

Success Story

aumüller ■  
auf. zu. mehr.



CAS **genesisWorld**

CRM + AIA® for small and  
medium-sized enterprises



# Open mind: Taking CRM to the next level

Aumüller Aumatic GmbH stands for state-of-the-art window automation. As specialists in smoke and heat ventilation systems their top priority is fire safety. Their products can be used variably, enabling customers to ensure fire safety while also increasing their energy efficiency via controlled natural ventilation. After implementing the CRM solution CAS genesisWorld, Aumüller is taking customer communication to the next level.

Finding and unlocking added value for each individual customer is par for the course for the experts at Aumüller. The forward-looking company from Bavaria offers innovative products, which offer its customers simple, fast and economically sustainable solutions. With the relaunch of the existing CRM solution CAS genesisWorld Aumüller has simplified communication with its customers and has expanded the central information base for excellent service.

## Attractive user interface

Since being deployed in 2012, the CRM solution created an extensive knowledge database containing all the relevant communication and customer interaction information. Regardless of the device format, that is, smartphone, tablet or desktop: After switching to the intuitive SmartDesign® technology, sales functionality has been extended to all end devices with a uniform look and feel.

Together with the CAS partner, aptus IT GmbH, Aumüller tailored the CRM solution precisely to the employees' needs. "It was important to us that our colleagues enjoy working with the software solution. That's why we explicitly asked about their wishes in workshops and listened carefully to their needs," says Kevin Klaschka, Head of IT First Level and CRM Manager at Aumüller.

## aumüller auf. zu. mehr.

### Industry

Smoke and heat extraction systems

### Objectives/Requirements

- Facilitate the work of employees
- Maintain close customer ties and simplify communication
- All data in one program: adhoc response to customer requests
- Optimized interfaces to ERP and DMS
- Ensure the acceptance of the CRM solution by employees
- Provide mobile use

### Benefits and advantages

- Improved information flow in the company via information bundling on one platform and through the synchronization of customer data
- Intelligent enterprise memory with automated reports and metrics widgets
- Continuous efficiency gain and reduced organizational effort thanks to easy follow-up and adaptation of project processes
- Personal and appreciative relationship thanks to professional issue tracking and transparent helpdesk applications for all service issues
- Ease of use, appealing interface, individual apps

### Consistent customizability

As a manufacturing company, Aumüller has to react quickly to changes in the market and expects this flexibility from its software solution: "CAS genesisWorld has once again



convinced us with the diverse customization options and the extensive functions in the new version. We can further develop the CRM solution independently, for example, by implementing our own apps and designing individual cockpits for each employee. And we also don't want to do lose the essential know-how our employees have gained with the solution over the years," says Klaschka.

### Focus on customer communication

Aumüller are proud of their close customer relationships, many long-standing customers and open communication. The CRM solution CAS genesisWorld bundles all the important information about each individual customer so that sales employees can see all the correspondence and the current status of projects at a glance in the individual cockpits. This also brings tangible benefits at trade fairs: Contacts can be created directly in the CRM solution using the business card scanner and a digital trade fair report can then be generated using the iPad. Office staff are informed automatically and can carry out follow-up actions, such as sending out a brochure. By mapping our trade show appearances completely digitally we can save a lot of time and increase transparency for the employees both at the trade show and at our various company locations.

Support requests and tickets are also recorded in the CRM solution at Aumüller. The CAS Helpdesk module and integrated issue tracking allows support requests to be managed efficiently by forwarding them to the responsible employee for further processing.

## CAS genesisWorld

### Project data

- CAS genesisWorld Premium
- Connection ERP system infor COM

### Customer

- Aumüller Aumatic GmbH, [www.aumueller-gmbh.de](http://www.aumueller-gmbh.de)
- Manufacturer of window automation for fire safety with smoke and heat exhaust systems. Increased energy efficiency through controlled natural ventilation.
- Locations in China, England, Germany, Poland and Russia
- Approx. 150 employees, founded in 1972

### Project partner

- aptus IT GmbH, [www.aptus.de](http://www.aptus.de)

### CAS genesisWorld

- Professional customer management
- Supports internal processes, increases efficiency
- Specially designed for the requirements of SMEs
- Mobile CRM solutions with CAS SmartDesign for smartphones, tablets and browsers
- 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



## One place for all information

"With the relaunch, our information flow has also improved significantly. At a glance, team leaders can see evaluations for the week, delivery bills, orders, invoices and open quotations, among other things. This allows them to adjust planning if necessary and follow up with the customer if something is delayed," explains Klaschka.

"The optimization of the aConnect interface module from aptus is another highlight of the new version. The interaction of CRM and ERP works flawlessly and consistently," says Klaschka. Thanks to the interfaces between CAS genesisWorld and the ERP system infor COM as well as the d.3 ECM document management system. The bundled

knowledge from all three solutions is available quickly which is a huge advantage when it comes to providing professional customer consultation on an equal basis.

## Even more digitization in the future

By the end of the year, even more processes will have been digitalized with the subsequent improvements to workflow. For the future, Aumüller can imagine integrating additional languages into CAS genesisWorld in order to better integrate employees at other locations and break down language barriers. Aumüller's current and long-term goals include: easing the burden on employees by saving them time through automation and more efficient processes, inspiring customers with individual solutions and ensuring communication on an equal basis.



» After the relaunch, the CRM solution CAS genesisWorld seems like a new software solution with many new features which inspire our colleagues in sales. «

Kevin Klaschka, Leiter IT First Level and CRM-Manager



More testimonials:  
[www.cas-crm.com/references](http://www.cas-crm.com/references)

Find out more



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