



# CAS Consulting

CRM for Consultants

# Impress clients **with your expertise** and effective project management

Satisfied customers are the key to long-term success of your business. Excellent project management and the ability to provide your clients with the best possible advice are the major success factors. You can achieve all this with a CRM solution that is specifically designed to meet these requirements and that enables your employees to carry out their customer and information management activities more efficiently and effectively.

Skilled, well-informed consultants are not only better able to provide clients with expert advice, they also instill confidence in and impress these clients. This in turn reduces costs over the long term.



## What can you achieve with CAS Consulting?

### Be well informed about your clients at all times

- Instant access to up-to-date address data at all times
- A comprehensive dossier containing detailed information about your customer
- Extensive knowledge of the customer increases employee expertise
- Instant access to all customer information wherever and whenever you need it
- Professional competence instills confidence
- Overview of consultation projects
- Precisely targeted marketing campaigns
- Make the most of your sales opportunities and leads

### Manage projects efficiently

- Structured project planning and management
- Current project status remains transparent at all times
- Integrated reporting features including activity reports and project status
- Project management accounting with the help of variance analysis

### Cross-team collaboration

- Easy appointment and task management
- Consistent correspondence
- Centrally stored data and documents
- Instant overview of all important company information and customer projects
- No loss of information should an employee move to a different project team

### Planning security for management

- Comprehensive, easy-to-use management dashboards
- Efficient deployment of resources through effective resource planning
- Key indicators of turnover and consultants' workloads
- Confidence to make a decision thanks to real-time analysis
- Overview of all relevant processes at all levels

## The complete solution for consultancy firms

CAS Consulting is an industry solution designed specifically for consultancy firms. With a range of sophisticated features it enables employees throughout your company to work together efficiently and effectively. Powerful project management tools coupled with centrally stored client information provide your staff with optimal support in all business operations. CAS Consulting is based on CAS genesisWorld, the multiple award-winning, market-leading CRM solution for small and medium-sized enterprises.

## Focusing on your customers

CAS Consulting enables you to stay firmly focused on your clients. Instant access to all key information means you can better identify and effectively meet your clients' requirements. With CAS Consulting, you can also access all data while on the move – the customer dossier provides you with a 360° view of all relevant information. This supports all communication and interaction: with individual clients, selected target groups, partners and of course within your company.

*"All our consultation-relevant processes are mapped using one software tool"*

Dr. Michael Streng,  
Managing director of parameta  
Projektberatung GmbH & Co. KG



## Professional project management for enthusiastic employees and satisfied clients

Your consultation projects will run more smoothly: from the planning and organizing of appointments and resources, to efficient implementation, to analysis-based management accounting. Working hours, expenses and third-party services are recorded and automatically compared with the budget – automatically generated reports provide planning security. Better structured processes throughout your company motivate your employees and enable them to work more efficiently – your customers will in turn have more confidence in your services and will feel well looked after.

### What are the advantages of CAS Consulting?

- Simple and efficient processes
- Direct communication and seamless cooperation between members of your project team and throughout your entire company
- Central access to information provides greater transparency
- Personal access rights ensure confidential data management and no loss of information, even when an individual moves to another team
- Mobile access to data ensures consultants are always well informed
- Motivated employees and satisfied, loyal clients
- Efficiently plan, manage and optimize your projects
- Long-term success of your company

**Find out more about CAS Consulting**  
Excellent customer orientation and seamless project management →

# Excellent customer orientation and seamless project management

## Well informed about the client at all times

An up-to-date pool of address data is the foundation for successfully communicating with your clients. The customer dossier helps you keep track of individual contacts. A quick glance is all you need to find out which projects are currently running and where, and who the project manager is. Appointments, tasks, phone call notes, correspondence, sales opportunities and bills are stored in the customer dossier clearly and chronologically. Individual access rights mean you can control who is allowed to access which information. Your consultants are always well informed whenever they meet with their clients.

Customer	
Company:	NOMOSYS
Company 2:	The Consulting Company
Contact person:	Mr Robert Smith
Street:	212 Tottenham Court Road
Postal code:	W1T 7PT
Location:	London
Type:	Customer
Status:	Service agreement
Person responsible:	Robert Glade
Sector:	Consulting
Phone (mobile):	+44 723 471192121
E-mail (business):	robert.smith@nomosys.uk
Phone (business):	+44 20 7756-110
Homepage:	www.nomosys.uk

Contact data	
First contact:	Personal
First contact date:	24.12.2007
Last contacted on:	07.04.2010 18:00:00
Contact person:	Peter Gray
Last contacted via:	Document

Complaints	
Current tickets:	6
All tickets:	6
Average processing time:	-

Orders	
Current orders:	1
Turnover from current orders:	23.400,00 €
Orders in acquisition (total):	27.517,50 €
Orders in acquisition (submitted):	22.014,00 €

Unpaid items	
Number of unpaid receipts:	1
Total from unpaid receipts:	27.000,00 €

Utilized products	
Database software:	1
ERP software:	0

Contracts	
Service agreements:	1

The clear and easy-to-use customer dashboard provides consultants with an instant overview of all key client information.

## Good teamwork means you have more time to focus on what's really important

With CAS Consulting, all employees have access to one central database. This makes it easier for them to coordinate appointments, manage tasks and documents, and work together on interdepartmental or intercompany projects. Your consultants are always kept up to date and well informed, enabling them to provide a professional service at all times. Their day-to-day work is made easier, which leaves them more time for what's really important – their clients.

## Achieve excellent results with targeted project management

CAS Consulting enables you to plan and manage your consultation projects more precisely and effectively. Risks, phases, milestones, targets, tasks and resources are included right from the start; working hours, expenses and external costs are recorded, which you can then compare with your project budget. The project status, ad-hoc analyses and an early warning system allow you to keep your projects well on track at all times.

## Deploying resources more effectively

Use CAS Consulting to effortlessly and efficiently plan and deploy your project team's resources. The Planner view lets you view your project resources and expenditure, check your employees' workloads, assign tasks to the right people, and avoid clashing appointments and bottlenecks.

*"CAS Consulting has become an indispensable part of our everyday work. It has made our processes more transparent and efficient."*

Johannes Woithon,  
Managing director of  
Consolution GmbH & Co. KG



## Central and secure documentation of projects and storage of all information

Central data storage with CAS Consulting ensures that all project teams have access to all documents and customer information. A sophisticated rights system makes sure that this information can only be accessed by authorized personnel. The transparent storage of data ensures that all employees have an overview of the current project status and enables them to manage all relevant data.

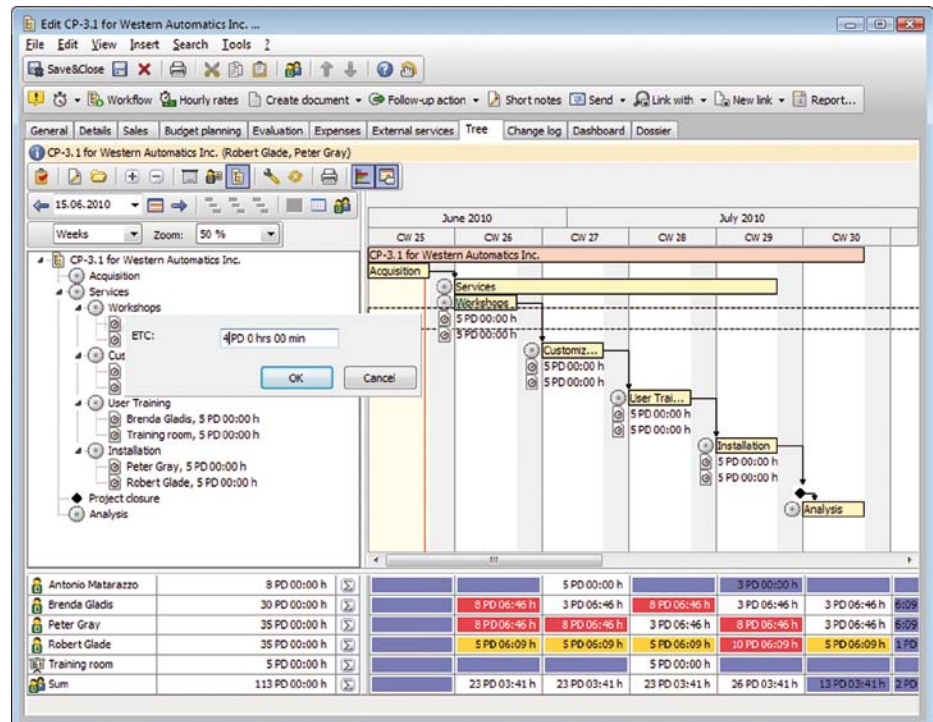
## Stay in control of your project

CAS Consulting enables you to record the working hours, expenses and external costs for each customer and project, even when you are on the move. You can include budget and material costs and enter details of hourly rates and estimate-to-complete figures. Daily status reports keep you regularly informed and ERP-system integration lets you calculate the costs of your project at the touch of a button. Managing your projects has never been easier.

*"Information is your capital in the consulting business. Only a standard company-wide solution can make information usable for our company and ultimately also for our clients."*



Reinhard Frigger,  
CIO & Project Manager at BrainNet Supply  
Management Consultants GmbH



The Project Plan enables you to plan and control your consulting projects more precisely and more effectively.

## CAS Consulting – the precisely tailored, flexible solution

No matter how large your consultancy firm is, CAS Consulting fits right from the start. And you can expand it to as your business grows.

### CAS Consulting

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

## Stay up to date wherever you are with mobile access

No matter whether your employees are visiting customers or working from home, your consultants are using smartphones or laptops while on the move, or your company has a number of subsidiaries – through replication and online access, CAS Consulting ensures that your people have direct access to up-to-date information at all times. Not only can your employees view this information, they can also edit it. All this means that your employees are always kept up to date wherever they may be.

## Impress clients on the long term

Efficient sales and planning security for management →

# Efficient sales and planning security for management

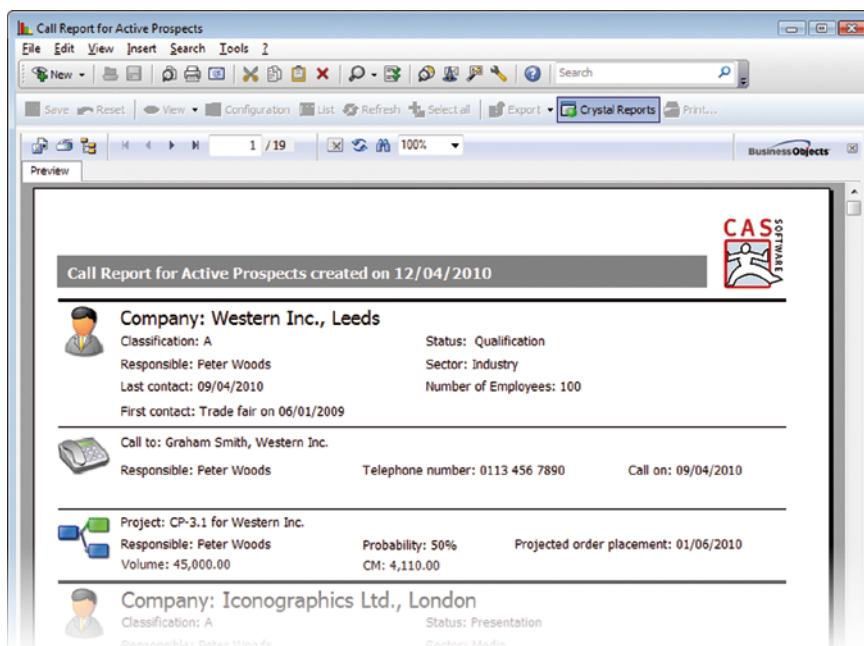
## Make the most of your business opportunities through systematic sales processes

Identifying and taking advantage of your business opportunities is the key to successful sales. CAS Consulting enables you to keep track of your sales opportunities, from the initial contact through to closure, and increases your sales on the long term. The automatic notification and action service keeps you regularly informed about events such as

birthdays or rescheduled appointments. 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.

## Targeted marketing impresses clients

CAS Consulting enables you to plan and implement precisely targeted marketing campaigns quicker and more effectively. When you want to send out invitations to an event, the sophisticated search and filter features enable you to find the right contacts and take into account their permitted or preferred method of contact. Furthermore, the convenient analysis feature gives you an instant overview of all your marketing campaigns.



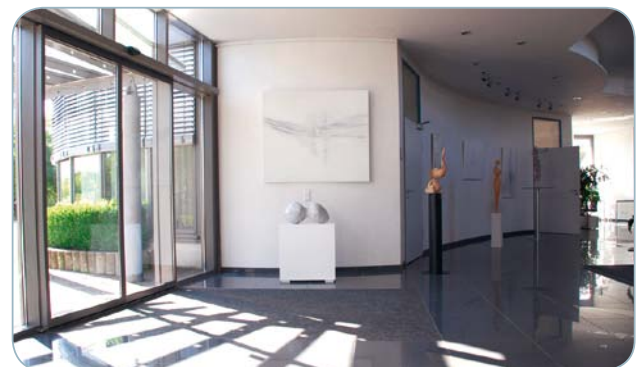
Lead reports enable you to keep track of your sales opportunities – from initial contact to closure

## Increased transparency ensures informed decisions taken at the management level

CAS Consulting's management dashboards give your management team an instant overview of all business processes. These clearly laid-out views display all relevant information from all departments. Daily analyses of customer profitability, cost effectiveness or sales forecasts provide the basis for all decisions. Clear forecasts and automatically

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

CAS Consulting 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.



generated accurate reports provide your management team with a reliable overview. A sophisticated, multi-level rights system ensures that users can only access information they are allowed to view. Your management team has an overview of all success indicators and can take the appropriate measures. Heads of department are given a detailed insight into the areas of responsibility, and consultants have instant access to all relevant client information. All this keeps your company on the road to success.



## How can CAS Consulting benefit your business?

- Central, consistent customer relationship management with up-to-date addresses and dossiers
- Comprehensive project management with structure and resource planning
- Interdepartmental appointment and resource management
- Early-warning system for project management
- Recording of working hours, expenses and costs for management accounting purposes
- Central access to data with a sophisticated rights system
- Mobile access at any time and from anywhere
- Smart phone functions and easy correspondence thanks to centrally managed documents
- Consistent sales process
- Targeted marketing campaigns with systematic customer dialogs
- Sophisticated filter and search features
- Easy and intuitive to use

For more information visit [www.cas-crm.com/Consulting](http://www.cas-crm.com/Consulting)



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](http://www.cas-crm.com)

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