



**Your CRM**

for top-class service

Customer Centricity  
CERTIFIED

**CAS IT Services**

A solution tailored to the needs of IT companies



# Make room for outstanding customer relationships

Whether IT service providers or software manufacturers: impressing your customers will safeguard the long-term success of your business. Top-class service, efficient project execution and optimal customer support are key to success. Benefit from a CRM solution which effectively supports all staff in customer management. That saves time and money, and provides you with the freedom to focus on what really matters: giving your customers top-class service.

## More competitiveness for your IT business

In the fast-moving, highly competitive IT sector, profitable customer relationships and fast response to customers' needs and to market changes are key to success. The CAS IT Services solution is specially tailored to the needs of the IT sector. It will assist you in marketing products requiring explanation throughout the customer lifecycle: from acquisition, through the advisory stage, to release management and support.



## CAS IT Services – a tailored, yet flexible complete solution

CAS IT Services is the right fit from the beginning, and can be expanded as required at workstation level. That means you have the right solution for your business at all times - all integrated behind a visually appealing, intuitive user interface meeting the highest demands in terms of usability and data security.

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## What are the benefits of CAS IT Services for your business?

- ✓ Improved closing rate based on a comprehensive sales process
  - ✓ Higher contribution margins thanks to unified operations
  - ✓ Increased business volumes based on utilization of your complete knowledge base
  - ✓ Shorter project runtimes thanks to efficient processes
  - ✓ Greater customer satisfaction
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## Benefits of using CAS IT Services

### Always well informed about the customer

- Access to up-to-date address data, anywhere, any time
- Customer dossier with all details for a transparent 360° view
- Target group-specific selection for successful marketing campaigns
- Identify and effectively exploit selling opportunities and potential

### Efficient project planning, management and calculation

- Efficient project and resource planning with time recording
- Transparency in relation to processes and current project status
- Project controlling with nominal/actual comparisons

### Impress with fast, competent service

- Helpdesk support in handling service inquiries
- Hotline backed by knowledge database, FAQs and online support
- Full cost control

### Promote inter-departmental collaboration

- Simple coordination of appointments and task management
- Efficient, unified correspondence
- Centralized document management with quick overviews of all key information

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» Using the CAS IT Services CRM solution has a positive effect on all our working processes, and is now an integral part of our business. «

Ingo Kubatschka

CEO

K-iS Systemhaus GmbH & Co. KG

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# Live a customer-oriented philosophy throughout your business

## A new standard of address management

CAS IT Services automates address maintenance. After simply recording addresses, these addresses are checked for correctness and for duplicates at the click of a button, cross-checked against current reference databases, and enriched with decision-maker data as necessary. The address dialog box adapts in terms of content and ergonomics to users' individual needs.

## Access to data any time, anywhere

Wherever your staff are working, and whatever device they are using: CAS IT Services provides intuitive access to continually updated data and adapts to any user interface thanks to its responsive design. Information is available on tablet, smartphone and laptop by replication or via online access. That means your staff are ideally informed at all times.

## At the core: the customer dossier, providing a 360° view

The customer dossier provides all staff with at-a-glance customer information. All appointments, tasks, phone memos, service contracts, product usages, correspondence, sales opportunities, support inquiries, invoices and projects are chronologically sorted in a structured way.

## Transparency for inter-departmental collaboration

A single centralized database for all supports appointment coordination, task management, document editing, joint project working, and handling of support cases. Your staff are able to provide expert advice and information, make sound decisions, and are greatly aided in their day-to-day work. That motivates them, and saves them time to focus on what really matters: your customers.



Customer dashboard – quick overview of all key information.

## Effectively and successfully exploit selling potential

CAS IT Services will enhance your selling success, because it enables you to retain an overview of sales opportunities from the initial contact through to closing. The automated notification and actions service provides prompt notification of events such as key account managers' birthdays, schedule changes, or escalations. Forecasts and reports on sales potential can be generated at the press of a button. The complete sales process is made transparent, efficient, and successful.

## Quote and receipt drafting made easy

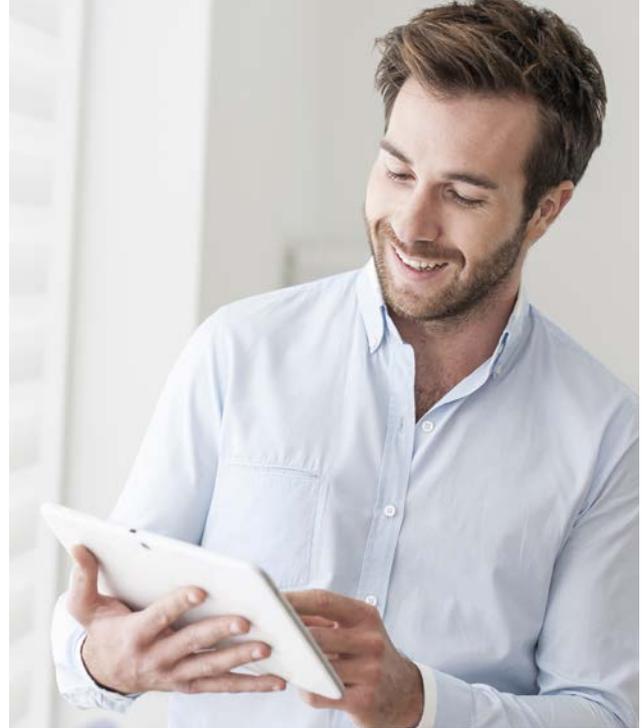
Safeguard your professional image by drafting quotes and receipts quickly and correctly. You can handle these commercial tasks in CAS genesisWorld via the interface to your ERP system using ERP connect or with the Easy Invoice module. Changes to quotations are documented and made transparent. When an order is placed, you can generate a project from the quote, importing key data such as licenses or services.

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» With CAS IT Services we were able to improve our service support, make our business processes leaner, and so save on costs and strengthen our competitiveness. «

**Markus Hengstenberg**  
Managing Partner and co-founder  
of oraise GmbH

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## Target marketing campaigns efficiently

With CAS IT Services campaigns are implemented quickly and in a targeted way. Using the sophisticated search and filter criteria, you can, for example, identify cross-selling potential, find all current service contract customers, and display them in a map view. The appropriate channels of communication are selected according to the preferred and allowed contact methods. Customer responses are logged, acquired leads are forwarded directly to Sales, and revenues are recorded. User-friendly reports provide you with status updates at any time.



The revenue forecast and the order book provide a complete picture of expected and actual sales revenues.

# Impress with smooth project execution and outstanding services

## Efficiently manage projects and resources

CAS IT Services enables you to plan and structure your projects. Project risks, phases, milestones, goals, tasks, resources, budgets, costs and times are incorporated right from the beginning. You keep your projects on course at all times based on the project status, ad-hoc reports, and an early warning system. The graphical view allows you to monitor your staff capacity utilization and avoid appointment collisions.

## Transparent project controlling and reporting

The assignment of working times to projects is the starting point for comprehensive project controlling. CAS IT Services provides detailed time recording – specific to customer and project – including residual expenses and internal charging of different hourly rates. Even budget and material and external procurement costs are included. Comprehensive reports indicate the current status of your projects – specific to a single project or across multiple projects as required. Daily updated status reports form the basis for your project billing.

## Impress with service

CAS IT Services aids fast, competent provision of advice and information. Your service staff have an overview of specific agreements, including service levels, response times, and selected contacts, and are able to process and forward inquiries efficiently. The integrated contract management feature gives an immediate indication of what services are included, in what volume and at what cost.

## Helpdesk maximizes efficiency in handling service inquiries

The helpdesk records tickets, error reports or inquiries, as well as managing handovers and competencies. Your Sales Department is notified of incoming inquiries, and your customers are able to track tickets online. Automated recording of processing times and equipment used ensures full cost control. In this way, your customers experience highly professional services.

## Knowledge database and online support back up hotline

All completed service inquiries are stored in a knowledge database, from where they can be quickly retrieved using sophisticated search functions. The FAQs database presents the most frequently asked questions together with supplementary information such as charts and illustrated guides for your customers.



With the project plan, milestones can be defined and staff capacity utilization monitored at any time.

# CAS Software AG – market leader with 30 years CRM experience

CAS IT Services is a product by CAS Software AG. Over 20,000 companies and organizations including global market leaders, such as Daimler, Airbus, Fraunhofer, OKI 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-it-services](http://www.cas-crm.com/products/cas-it-services)



## CAS Software AG

- Owner-managed business
- Over 300,000 delighted users in more than 40 countries
- German market leader in CRM for the SME sector
- Over 200 certified distributors and solution partners
- Investment in innovation per year: 22 % of turnover
- Multi-award winning solutions



» (...) Dynamic reports provide us with a constant overview, and unified project templates make our day-to-day business operations easier. «

**Tobias Hammerschmidt**

CEO

Director of Hübner IT Solutions GmbH



# Contact



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