

**Your CRM**

for research and science

**Customer Centricity  
CERTIFIED**



**CAS Research**

A solution tailored to the needs of Research companies



# Impress partners

# with targeted communication

Whether research institutes or scientific bodies: the ability to impress partners in the business and public administration sphere will safeguard long-term success. Professional project execution with targeted events-related communication is key to success. Success can be achieved with a CRM solution specially tailored to those demands which effectively supports all staff in the transfer of technologies and specific know-how. That saves time, minimizes costs, and provides the freedom to focus on what really matters: giving your partners top-class service.

## The complete solution for research institutes and scientific bodies

The CAS Research solution supports multiple organizational units, including across different locations. To that end, a centralized data resource is provided – with personalized rights as required – and also including mobile access. That supports staff in project planning, acquisition of research and development projects, and event management.



## Professional project management for happy staff and partners

CAS Research enables you to keep a handle on all your project business: From professional planning including budgets, resources and expenses, through efficient execution including time and cost recording, all the way to the controlling phase, your acquisition and research projects are bound to run smoothly. Automatically generated reports deliver planning certainty. Thanks to structured processes throughout the business, your staff are motivated and efficient in their work. Your partners get top-class support, and trust in the services you offer.

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## How does CAS Research benefit you?

- ✓ Improved closing rate based on comprehensive project acquisition processes
  - ✓ 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
  - ✓ Enhanced partner satisfaction
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# What objectives can be achieved with CAS Research?

## All information in view

- Access to up-to-date user-sensitive address data and records at all times
- Access to all partner information and projects from any location
- Comprehensive support in the acquisition of research and development projects
- Technology and knowledge transfer between science and industry

## Cross-team, cross-institutional collaboration

- Simple schedule coordination and task management, and unified correspondence
- Maintenance of networking contacts
- Centralized document filing/documentation
- No loss of information when project teams change

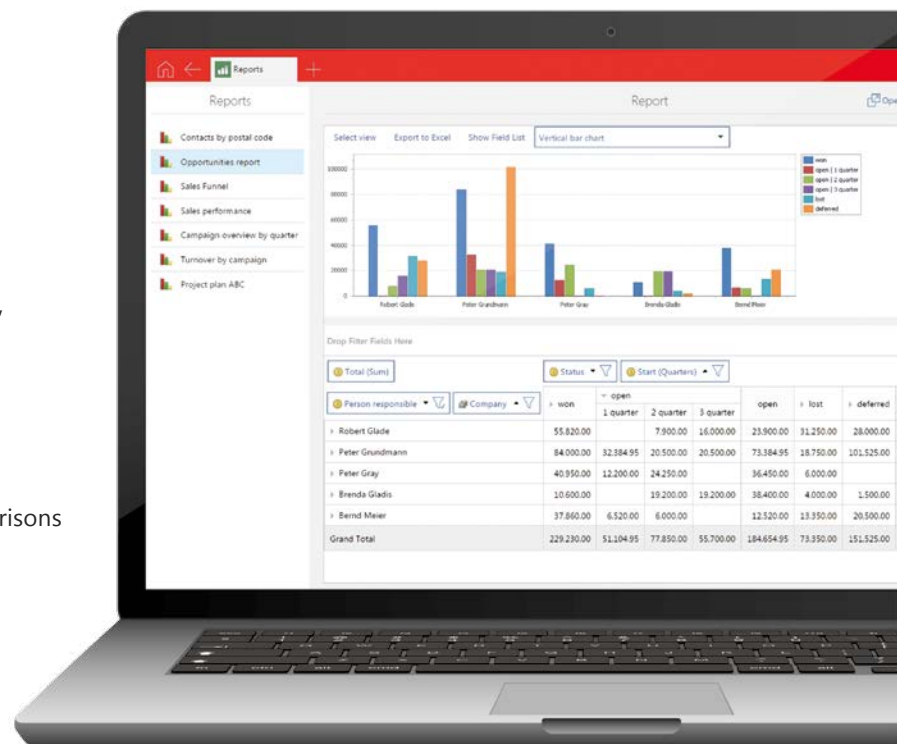
## Efficient project planning, management and costing

- Structured project planning and management
- Transparency in relation to (also external) staff, project topics and status
- Management of participating partners
- Integrated reporting with proof of activity completion and project status
- Project controlling with nominal/actual comparisons

## Targeted communications and efficient event planning

- Target group-oriented, personalized addressing through form letters and e-mails
- Extensive address filtering options, such as by sector
- Targeted campaigns and response recording across all communication channels
- Campaign evaluation and cost control
- Efficient event organization

- ▼ Calculate your current project costs at any time based on time records, expenses, purchased services and receipts.



# Efficient project management and good teamwork

## Targeted project management delivers outstanding results

Plan and manage your events and research projects assuredly and effectively with CAS Research. Project phases, milestones, risks, goals, tasks and resources are incorporated right from the beginning. Times, external costs, labor costs and travel expenses are recorded and cross-checked against the budget. You keep your projects on course at all times based on the project status, ad-hoc reports, and an early-warning system.

## Keep a firm eye on projects at all times with time recording and cost accounting

With CAS Research you can record times, expenses and external costs – specific to partner and project. Including budget and material costs, even residual expenses and valuations are detailed at hourly rates. Reports provide

» Using CAS Research has proved highly beneficial, not just financially, but also in terms of our image, and in demonstrating our professionalism. «

Dr. Günter Hörcher

Head of Strategy and European Relations  
at Fraunhofer IPA

concise evaluation as to the current status of your projects. Your project management is made transparent and efficient, and you are able to bill your consulting services promptly.

2015	Time budget	ETC	Actual	CW 24	CW 25	CW 26	CW 27	CW 28	CW 29	CW 30	CW 31
Antonio Marazziti Diplomant	22.00 PD	18.71 PD	3.29 PD								
CAS gemasWorld for Devemi... May 18, 2015 - Aug 25, 2015	12.00 PD	10.75 PD	1.25 PD			1.54 PD	1.54 PD	1.54 PD	1.54 PD	1.54 PD	1.54 PD
Development and installat... Jun 22, 2015 - Aug 7, 2015	12.00 PD	10.75 PD	1.25 PD			1.54 PD	1.54 PD	1.54 PD	1.54 PD	1.54 PD	1.54 PD
Software development for NG... Apr 20, 2015 - Jul 16, 2015	10.00 PD	7.96 PD	2.04 PD	0.15 PD	0.15 PD	0.15 PD	0.15 PD	0.15 PD	0.15 PD	0.15 PD	0.15 PD
Custom software develop... Jun 1, 2015 - Jun 17, 2015	10.00 PD	7.96 PD	2.04 PD	0.15 PD	0.15 PD	0.15 PD	0.15 PD	0.15 PD	0.15 PD	0.15 PD	0.15 PD
Appointments					1.13 PD			0.62 PD	0.50 PD		
Holiday			4.00 PD								
Michael Green Project Manager	25.00 PD	24.34 PD	0.66 PD								
CAS gemasWorld for Devemi... May 18, 2015 - Aug 25, 2015	10.00 PD	10.00 PD	0.00 PD			1.43 PD	1.43 PD	1.43 PD	1.43 PD	1.43 PD	1.43 PD
Project management	10.00 PD	10.00 PD	0.00 PD			1.43 PD	1.43 PD	1.43 PD	1.43 PD	1.43 PD	1.43 PD
Software development for NG... Apr 20, 2015 - Jul 16, 2015	15.00 PD	14.34 PD	0.66 PD	0.98 PD	0.96 PD	0.96 PD	0.96 PD	0.96 PD	0.96 PD	0.19 PD	0.19 PD
Custom software develop... Jun 1, 2015 - Jun 17, 2015	10.00 PD	9.71 PD	0.29 PD	3.19 PD	0.19 PD	0.19 PD	0.19 PD	0.19 PD	0.19 PD	0.19 PD	0.19 PD
Project management	5.00 PD	4.63 PD	0.38 PD	0.77 PD	0.77 PD	0.77 PD	0.77 PD	0.77 PD	0.77 PD		
Appointments					2.22 PD	0.39 PD		0.19 PD	0.69 PD	0.90 PD	
Robert Guide Sales Manager	20.00 PD	18.50 PD	0.00 PD								
CAS gemasWorld for Devemi... May 18, 2015 - Aug 25, 2015	10.00 PD	10.00 PD	0.00 PD			1.43 PD	1.43 PD	1.43 PD	1.43 PD	1.43 PD	1.43 PD
Project management	10.00 PD	10.00 PD	0.00 PD			1.43 PD	1.43 PD	1.43 PD	1.43 PD	1.43 PD	1.43 PD
Software development for NG... Apr 20, 2015 - Jul 16, 2015	10.00 PD	8.50 PD	0.00 PD	0.83 PD	0.83 PD	0.83 PD	0.83 PD	1.06 PD	1.06 PD		

◀ Plan and manage your projects from the draft stage through to completion in the schedule and resource planning view.



CAS Research provides ►  
access to up-to-date  
data at all times by  
replication, online  
or in the office.



## Centralized project information and documentation provide a clear overview

Centralized data storage with CAS Research gives you access to all documentation and information relating to the project partner, even when project teams change. That transparency provides your staff with an overview of the project stakeholders, project content, and the current project status. On new acquisition or research projects, knowledge gained from past projects can be easily transferred and applied.

## Good teamwork makes time to focus on what really matters

With CAS Research, all your staff access a centralized database. That allows for team working across organizational units, institutions and locations. Networks with participants from different departments are supported in schedule coordination and task management, document editing, and joint project handling. Your staff retain an overview at all times, are optimally informed, are greatly aided in their day-to-day work, and so have more time to focus on what really matters: your partners.

## Mobile data access anywhere

Whether your staff are working in their home office, are using their smartphone or laptop while away on visits, or your business is spread across multiple locations: CAS Research provides easy access to continually updated data by replication or online. The data can be viewed and edited as required. That means internal staff and external collaborators both within the organization and at other locations are always kept up-to-date.

## Fully informed about your partners at all times

A continually updated address database is key to successful communication with your partners. The partner dossier holds comprehensive information on individual contacts, so all staff know what projects, on what topics, are currently ongoing, and which colleagues or external collaborators are working on them. Information and details, such as appointments, tasks, phone memos, correspondence and sales opportunities, are sorted in a structured way, chronologically. Personalized rights to access partner-related information and projects and user-sensitive address data assure the secure, confidential handling of data, so your staff have exactly the information they need.

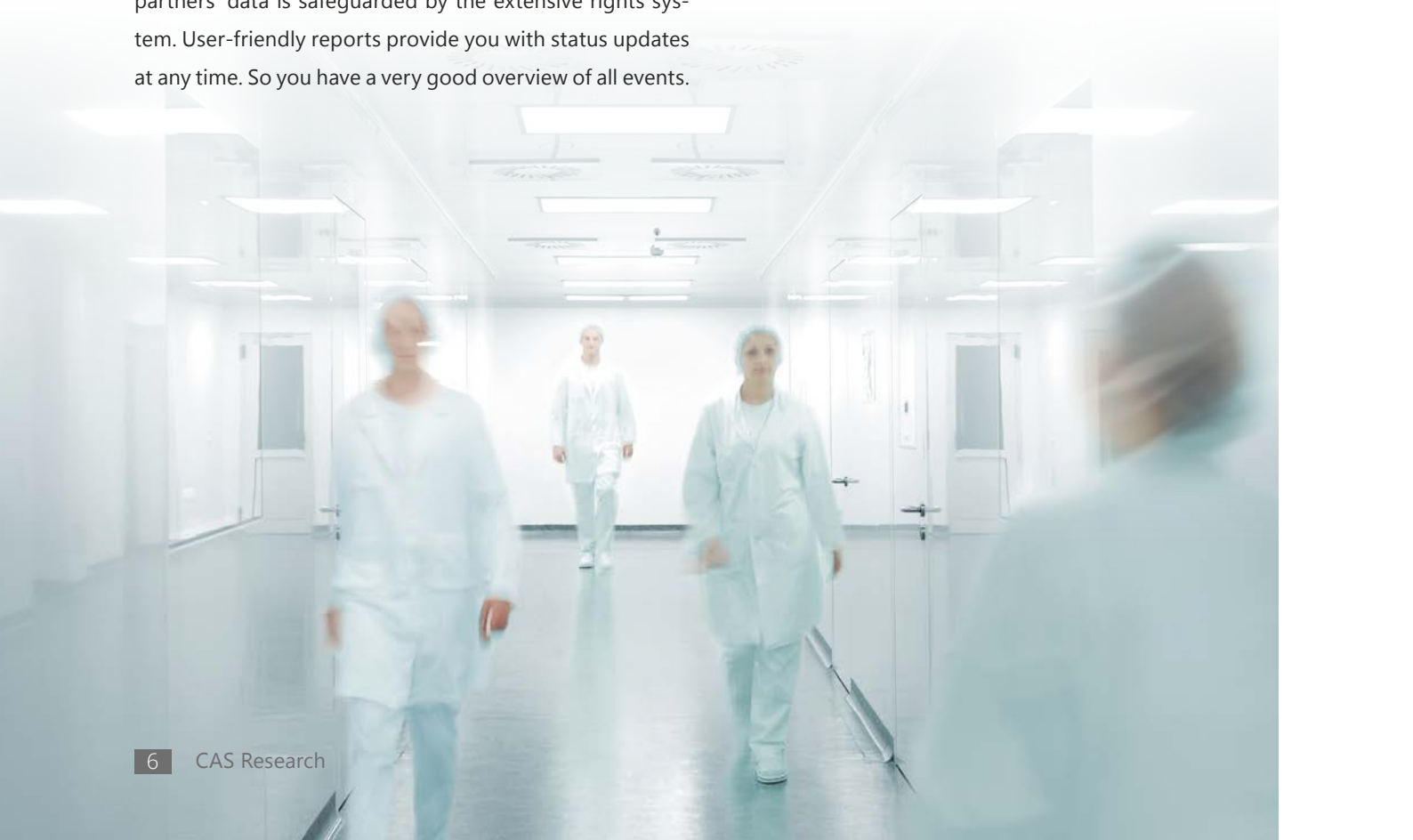
# Efficient event organization and targeted acquisition

## Professional event management impresses partners

With CAS Research events are planned quickly and implemented in a targeted way. The software supports your event planning, from setting the date, through sending out invitations, administering bookings, attendee lists, name badges, facility and resources planning, to follow-up. When sending out invitations, sophisticated search and filter criteria identify the right contacts. Based on the centralized address database, you can select the right partners and invite them by the appropriate channel of communication according to their preferred contact method: by e-mail, letter or phone. Numerous templates are available for personalized mass mailing. Your partners will feel personally addressed, resulting in higher efficacy of your campaigns and minimizing wastage. The confidential handling of partners' data is safeguarded by the extensive rights system. User-friendly reports provide you with status updates at any time. So you have a very good overview of all events.

## Acquire research and development projects in a targeted way

The basis for successful acquisition is knowing your target group very well. With CAS Research all partner-related information is contained in the partner dossier. That information is key to offering the right research and development projects, and assembling the right know-how in the project team following successful partner acquisition. The complete acquisition process is made transparent, efficient, and successful.



CAS Software AG – market leader

with 30 years CRM experience

CAS Research 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-research](http://www.cas-crm.com/products/cas-research)



## 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



» With CAS Research, our inter-departmental collaboration is much more effective and the elimination of routine tasks means our project teams have more time for their research work. «

**Marta Carapuço**

PhD, CEDOC Manager

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# Contact



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