



Success story



Positive change of climate in customer relations

They are to be found almost everywhere – from inside the Arctic Circle through to the world's most remote desert regions: wherever sensitive electronic equipment needs to be protected against hostile climatic conditions, products from INTERTEC-Hess are deployed. To improve the flow of information in its international sales operations and enhance collaboration between office and field, the company, based in Neustadt on the river Danube, has opted for the CAS genesisWorld CRM software package in combination with the CAS teamWorks Intranet solution.

More than half a million INTERTEC protection systems are installed all over the world. As a supplier of field instrumentation and systems to protect sensitive equipment against extreme weather conditions, INTERTEC-Hess is a global player in a niche market. Whether for analyzers, mobile communications and radar equipment, signaling systems or transmitters – the company's innovative protective housings, hoods and shelters ensure that all installations keep running smoothly round the clock.

Optimization of internal communications structures

This global leader's success is founded not just on the many patents protecting its unique know-how. The close interlinking of its sales, engineering and production operations, as well as the interchange between its head office in Germany, its field sales teams and its branch offices in Belgium, Canada, the UK, the Netherlands and the USA are also key factors. The primary aim in implementing a CRM solution back in 2004 was to enhance internal communications between sales and back-office operations, especially in project business, and to establish a single unified, professional database of all transactions relating to one customer or project companywide. "It was important to us from the very beginning that all information on individual sales projects and business contacts should be available at the click of a button," explains Richard Wimmer, IT Manager at the company's head office in Neustadt.

CRM for the office and field sales teams

Today, CAS genesisWorld provides the company with a centralized address management system consolidating all customer and project related information across all the various offices in a single system. The program is currently accessed by 60 employees from all divisions of the company in six different countries, in both language versions German and English. Field sales staff, for example, can use CAS genesisWorld to enter and update customers' addresses and contact persons, file visit reports and schedule customer appointments. They are able to regularly synchronize updated details on their laptops with the central database, ensuring that sales staff at the office also have direct access to the latest information.

A perfect team: CRM and intranet deliver synergies

Before CAS genesisWorld was implemented, business processes in the German sales operation were managed using its predecessor, the teamWorks Classic solution. But project management at the international branch offices was still handled by a manual system based on Excel worksheets. "Since we were very happy with the predecessor software, it was only logical for us to want to roll out the successor product

At a glance

Sector

Manufacturing companies

Objectives/Requirements

- Improved monitoring of international projects
- Centralized system for storing and administering all information on individual sales projects and business contact persons
- Development of internal communications between sales and back-office functions, particularly on an international level
- Scheduling and task management, with deadline monitoring and vacation planning
- Deployment in the various locations in each country
- Multilingual capability

Advantages

- Company-wide access to a shared database
- Bundling of all customer and project information in a central data pool
- Corporate knowledge is accessible to all staff – key information is distributed where it needs to be
- Cross-border cooperation enabled thanks to rapid access to all information
- Time saving in day-to-day activities
- Close interlinking of sales and production to improve customer relations still further

CAS genesisWorld
CAS teamWorks



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„From the very beginning it was important for us that all information on individual sales projects and contact persons should be available at the click of a button.“



Richard Wimmer,
IT Manager of INTERTEC-Hess

company-wide," reports Richard Wimmer. To run alongside the internal information management system, INTERTEC-Hess also opted for the CAS teamWorks Intranet/Extranet solution. The CRM and the corporate portal have been operating in combination since 2004. The system delivers major synergies in day-to-day operations. Employees who do not need the full CRM functionality in their daily work but still want access to a diary application, for example, can use the intranet to access the same data as the CRM system. This means corporate knowledge is rapidly available to an even wider network of employees, and important information is distributed where it needs to be. IT Manager Wimmer, who is responsible for running the system, is highly delighted with the cooperation and support provided by CAS partner talonec crm solutions GmbH, who implemented the complete solution: "We have the confidence of strong, reliable backup."

Enhanced international cooperation

Since the CRM and Intranet Groupware package has been in operation, major improvements have been seen on international projects in particular. The project and customer dossiers have proved especially advantageous. In earlier times, a whole raft of filing cabinets and folders would have been needed to hold all the information now held in a single system. That ensures staff has rapid access to information, which in turn enhances international cooperation and helps maintain close monitoring of projects. One of the most popular features benefiting employees' day-to-day communications – for sales staff in particular – is the telephony integration provided by CAS genesisWorld, which means that instead of having to key in a number when they want to call someone all they have to do is click on the phone icon and the number of the contact person is automatically dialed. This saves time, and is a real user-friendly boost in a highly pressured business environment. All incoming callers' numbers are displayed on-screen, and notes can be taken during the call and then automatically linked to the contact concerned in the customer dossier. Another highly user-friendly feature is the integration with the Tobit David communications system: e-mails and faxes are routed via the Tobit Infocenter, and from there all messages can be archived to the customer file in CAS genesisWorld. INTERTEC-Hess also chose to implement the Tera Hierarchical Categories client extension for CAS genesisWorld from Karlsruhe-based TeraSystems GmbH, which provides even more enhanced management of categories and clarity of structuring. Another add-on module is Speedlink, which aids cross-linking of address data and projects and visualizes them directly in the linked data record.



Intertec protection systems
are installed worldwide.

New interface planned

Today, temperature control specialist INTERTEC-Hess treats its customer relations with the same care and attention as the electronic equipment it protects, thanks to the combination of CAS genesisWorld and CAS teamWorks. In future, the plan is to link the CRM system with the company's existing ERP system bäurer b2. "The integration is already in an advanced stage of development, in fact the address synchronization functionality has already been implemented," reports Richard Wimmer. He concludes: "We hope that it will provide an even more efficient interlinking of our sales and production operations, and most especially that it will continue the positive change of climate in our customer relations."

Project Data

- In use since 2004
- CAS genesisWorld on 60 workstations, CAS teamWorks on 20 workstations
- Combined deployment of CRM Groupware CAS genesisWorld and the Intranet/Extranet solution CAS teamWorks
- Interlinking of offices in six countries via terminal servers and field sales laptop replication
- German and English language versions in use
- Interface to Tobit David from Tobit Software
- Interface to bäurer b2 ERP system

Customer

INTERTEC-Hess GmbH, Neustadt/Donau, Germany
www.intertec.info

- Founded 1965
- Global leader in manufacturing of protection systems for sensitive equipment
- Over 200 employees in Germany, Belgium, Canada, UK, Netherlands and the USA
- Worldwide 2,300 m² of office area, 8,000 m² of production area and 32,000 m² of outdoor area
- 20 patented products and solutions are a sign of INTERTEC's extensive know-how

Project Partner

talonec crm solutions GmbH, Kraillingen, Germany
www.talonec.com

CAS genesisWorld

- Professional customer management
- Supports internal processes, raises efficiency
- Especially for the needs of SMEs
- Very good price-performance ratio
- Flexible, integrable, extendable
- Established product with several awards
- Over 110 CRM specialists provide on-site support
- More than 1,900 corporate customers

Interested?

We are more than happy to provide you with advice and information about CRM for manufacturing companies.

Call our customer support hotline on ++49-(0)721/9638-188 or e-mail us at CASgenesisWorld@cas.de.

We look forward to hearing from you.