Your CRM for effective
project management

Customer Centricity
CERTIFIED

CAS Engineering

A solution tailored to the needs of Engineering companies

CAS
SOFTWARE

Impress customers with effective project management and top-class service

Engineers who handle projects efficiently and impress their customers will safeguard the long-term success of their business. Outstanding project management and top-class customer service are key to success. Success can best be achieved with a CRM solution specially tailored to those demands. This means staff have a view of all customer, project and contact information. That saves time and money, and provides the freedom to focus on what really matters: cost-effective project execution and giving your customers top-class service.

The complete CRM solution for engineers

The CAS Engineering solution combines all the business processes of a consulting engineer with intelligent customer management and sales functionality. Efficient project management and centralized information gathering – on all customers and projects – provide your staff with optimal support. The software provides sophisticated functionality to help staff in acquisition, consulting and project execution. The management has the key information continually in view.

Professional project management for happy staff

CAS Engineering enables you to keep a handle on all your project business: from quoting, schedule and resource planning, through efficient execution, to billing and financial controlling. With CAS Engineering, inquiries are quickly and efficiently recorded, processed, and systematically passed on to the appropriate department. Thanks to the structured processes throughout the company, your staff work more efficiently, are freed from routine tasks, and are more motivated. Your customers have confidence in the services you provide, and appreciate the sense of receiving top-class support.

What are the benefits of CAS Engineering for your business?

- Improved closing rate based on optimal presentation of your competencies
- Higher contribution margins thanks to appropriate quoting
- Higher contribution margins on projects thanks to reduced need for corrections
- Increased business volumes based on utilization of your knowledge base
- Shorter project runtimes thanks to efficient processes
- Greater customer satisfaction

Always well informed about the customer

- Access to up-to-date address data at all times
- Complete customer dossier with all details for a 360° view
- Target group-specific mailing list and successful marketing campaigns
- Full utilization of sales opportunities and potential
- Efficient handling of service and support inquiries via the helpdesk

Management planning certainty

- Optimum capacity utilization thanks to clear resource planning
- Overview of your engineers' competencies
- Staff capacity utilization data
- Decision-making certainty based on real-time reports
- Overview of all project operations

Inter-departmental and cross-company collaboration

- Simple schedule coordination and efficient task management
- Unified correspondence and centralized document filing/archiving
- Quick overview of all key information
- Transparency in relation to contacts and current project status
- Management of all project partners

Nominal/actual comparisons keep projects on course and form the basis for ever more accurate costing and future quoting.
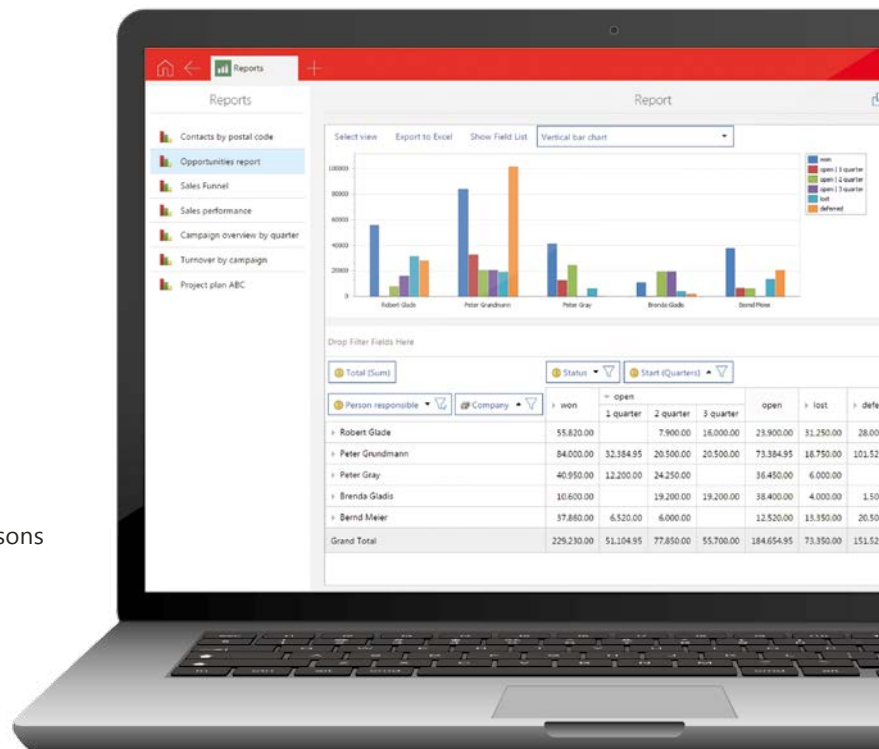
Efficient project planning, management and costing

- Structured project planning and management
- Mapping of routinely recurring workflows
- Integrated reporting with proof of project completion and project status
- Project controlling with nominal/actual comparisons
- Complete project dossier for full documentation
- Correct billing of services rendered

Close orientation to customers' needs and efficient project management

## Plan and manage projects in a targeted way

Plan and manage your contracts assuredly and effectively with CAS Engineering. Project phases, milestones, risks, goals, tasks and resources are incorporated right from the beginning. You keep your projects on course at all times based on the project status and an integrated early-warning system. The profitability of completed projects can be reviewed based on evaluation reports – the basis for even more accurate calculation and future quoting.

Effective resource planning for optimum capacity utilization

CAS Engineering makes it easy for your project team to plan resources. The planning view enables tasks to be assigned in a targeted way. The graphical view allows you to monitor your staff capacity utilization, and avoid scheduling collisions and bottlenecks. In this way you can plan your resources effectively and manage your capacity utilization optimally.

» CAS Engineering has resulted in significantly improved transparency for our field service and we now have a comprehensive view of customers, salespersons and branch offices." «

Uwe Buhmann, Regional Sales Manager, Hohner Maschinenbau GmbH
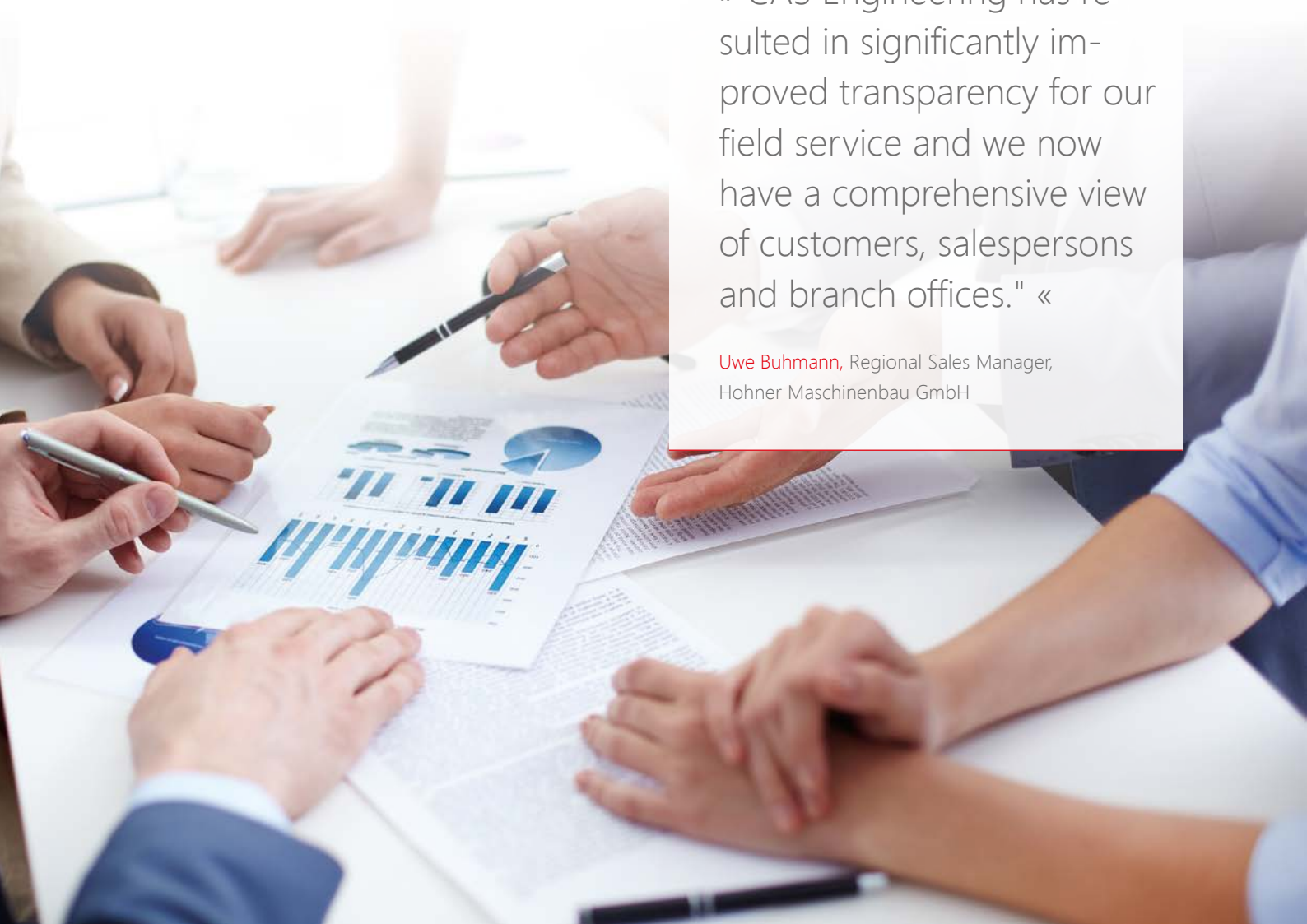
Bill promptly based on cost accounting

CAS Engineering ensures project and customer-specific recording of times, expenses and external costs – including when on the road. Including budget and material costs, even residual expenses and valuations are calculated at hourly rates. Concise reports indicate current status. Daily updated status reports means projects can be billed quickly and easily – via an ERP interface or using the Easy Invoice module even at the press of a button. Your project management is made transparent, and you are able to bill your services promptly.

## Good teamwork makes time to focus on what really matters

With CAS Engineering, staff can access all centralized data. That transparency enables inter-departmental, cross-company team working, even when project team composition changes. Schedule coordination, task assignment and joint project working are optimally supported. All staff have an overview of project content and the current project status. They can be sure of providing expert advice, and are greatly aided in their day-to-day work.

Keep up-to-date at all times with mobile access

Whether your staff are working at the customer's site or in their home office, are using their smartphone or laptop, or the business is spread across multiple locations: CAS Engineering ensures direct online access to continually updated and synchronized data. The data can be viewed and edited as required. That means staff are always up-to-date, whether while in the office or on customer visits.

Fully informed about the customer

The basis for successful customer communications is up-to-date address data. CAS Engineering automates your address maintenance based on user-friendly features. The customer dossier provides comprehensive information on individual contacts. Staff can see at a glance what projects are currently in progress where, and which colleagues are working on them. Personalized access rights ensure confidential cooperation and compliance with data protection requirements.
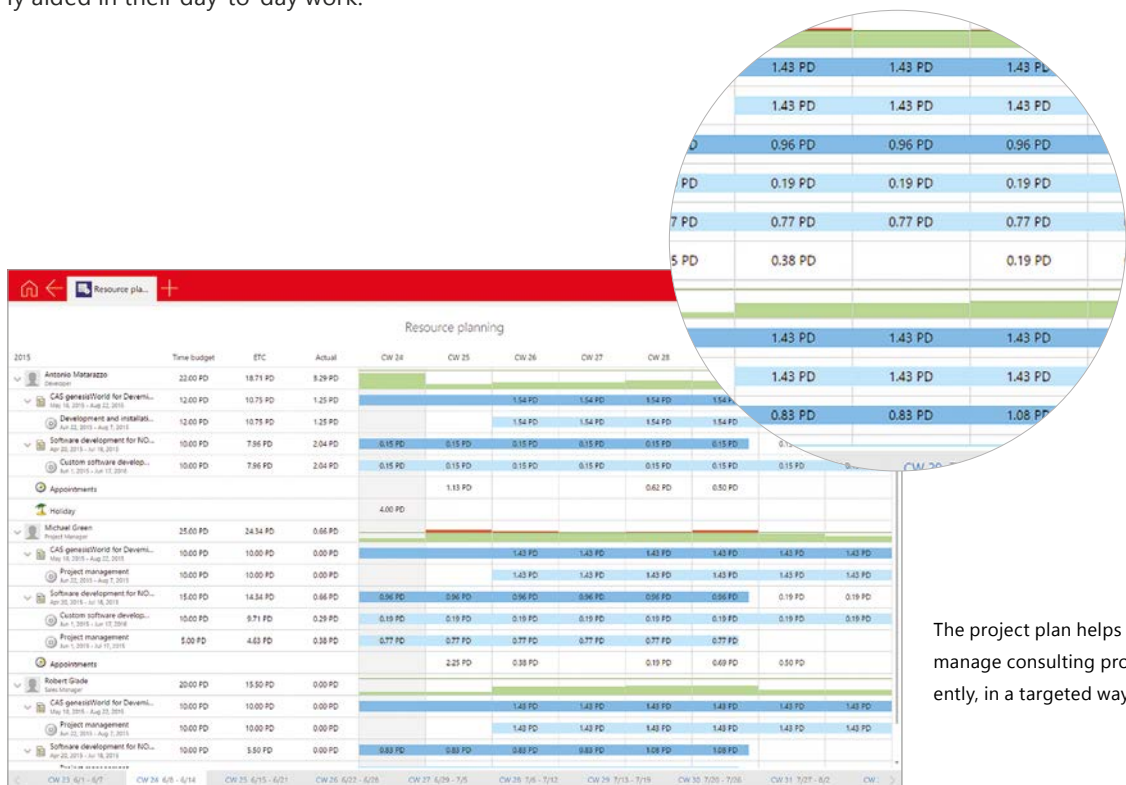
The project plan helps plan and manage consulting projects efficiently, in a targeted way.

Top-class service and management planning certainty

Fast, competent service

With CAS Engineering, you have access to comprehensive customer information, including their service contracts and what products they are using. Service staff have an immediate overview of specific agreements, including service levels, response times, and selected contacts. They are able to record and process inquiries efficiently, or systematically pass them on to the relevant department.

Helpdesk maximizes efficiency

Service inquiries are organized simply and transparently: A trouble ticket system records error reports, helps manage handovers and competencies, notifies project management, and enables customers to track their inquiries online. Automated recording of processing times and equipment used ensures full cost control.

Transparency aids sound management decision-making

CAS Engineering consolidates all necessary information across departments and companies in clearly laid-out dashboard views. A sophisticated multi-level rights system ensures that all staff see exactly what they need, and are authorized, to see. Daily updated customer-specific revenue reports, profitability reports and sales forecasts form the basis for all management decision-making.

Effectively exploit selling potential and opportunities

The key to successful selling is to identify and exploit all business opportunities. With CAS Engineering, you retain an overview of customer acquisitions from the initial contact through to closing, and are able to boost your selling success in a lasting way. You can draft quotes or process inquiries quickly and easily. With CAS Engineering, you will optimize the creation of specifications for quoting, including quotation management through different versions. The complete sales process is made more transparent, efficient, and successful.

Clearly structured customer dashboards provide consultants with a quick overview of key customer-related information.

CAS Software AG – market leader
with 30 years' CRM experience

CAS Engineering is a product by CAS Mittelstand, a Smart-Company of CAS Software AG. Over 20,000 companies and organizations including global market leaders, such as Daimler, Airbus, Fraunhofer, OKI and many others, employ our solutions and rely on our expertise. We have received several awards in recognition of our innovative product range and our commitment to the SME sector. CAS Software AG is a TOP 100 Innovator, and as Germany's best IT employer has been recognized as one of the country's TOP Employers in 2016. Our software has been awarded the „Software Made in Germany" and „Software Hosted in Germany" seal.

For more information visit

www.cas-crm.com/products/cas-engineering

CAS Software AG

■ Owner-managed business

■ Over 300,000 delighted users in more than 40 countries

■ German market leader in CRM for the SME sector

■ Over 200 certified distributors and solution partners

■ Investment in innovation per year: 22 % of turnover

■ Multi-award winning solutions

» Since launch, every member of staff has saved at least an hour a day on administrative tasks. So they really love their CRM." «

Ilona Hanke, Head of Sales International, Schaefer International

Contact

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Future

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