

Success Story



CAS <sup>globe icon</sup> genesisWorld

CRM/XRM for small and medium-sized enterprises



# Paving the way for excited customers

Providing the needed goods at the right time at the right place: that's what the logistics professionals of VTG Project logistics have to offer. The company's Project Logistics team deploys CAS genesisWorld to create transparency and seamless processes that excite their customers.

VTG is Europe's largest private freight wagon rental company and one of the market leaders for logistics services. The Projects Logistics team plans, coordinates, and monitors product transport in the machinery and plant engineering sector. Any mode of transport is covered: sea freight, rail and road transportation, as well as special transports. Besides transport management from plant to destination, VTG Project logistics take care of, i.a., customs clearance and documentation, transport insurance, route surveys, packaging, assembly, and loading supervision on behalf of their customers. The projects are often complex and long-term cyclical.

## Information hub – 360° overview

VTG Project logistics implemented the CAS genesisWorld CRM solution in 2019 to gain the perfect 360° overview of all customer processes and data and standardize their workflows. "One of our most important goals was to promote teamwork and strengthen our customer relationships," explains Sascha Bengel, Head of Western Hemisphere at VTG Project logistics. "We employ 31 people at five locations. And although the teams mesh concerning the content, they have been working with different filing systems and communication channels." What's more: the projects are multi-layered, and the processes are often not recurring. The employees are usually processing different requests from various projects simultaneously. CAS genesisWorld now helps us integrate the decision-making processes and harmonize our workflows.



## Industry

Logistics

## Objectives/Requirements

- Central and consistent platform as an information hub
- 360° overview of processes and data, dissolution of different filing systems
- Strengthening teamwork modes and customer relationships
- Mobile and cross-location access to all data
- Flexibly customizable solution that expands with new requirements

## Benefits and advantages

- Automated, consistent, and transparent processes improve teamwork and ease the delegation issue
- Seamless information flow, more efficiency and time saving during daily cooperation
- Statistics and reports created with one click provide a solid basis for business decisions
- Quick and current overview of work-specific data even for ever-expanding datasets thanks to SmartSearch and customizable dashboards
- Quick archiving



## Digital customer dossier: team transparency

The information that was once only recorded in Excel lists and communicated from one person to the next via phone calls and e-mails is now consistent, and is available to any team member at a glance. Appointments, upcoming tasks, phone notes, correspondence, sales, and claims - all relevant data can be found and linked in the digital customer dossier. Thus, all project and customer data can be accessed with one click and then edited collaboratively from different locations. "Each team member at any of our five locations can view and trace all data," explains Jonas Jäger, responsible for CRM at VTG Project logistics. "That's a huge advantage for the operational business. And in case of holidays or illness, the delegation of tasks works flawlessly." Current requests are still seamlessly processed, no task is left behind, and the customers feel fully attended.

## Flexibly customized to fit customer needs

Jäger is also convinced of the benefits in daily routines: "The dashboard can be customized flexibly. Thereby, the users are not overwhelmed by a large amount of data, but only see the data that is relevant to them." Using the CAS App Designer,

## CAS genesisWorld

### Project data

- CAS genesisWorld Premium
- Modules: Form & Database Designer, Report

### Customer

- VTG Rail Logistics Deutschland GmbH, [www.vtg.de/logistik/](http://www.vtg.de/logistik/) project-logistics
- Custom and multimodal (special) transport solutions for machinery and plant engineering
- Integrated project transport on rails, roads, and water
- Company of VTG Group, the international market leader for freight wagon rentals and rail logistics
- Worldwide branch and agent network
- Founded 1951

### Project partner

- CAS Software AG, [www.cas.de](http://www.cas.de)

### CAS genesisWorld

- Professional customer management
- Supports internal processes, increases efficiency
- Specially designed for the requirements of SMEs
- 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

VTG Project logistics has also created a custom CAS genesisWorld app for managing and documenting visit reports. Using this app, the VTG Project logistics team traces when and if visit reports are necessary, ensures that the reports are recorded as required, and links them to the resulting to-dos.



## Precise analyses thanks to statistics and reports

Reporting is another important issue for VTG Project logistics: you can use CAS genesisWorld to create forecasts and reports on, for example, potential turnover with one click. The entire sales process becomes more transparent and efficient. "On the management level, it is important to see what's happening in the individual sales and project groups. CAS genesisWorld not only enables us to review the current status but also retrieve statistics and forecasts. Thus, the solution provides a solid basis for company decisions," emphasizes Sascha Bengel, Head of Department. In which ways has the customer structure changed? Which sector has gained significance during the last year? Who has the highest closing rate? These are the contents you can quickly and easily analyze using CAS genesisWorld. The different customer requirements are recorded so customer data can be segmented and our customer relationships can be optimized individually.



» Together with the CAS experts and thanks to CAS genesisWorld, we have managed to clear the hurdle of an opened work mode. «

Sascha Bengel, Head of Western Hemisphere

During multiple workshops, the company's CRM team and the CAS experts have worked out the requirements and needs of VTG Project logistics. "Above all, it was about clearing the hurdle of an opened work mode," Bengel explains. Central

questions were: What are the benefits of equal access rights for all? How can we utilize this new-found transparency to better our teamwork? "With the support of CAS Software, we were able to open our eyes and broaden our horizon concerning this essential area."

## Involving employees in the project

For the Head of Department Sascha Bengel and the CRM manager Jonas Jäger, it was especially important to involve their colleagues in the implementation process. "After we decided to implement the CRM solution, we needed to demonstrate and convince our team of the benefits of CRM for their daily routines. For this purpose, the experiences we made during the workshops that illustrated the practical benefits of CAS genesisWorld were very helpful." He particularly emphasizes the close cooperation with the CAS expert team. "We highly appreciate the extensive support and consultation."

"The mutual and open exchange is very important during such projects. We simulate all options with our customers and try their ideas to best customize our software to fit the company's needs," emphasize Lea Matuschka and Sascha Heger of CAS

## SmartDesign – the next-level interface

We are currently switching from the desktop client to the web client. Thereby, our processes become even more mobile and modern, for example, enabling home or mobile work via smartphone, tablet, or laptop.

Jonas Jäger states that being open to change is one of the most important findings they gained from the implementation: "It's not about moving existing processes into a new tool but questioning them."



» With the CAS genesisWorld CRM solution, we have paved the way for a transparent and team-based work mode. «

Jonas Jäger, responsible for CRM



VTG Project logistics offers complete transport management from plant to destination, including transportation studies, route surveys, packaging, assembly services, and customs clearance.

## Our Conclusion:

„During the implementation of the CRM solution, it was important for us to involve our employees, define the ideal processes together with our team, and then model them in the new system. The open exchange with the CAS expert team was very helpful," summarizes Jonas Jäger, responsible for CRM.

"In the near future, we also want to optimize our purchasing process with the CRM solution," explains Sascha Bengel. „Furthermore, we are currently working on a cross-location dashboard for our sales management. Thus, we enable the employees to remain consistent in their work and customer interactions. Bengel and Jäger recognize many opportunities in the further development of the CRM solution.“



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

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