



CAS IT Services

CRM for the IT Sector

Long-term success through excellent customer service

Whether you are an IT service provider or a software vendor, satisfied customers are the key to long-term success. Excellent service, seamless project implementation and optimal customer care are the main success factors. And you can achieve all this with a CRM solution that is specifically designed with these objectives in mind and that enables your employees to carry out their customer management activities more efficiently and effectively.



The complete solution for the IT sector

The industry solution, CAS IT Services, is specifically designed for IT companies. It has an array of sophisticated features that provide interdepartmental support for employees: from customer acquisition and care, project management, technical support through to software marketing.

CAS IT Services is based on CAS genesisWorld, the multiple award-winning CRM solution for small and medium-sized enterprises.

What can you achieve with CAS IT Services?

Stay well informed about your customers at all times

- Instant access to up-to-date address data
- A comprehensive customer dossier providing a detailed 360° view of your customer's data
- Precisely targeted marketing campaigns
- Make the most of your sales opportunities and leads

Interdepartmental teamwork

- Coordinate appointments and manage tasks effortlessly
- Standardized correspondence and central data storage
- Instant overview of all key information

Manage projects efficiently

- Structured project planning and management
- The latest project status is transparent at all times
- Project management accounting with variance analysis

Fast, reliable service

- Support with the processing of service requests
- Simple management and billing of service contracts
- Less pressure on the hotline
- Full control of costs

Remain focused on your customers

CAS IT Services puts the spotlight on your customers. Instant access to all key information enables you to instantly identify and effectively meet your clients' requirements. The customer dossier gives you a 360° view of all relevant information. CAS IT Services thus supports all communication and interaction: with individual customers, target groups or project partners.

Well-implemented projects and expert service

CAS IT Services enables you to stay in full control of your projects at all times: from the efficient planning of resources, successful project implementation with time and cost recording capabilities, through to management accounting. This solution allows you to quickly and efficiently record, process and systematically forward customer requests. Your customers will feel well looked after and will have confidence in your products and services. Structured processes across your entire company will motivate your employees and enable them to work more efficiently.

Gained through years of experience: CAS Software's expertise

As an IT company ourselves we have years of experience in sales, project management, customer service and marketing. This, together with our commitment to providing excellent customer care, has enabled us to develop a sophisticated state-of-the-art CRM solution that is specifically tailored for IT service providers and vendors.

"CAS IT Services has enabled us to become more service oriented and streamline our business processes, which in turn has reduced our outgoings and made us more competitive."

Markus Hengstenberg,
Managing director, partner
and co-founder of oraise GmbH



How can CAS IT Services benefit you?

- Simple and efficient processes
- Direct communication and smooth collaboration within your company
- Shared knowledge and increased transparency through direct access to data
- Well-informed and motivated employees
- Fast professional service
- Satisfied, loyal customers
- Efficiently plan, manage and optimize your projects
- Full control of costs
- Effective targeted marketing
- Structured sales process with turnover forecast
- Long-term success of your company

Find out more about CAS IT Services:
New benchmarks in customer management,
sales and marketing →



Make your entire company customer oriented

New and improved address management

The foundation for successfully communicating with your customers: up-to-date address data available at all times. CAS IT Services makes maintaining addresses that much easier. You can enter addresses by simply dragging and dropping, check at the touch of a button whether the information is correct and whether it already exists (duplicate check), and compare the addresses with the latest reference databases. Furthermore, you can customize the address mask to meet your needs.

A 360° view with the customer dossier

At the heart of each customer contact: The customer dossier available gives users instant access to all information on a customer: all appointments, tasks, call notes, service contracts, correspondence, sales opportunities, support requests, bills and projects – all information sorted chronologically and in a structured manner.

Seamless, effective teamwork

Interdepartmental collaboration: With CAS IT Services all data is stored centrally and can be accessed by all employees. This makes it easier for them to coordinate appointments, manage tasks, process documents, manage projects, and resolve support issues. Your employees will always have access to the latest information, allowing them to always make well-informed decisions, and will notice a considerable lightening of their everyday workload. The result: Your people will enjoy their work more and will have more time to focus on what's really important – your customers.

Customer dashboard – instant view of all key information

Make the most of your sales opportunities and leads

Selling the right way: CAS IT Services provides you and your sales team with the support you need to boost your sales. It enables you to keep track of all your sales opportunities: from initial contact to closure. The automatic notification and action service keeps you informed about events like birthdays of key accounts, changed appointments or escalations. Not only that but you can also create forecasts and reports on sales potential at the touch of a button. All this makes the whole sales process more transparent, efficient and effective.

Access your data from anywhere

Instant access to up-to-date information for all: whether your company has offices in different locations, your employees work from home, or members of your sales team need to access data from their smartphones or laptops while on the road. CAS IT Services gives your people easy access to up-to-date data via replication or Internet access so they are always well informed.

"Using CAS IT Services for sales, consulting and support purposes, together with the integration of an ERP system, creates a pool of data that enables us to provide our customers with the service and support that is precisely tailored to their needs."



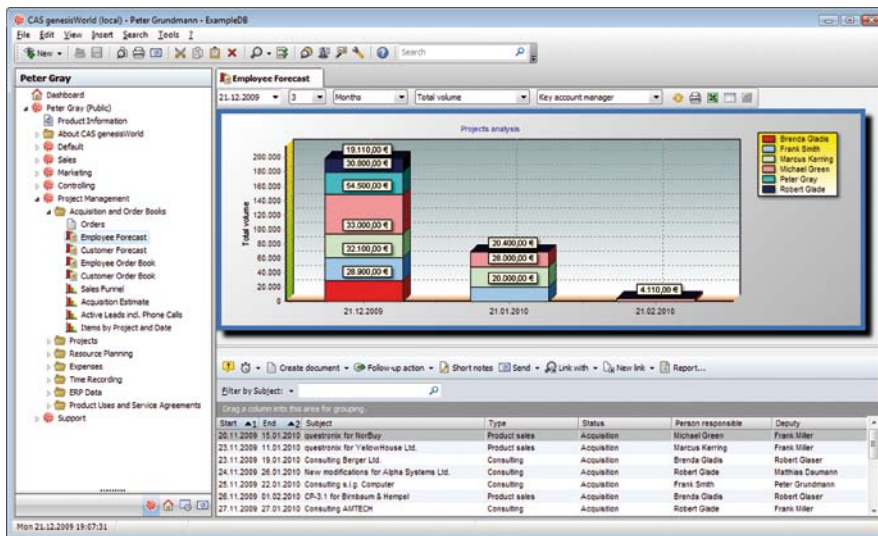
Axel Zimmermann,
Managing director at Audicon GmbH

Precisely targeted marketing campaigns

A precision landing for marketing: CAS IT Services enables you to plan and implement targeted marketing campaigns quickly and effectively. The sophisticated search and filter features help you target the right customers and identify cross-selling potential for your marketing campaigns. When sending out a mailing, the system also lets you know the addressee's permitted or preferred method of contact. With this solution all your customers' responses are automatically stored, and you can forward leads directly to the sales department and generate turnover figures. Furthermore, the convenient analysis feature gives you an instant overview of all your marketing campaigns.

"By deploying this CRM solution, we are now able to manage our numerous customer projects in a far more transparent manner. Managing our projects has become considerably easier, which in turn has increased transparency and streamlined our internal workflows."

Manfred Handschuer,
Project Manager for Information Management
at Fujitsu Siemens Computers GmbH



Satisfy customers in the long term:
through effective project management and professional service →

The sales forecast and order book provide you with a complete picture of the expected and actual sales achieved.

CAS IT Services – a flexible, precisely tailored, complete solution

No matter how large your IT company is, CAS IT Services fits right from the start, and you can expand it as your business grows.

CAS IT Services

- fits any size of company
- is a flexible complete solution that you can use immediately
- integrates various applications into one user interface
- meets the strictest data security requirements

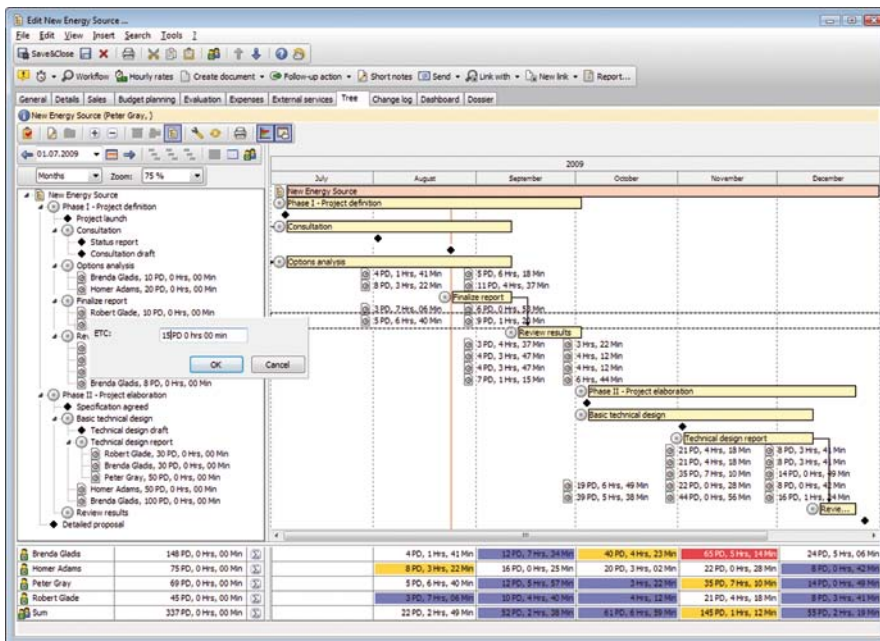
Become more customer oriented



Well-implemented projects and excellent service

Manage projects precisely

CAS IT Service enables you to plan and coordinate your projects effectively, efficiently and precisely, including risks, phases, milestones, objectives, tasks, resources, budgets, costs and working hours, right from the start. The project status, ad-hoc analyses and an early warning system allow you to keep your projects well on track at all times.



The project plan allows you to define milestones and check employee workloads in an instant.

Deploying resources effectively and efficiently

Assigning tasks to the right people: CAS IT Services enables you to plan and deploy your project team's resources effectively and efficiently. The Planner view lets you view your project's resources and expenditure, check your employees' workloads, assign tasks to the right people, and avoid clashing appointments and bottlenecks. You can thus plan your resources effectively and monitor workloads.

Time recording

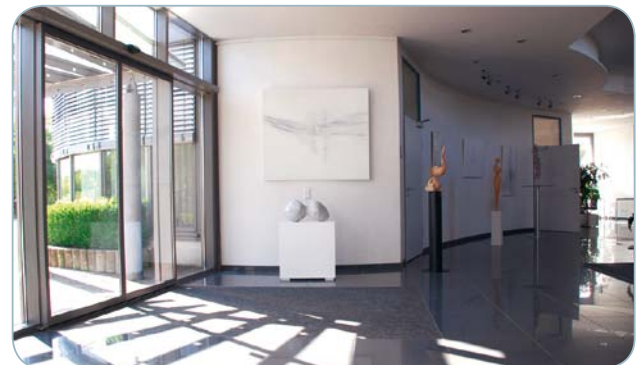
Project management accounting: Assigning working hours to projects is the foundation of effective project management accounting. CAS IT Services has a smart time recording feature – both for customers and for projects – which records, for instance, hourly rates, estimate-to-complete figures, time remaining, budget, and material and external costs.

Analysis ensures full control

Project dashboards give you a clear overview: You can check the current status of your projects, either for one or more projects, as required. Daily status reports are the basis for generating project bills, which you can do so with just a click of your mouse via the ERP add-in. Managing your projects has never been easier.

CAS CRM – the market leader with over 25 years of CRM experience

CAS IT Services is a product of CAS CRM, a SmartCompany of CAS Software AG based in Karlsruhe, Germany. Having over 200 certified partners the company is the leading German CRM provider to small and medium-sized enterprises (SMEs). Its product portfolio includes CRM systems and industry solutions which are used by companies, service providers and organizations to establish successful and sustainable customer relations, to help them make better use of their internal knowledge and improve corporate memory; as well as increase the efficiency of their employees.



Fast, reliable service

The customer can hear a smile over the phone: Thanks to CAS IT Services, your service team has all relevant information at hand, which means that all agents are able to provide customers with expert advice in a professional and friendly manner. Service contracts, service level agreements, response times and contact persons can all be viewed at the click of a mouse. Not to mention how easy it is for service personnel to record, process and assign customer requests.

Highly efficient with Helpdesk

Service requests transparently organized: A trouble-ticket system records error reports, monitors transfers and responsibilities, informs the sales department and allows customers to keep track of their error reports on the Internet. Automatic recording of the processing time and the resources used allow you to remain in full control of your costs. With CAS IT Services, you can generate analyses for departments or individual customers with just a click of your mouse.

Online support and the knowledge database relieve the pressure on the hotline

Efficient use of acquired knowledge: All successfully processed service requests are stored in a central database and can be instantly retrieved using the smart search features. The FAQ database stores all frequently asked questions and answers, which customers can view in their Web clients, along with supplementary information, diagrams and illustrated instructions.

How can CAS IT Services benefit your company?

- Centralized, standardized address management
- Customer management with the customer dossiers and 360° view
- Sophisticated filter and search features
- Systematic dialog with the customer over marketing campaigns
- Consistent sales process with sales opportunities
- Smart phone functions and easy correspondence thanks to centrally managed documents
- Interdepartmental appointment and resource management
- Comprehensive project management with early-warning system and resource planning capabilities
- Record of working hours, expenses and costs for management accounting purposes
- Helpdesk with a system for trouble tickets
- Administration and billing of service and maintenance agreements
- Knowledge database, FAQ and online support
- Management accounting and reporting for improved monitoring of support

For more information visit www.cas-crm.com/IT-Services



More than 200,000 users in 25 countries work with CAS Software AG products on a daily basis. The company has won a number of awards for both its innovative products, and its commitment to the SMEs. The awards include; "Innovator of the year" in 2011 and 2006, "Employer of the year" in 2009 and last, but by no means least; the "Software Made in Germany" quality seal of approval.





www.cas-crm.com

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