

Success Story



CAS  **genesisWorld**

CRM/XRM for small and
medium-sized enterprises



A delicious interplay

Egger Getränke specializes in beer and non-alcoholic beverages and is one of the leading suppliers in Austria. The great variety includes more than 400 different products. The strategic business areas are strong brands, contract filling and private labels. Egger's brand strategy focuses on their customers and consumers by developing and pushing innovative and commercially attractive products. The company decided on the implementation of a CRM solution to replace existing isolated solutions containing data with unstructured and personally created Excel information. With the introduction of CAS genesisWorld, it was possible to record and store data well-structured and the teams can now centrally manage sales information and customer contacts.

Well prepared for customer visits

Thanks to the new CRM solution, employees have now a comprehensive overview about all activities related to the customer. And the added value remains in the company when an employee is on holidays, sick or leaves the company. Automated sales processes save the field sales staff significant time and effort: A new visit report is automatically assigned to all upcoming appointments within the next two days. The visit report is prefilled with all relevant information based on the current appointment data.



» With CAS genesisWorld, we were able to provide our sales team with our vision from the use of a CRM solution in short time. «

Günther Piller, Project Manager Organization/IT



Industry

Food and consumer goods

Objectives/Requirements

- Contact data management
- Appointment and task management with status monitoring
- Analysis, rights system including the creation of own roles
- Outlook integration, appointment synchronization
- Mobile working online/offline for the sales field staff
- Integration into the ERP software Dynamics AX

Benefits and advantages

- Workflows and sales activities are significantly improved through automated processes; appointments, visit reports, quote generation and evaluations are accessible while being on the road
- Added value remains in the company by saving company knowledge daily and chronologically
- Customer centricity thanks to a 360° view on all activities and data related to the customers including ERP information
- Rapid acceptance by employees due to simple handling, high availability, and high user capacity
- Solid decision base thanks to comprehensive activity management including status control and analyses (reports)



Displaying and managing quotes

Shared access to authorized data enables employees to integrate defined processes in their day-to-day business. Easy handling, high availability and high user capacity are ensured. Even while at the customer's site, sales employees can create a quote in no time using the corporate quote templates. Furthermore, a unidirectional connection of Dynamics AX to CRM makes it possible to exchange data within trade organization structures, and product items can be listed in the system. A 360° view on the data allows to manage all contacts at any time to ensure best customer experiences.



Find out more

CAS genesisWorld

Project data

- CAS genesisWorld Premium
- Module: Report, Duplicate Finder pro, Form & Database Designer, CAS Web configurator
- ERP integration (Dynamics AX)

Customer

- Egger Getränke GmbH & Co OG
www.eggergetraenke.at
- Family-run company specialized on beer and non-alcoholic beverages
- Among the leading Austrian suppliers
- The strategic business areas are strong brands, contract filling and private labels.
- Founded in 1675, 250 employees, 27 export countries

CAS genesisWorld

- Professional customer management
- Supports internal processes, increases efficiency
- Specially designed for the requirements of SMEs
- 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 30,000 companies



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