

Reference

BANS  
BACH



CAS **genesisWorld**

CRM + AIA® for small and  
medium-sized companies





» The implementation of CAS genesisWorld was a conscious company step in the direction of a digital future for: better transparency, more efficient network management and a significantly optimized invitation process. «

Christina Gewohn, Project Lead IT

## BANSBACH

### Industry sector

Auditing, tax consultancy, lawyers

### Requirements

- Standardization of address management and client contact processes across all locations
- Planning, management and controlling of e-mail marketing
- Categorization and target-group formation of the contacts
- A 360-degree view of all client contact points
- Interface to DATEV
- Establish a consistent sales process
- Data protection-compliant storage of data

### Benefits and Advantages

- Easy data maintenance all in one place, thanks to the DATEV interface
- Consistent data quality thanks to the central overview of all the contacts, thus avoiding duplicates
- Saves time and increases the chance of success in e-mail marketing thanks to target-group language and improved analysis
- KPIs and analyses with graphic reporting
- Minimizes the effort involved in the GDPR conform saving and processing of personal data
- Raises efficiency through simplified and clarified processes

## CAS genesisWorld

### Project data

- CRM as a Cloud solution (SaaS)
- Module: Form & Database Designer, Event Management
- Default DATEV interface

### Customer

- BANSBACH GmbH, [www.bansbach-gmbh.de](http://www.bansbach-gmbh.de)
- As an auditor and tax consultant, the internationally active company is a professional contact and advisor in tax and auditing matters as well as a sparring partner, co-thinker and decision-maker in almost all business matters
- Founded in 1924
- 450 Employees

### CAS genesisWorld

- Company-wide, customer-centric platform supported by thinking assistants (AIA®)
- Professional client management optimizes internal processes, increases efficiency
- Interface to DATEV original data with simple synchronization for consistent data
- Secure your customer data and privacy by deploying software "Made & Hosted in Germany"
- Established product – multiple award-winning
- Over 200 CRM experts provide on-site support
- CAS products are successfully deployed at more than 30,000 companies worldwide.

## Contact and Consulting



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