times, expenses and external costs
- Transparency of current project status; ad-hoc reports and early-warning system
- Integrated reporting with proof of activity completion and project status
- Project controlling with nominal/actual comparisons
- Simple time recording

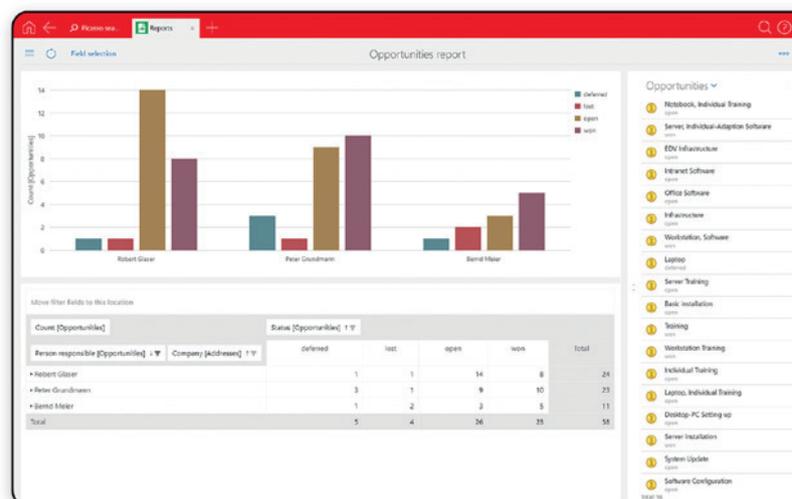
Nominal/actual comparisons keep projects on course and form the basis for ever more accurate costing and future quoting.

Cross-team collaboration

- Cross-project knowledge management
- No loss of information when project teams change
- Simple schedule and task management
- Unified correspondence
- Centralized document filing and documentation

Management planning certainty

- Efficient capacity utilization thanks to clear resource planning
- Consultant turnover and capacity utilization data
- Decision-making certainty due to real-time reports
- Overview of all relevant operations across all levels
- All-inclusive, clearly structured management dashboards



Close orientation to customers' needs and efficient project management

Know all about your customers at all times

A continually updated address database is key to successful communication with your customers. The customer dossier provides comprehensive information on individual contacts. Staff can see at a glance what projects are currently in progress, and which colleagues are working on them. Information and details, such as appointments, tasks, phone memos, correspondence, sales opportunities and invoices, are stored in a structured way, chronologically. Personalized access rights control the secure handling of information. Your consultants are well informed in advance of every consultation.

Good teamwork makes time to focus on what really matters

With CAS Consulting, all staff access a centralized database. That enables inter-departmental, cross-company team working, and supports scheduling and task management, document editing, and joint project handling. At the same time, a comprehensive rights system means the knowledge is always handled securely, in confidence. Your consultants view everything at a glance at all times, are optimally informed, can be sure of providing expert advice, are greatly aided in their day-to-day work, and so have more time to focus on what really matters – your customers.



» Confidentiality, structured processes and transparent networks are key to good cooperation with our customers. CAS Consulting helps us to meet our exacting standards for customer care and customer centricity across all our sites and departments. «

Sabine Laude

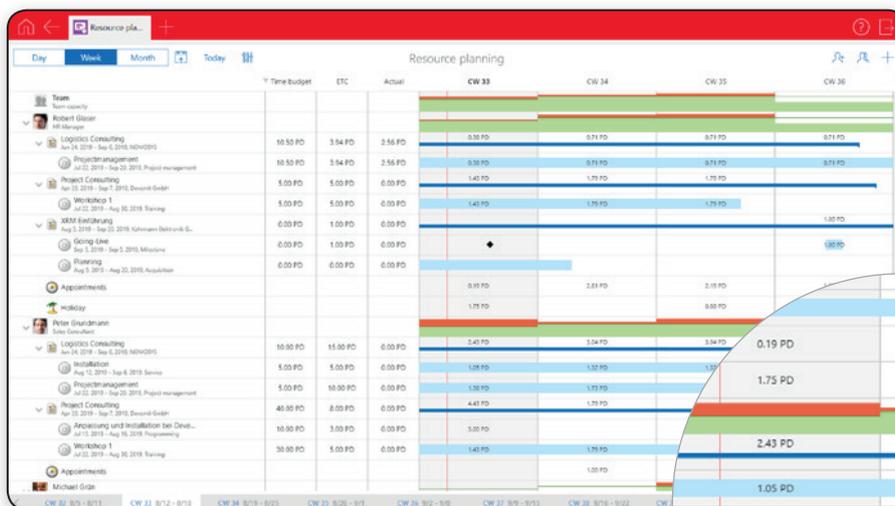
Senior Business Analyst CRM,
v. Rundstedt & Partner GmbH

Achieve outstanding results with targeted project management

Plan and manage your consulting projects assuredly and effectively with CAS Consulting. Goals, tasks, milestones and resources are planned right from the beginning. Working times, expenses and external costs are recorded and automatically cross-checked against the budget. The continually updated project status, ad-hoc reports and an early-warning system help you keep your project on course at all times.

Effective resource planning for optimum capacity utilization

CAS Consulting makes it easy for your project team to plan resources. The planning view provides a clear visualization of project expenditures. The graphical view allows you to monitor your staff capacity utilization, assign tasks in a targeted way, and avoid scheduling collisions and bottlenecks. In this way you can plan your resources effectively and manage you capacity utilization optimally.



The resource planning feature means you can keep a close view on your staff's capacity utilization, assign tasks in a targeted way, and avoid scheduling collisions and bottlenecks.

Keep a firm eye on projects at all times with time recording and budget planning

CAS Consulting ensures customer and project-specific recording of working times, expenses and external costs – also when on the road. Including budget and material costs, even residual expenses and valuations are detailed at hourly rates. Reports provide concise evaluation as to the current status of your projects. Daily updated status reports means projects can be billed quickly and easily – with an ERP interface even at the press of a button. Your project management is made transparent and efficient, and you are able to bill your consulting services promptly.

Keep up-to-date at all times with mobile access

Whether your staff are working at the customer or in their home office, your consultants are using their smartphone, laptop or tablet, or your business is spread across multiple locations: CAS Consulting ensures direct access to continually updated information. Thanks to responsive design,

CAS genesisWorld adapts seamlessly to different display sizes and specific features of your devices.

Efficient selling and management

planning certainty

Exploit business opportunities by methodical selling

The key to successful selling is to identify and exploit all business opportunities. CAS Consulting puts method into your selling. You retain an overview of sales opportunities from the initial contact through to closing, and are able to boost your selling success in a lasting way. The notification and actions service provides prompt notification of events such as customers' birthdays or schedule changes. Forecasts and reports on sales potential can be generated at the press of a button. With the built-in georeferencing feature, you can cluster data graphically: heatmaps provide a geographical breakdown of sales revenues and potential.

Targeted marketing impresses customers

With CAS Consulting campaigns are planned quickly and implemented in a targeted way. When sending out invitations to events, sophisticated search and filter criteria identify the right contacts, selecting the appropriate channel of communication according to the preferred and allowed contact methods. CAS Consulting ensures that you target contacts in the appropriate way – such as considering whether consent to make contact has been given. It also offers a wide range of functions which embed statutory data protection measures within your business processes. User-friendly reports provide you with an insight into the status of a marketing campaign at all times, as well as offering a concise overview.

Transparency aids sound decision-making

Customized management dashboards provide your management team with an overview of all business processes. Daily updated customer-specific revenue reports, profitability reports and sales forecasts form the basis for all decision-making. A sophisticated multi-level rights system ensures that all staff see exactly what they need, and are authorized, to see. Your managers are provided with an overview of all key performance indicators, and are able to take the right action in response. Department heads have a detailed insight into their area of responsibility, and consultants have a quick overview of their customers. All this helps keep your business on course for success.

Revenue reports help you keep a close eye on the profitability of your customer.

Revenue reports – Devemit GmbH



Sales revenues in the last 9 quarters



CAS Software AG –

market leader with 30 years' CRM experience

CAS Consulting is a product by CAS CRM, a SmartCompany of CAS Software AG. Over 25,000 companies and organizations including global market leaders, such as Daimler, Airbus, Fraunhofer, MSI and many others, employ our solutions and rely on our expertise. We have received several awards in recognition of our innovative product range and our commitment to the SME sector. CAS Software AG is a TOP 100 Innovator, and as Germany's best IT employer has been recognized as one of the country's TOP Employers in 2016. Our software has been awarded the "Software Made in Germany" and "Software Hosted in Germany" seal.

For more information visit

www.cas-crm.com/products/cas-consulting



CAS Software AG

- Owner-managed business
- Over 400,000 delighted users in more than 40 countries
- One of Europe's leading suppliers of CRM solutions with a clear focus on the small and medium-sized enterprises (SME) market
- Over 200 certified distributors and solution partners
- Investment in innovation per year: 24% of turnover
- Multi-award winning solutions



» Our business is built on reliable, individual customer care. CAS Consulting creates more transparency for everyone through the comprehensive and up-to-date digital dossier – also available to those working mobile out in the field. CRM takes a lot of the strain out of your daily work so that you have more time for what matters most – your customers. «

Ursula Häberlein

Commercial manager,
BZH GmbH, German Consulting Center
for Hospital Epidemiology and Infection Control

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