



image source: Fraunhofer IPA

# Success Story



## Developing the future with CRM

How knowledge is managed in a research institute has a key effect on scientific progress. To allow knowledge about projects and project partners at the Fraunhofer Institute for Manufacturing Engineering and Automation to be used transparently by all departments, the institute decided ten years ago to implement a customer relationship management solution, CRM for short. Since then many things have changed.

Finding solutions to organizational and technological challenges, particularly within the production environment of industrial enterprises, is the key focus of the institute's research and development projects. With fourteen departments engaged in the fields of corporate organization, surface engineering and automation, the institute's R&D projects aim to enhance production processes and make products more cost-effective and environmentally friendly.

### From Excel to professionally managing customer contacts

Before CAS genesisWorld, the institute's scientists and employees used Microsoft Excel, Outlook and a Filemaker database – which limited the capacity for effective teamwork. "Instead of isolated information saved on each employee's computer, the CRM solution now means that all data is stored in a central database and can then be accessed by all users, providing a better overview and increased transparency of our many customers and partner contacts in our research and industry projects," explains Dr. Günter Hörcher, responsible for strategy and European relations at the Fraunhofer IPA.

### Transparency is there for all to see

Today – over ten years later – more than 100 employees use CAS genesisWorld, and one of the institute's larger departments also uses the industry solution CAS Research. The first benefits to be seen were in address management: "On average, we send out 60,000 letters a year," says Hörcher. "CAS genesisWorld has allowed us to halve the number of undeliverables. This example shows that not only does CAS genesisWorld make economic sense, but it also improves our public image and raises our level of professionalism." On this solid platform, the CRM solution supports the employees during marketing campaigns and the acquisition process.

### Simplifying business processes

CAS genesisWorld simplifies business processes significantly: "CAS genesisWorld ensures effective cooperation with research partners and industrial clients and CAS Research simplifies the handling of projects through effective time and budget management," explains Günter Hörcher. "Compared to an institute without CRM, the cost of targeted marketed campaigns is significantly less, while the acquisition

### At a glance

#### Sector

Research and development

#### Objectives and requirements

- Transparent acquisition process
- Consistent pool of data that can accessed by all users
- Flexible, customizable solution
- Good analysis options
- Transparent and cross-departmental knowledge about partners and projects
- Improved, targeted customer care and support

#### Uses and benefits

- Overview and transparency for projects and contacts
- Improved quality of customer care and support
- Effective address management
- Cost-effective marketing campaigns
- Extensive project analysis capabilities
- Configurable, flexible CRM system
- Simplified business processes within the whole research institute
- Improved project handling through time and budget management

**CAS genesisWorld**  
**CAS Research**



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*"CAS genesisWorld not only makes economic sense but also improves our public image and raises our level of professionalism."*

Dr. Günter Hörcher,  
head of strategy and European  
relations at the Fraunhofer IPA



#### Project data

- CAS genesisWorld deployed since 1999
- Over 100 employees use CAS genesisWorld and CAS Research
- Integration of other departments planned

#### Customer

Fraunhofer Institute for Manufacturing Engineering and Automation IPA, Stuttgart, Germany  
[www.ipa.fraunhofer.de](http://www.ipa.fraunhofer.de)

- Founded in 1959
- Part of Fraunhofer Society since 1971
- With over 450 employees, one of the largest institutes in the society

#### Project partner

itdesign GmbH, Tübingen, Germany  
[www.itdesign.de](http://www.itdesign.de)

#### CAS genesisWorld

- Professional customer relationship management
- Supports internal processes, increases efficiency
- Excellent value for money
- Flexible, integratable, extendable
- Established, multiple-award-winning product
- Over 140 CRM specialists provide on-site support
- More than 150,000 users work with CAS Software products

#### CAS Research

- Industry solution tailored especially for research institutes and scientific facilities
- Effective project management
- Acquisition of research and development projects
- Supports event management

#### Interested?

Contact us to find out more about how CRM can benefit your company.

Call our customer support line on  
++49-(0)721/9638-188 or send us an e-mail to  
[CASgenesisWorld@cas.de](mailto:CASgenesisWorld@cas.de).

We look forward to hearing from you!

process has become far more transparent," says Hörcher, about over the long-term benefits. The customers benefit from a customized range of products and services and from a improved care and support.

## Expansion is on the horizon

Towards the end of 2008, three departments in the Fraunhofer technological development group TEG were incorporated into the Fraunhofer IPA. Up until then, the department had been using the CRM system SuperOffice. With the integration of TEG into the IPA, the institute's management decided to use this opportunity to standardize the CRM software used across the whole institute. In the running were the products from CAS Software AG, Sage and SuperOffice.

## CAS Research fulfills key criteria

The CRM solution CAS genesisWorld and industry solution CAS Research, tailor-made for research and development projects, were the only products to meet all the criteria. Functionality, degree of innovation, low cost of customization were all key factors. CAS genesisWorld was chosen because it is easy to configure and use and has excellent analysis capabilities. Once the selection had been made, the implementation phase began: clients were customized using mask editors and additional fields were also created. That was all the customization necessary. The flexibility of CAS genesisWorld means that integrating data is no problem whatsoever: "As a consultancy firm, we provide our customers and users with expert, technical advice on switching to the new CRM solution," explains Christoph Adamczyk from itdesign GmbH, a CAS partner from Tübingen, Germany.

## Transparency leads to economic success

Ten years of using a CRM solution at the Fraunhofer Institute shows that, even in a research institute with complex knowledge structures, a CRM solution can help provide the transparency that is key to ensuring economic success. Hörcher has two pieces of advice for the decision-makers in other research institutes who are planning to deploy a CRM solution: "First, bring all those responsible on board, and second, select a CRM solution that allows you to start off small but then expand as the need arises." If you take this advice, then there will be nothing to stop you successfully implementing a CRM solution in a scientific environment.



The Fraunhofer IPA mainly focuses on finding solutions to technological challenges within the production area of industrial enterprises.