EVI and TINA: CRM 4.0 for the Energy Sector





From CRM to a Platform for All Business Areas

Prerequisite for ongoing business success is an uncompromising alignment with the wishes and needs of customers. Energy suppliers must work continuously on improving their own processes and customer relations to ensure that customers are happy and the business is achieving good results. What's needed here is a good CRM (Customer Relationship Management) software.

All value creation processes of the company begin with the customer and therefore in CRM, as that is where all business processes begin. In the end, added efficiency and transparency will benefit the supplier as well as the customer.

The opening of the energy market prompted CURSOR to develop the two industry solutions 'EVI' and 'TINA' in collaboration with numerous ESCs (energy supply companies). Today, more than 100 of these ESCs trust in the experience and industry knowledge of CURSOR Software AG for their CRM software and related consulting needs.

EVI[®] TINA[®]

EVI is the leading CRM solution for sales, marketing and service in the energy industry (market role 'supplier').

TINA is the platform for grid-specific business processes of distribution, transmission grid and transmission system operators.

EVI and TINA will allow you to optimize your business processes, while at the same time improving speed, quality and operating efficiency. EVI and TINA are perfectly aligned with the needs of the energy sector, offer optimal support for day-to-day business operations and allow a customized layout and implementation of business processes: From customer service to quote and contract management, all the way to the statutorily compliant mapping of legal requirements.

At our current stage in the fourth industrial revolution, the term 'relationship management' barely does the many tasks of CRM justice. Today, the idea centers around interconnecting the various and highly flexible functions of the CRM system with existing IT systems to create continuous processes. That is where CURSOR comes into play: **We offer one platform for all business areas.**

The four-dimensional platform offers tried and tested business processes, connects IT systems and supports the automation of individual, as well as batch processes. The platform is rounded off with an innovative, industry-specific network that will benefit you and your company.

We hope you will enjoy reading this service overview.

Take your first step into a new dimension with us!

Sincerely, your CURSOR Management Team

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Why CURSOR?

SOFTWARE THAT WILL THRILL YOU





FLEXIBILITY

Is your company or your market changing? Not a problem – our CRM solutions easily adapt to any new situation.

INTEGRATION

We will integrate your existing third-party systems so that you can have a central platform for all your work and communication.



DATA SECURITY

Data centers located in Germany and a multi-level security concept ensure superlative data security – also in the cloud.



FUTURE VIABILITY

The very latest 3C technology and ongoing further development guarantee that our CRM systems will remain viable in the future.

FIRST-CLASS CONSULTING SERVICES



CRM EXPERIENCE

As one of the pioneers in the field of CRM, we can look back on 30 years of software know-how and consulting experience.



INDUSTRY EXPERTISE

You will benefit from the expertise of our energy and grid management experts.



SINGLE SOURCE We will be your single source for CRM software, consulting, implementation, training and support.



CERTIFIED QUALITY

Various certificates for software and consulting certify the quality of our services.

Factors for Success in the Energy Sector

The energy market is becoming increasingly dynamic and competition is fierce in the business and private customer sector. Aside from their traditional task of providing power and gas, energy supply companies will have to offer their customers added value. More competition also means that customers tend to expect more, resulting in an increasingly complex product portfolio for ESCs to manage.

TAKING CONTROL OF DYNAMICS AND COM-PLEXITY

Taking control of that growing complexity is therefore a very important task. EVI and TINA offer your employees an intuitive, user-friendly GUI. Each user can customize the CRM cockpit to suit their needs. Jürgen Heidak, Consulting Director:

"Our objective is to offer companies tools like the 'cockpit', which allows a complete overview of all customer data at a glance." Customers can then receive the requested services quickly and at a high quality: Requested information, documentation, quotes, contract adjustments and much more. Current and past transactions are transparent and traceable. A holiday replacement will have all the information at their fingertips and there will be no need to put customers off. And last but not least, EVI and TINA allow the immediate handling of complaints, which means that many issues can be resolved right away.

TURBO DRIVE FOR BUSINESS PROCESSES

The ever changing market requires ESCs to continuously improve their processes. EVI and TINA have become veritable turbo drives for business processes.



"The CRM solution has become a core component of our operational and workflow organization. EVI has allowed us to implement a holistic approach for our business management."

Paul Weis, Managing Director LuxEnergie S.A.

One CRM for All Business Areas in Sales and Grid

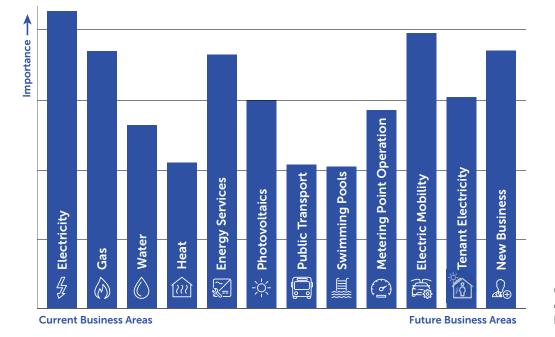
EVI and TINA users praise the great flexibility of the CRM software. This flexibility allows the mapping and interconnection of current and future business areas of the ESC. A consistent use of CRM in all business areas offers the most benefits.

The margins for current business areas like power and gas are decreasing. New and innovative products are needed to guarantee income in the future. High customer orientation and professional customer management with the right tools are essential prerequisites.

The high flexibility of EVI and TINA will have you perfectly prepared for all current and future business areas. EVI and TINA interlink your business areas (power, gas, water, district heating, EDL/ contracting, private and public transport, metering point operation, electro mobility, waste disposal, telecommunication...). The CRM solutions adapt to your specific requirements and changing market conditions to guarantee future viability.







CRM interlinks current and future business areas

CRM 4.0: A Step into New Dimensions

What does the CRM of the future look like? As a pioneer for CRM in the energy sector, CURSOR offers 'CRM 4.0' – a four-dimensional platform.

The basis and first dimension of your CRM system are your **business processes** in the traditional CRM areas of sales, marketing and service. EVI and TINA are used here for multichannel communication.

The second dimension transforms your CRM into a platform. Third-party applications along the operational process chain are seamlessly connected via **integrations**. The result is a centralized operations and information platform. Cross-system **process automation** using the integrated Business Process Management (BPM) engine represents the third dimension. Consistent process optimization efforts not only save time and money, they also improve quality.

The extensive CURSOR **network** is therefore the fourth platform dimension. Various options for further professional development, networking and cross-sector exchange are offered here. In the CURSOR community, you as the customer are a deciding factor in the design of the ongoing solution development.

The following pages offer more detailed information about the individual dimensions.



Smart Business Processes for All Customer Groups

EVI and TINA will help you to complete your daily tasks and business processes quickly and error free. The CRM systems are your perfect solution for the support of all customer groups.

EVI AND TINA ARE A PERFECT FIT

- These solutions were designed specifically for the requirements of the energy sector. They help to save time and money and increase acceptance among your employees.
- The solutions can be introduced at a budgetable cost.

EVI AND TINA RAISE THE BAR

Browser-based and equipped with an innovative data model, these CRM solutions raise the bar in terms of function and technology. Virtually limitless scalability and integration flexibility mean that the solution can be adapted perfectly to the dynamic requirements of your industry sector and to the development of your company.





"Its easy and user-friendly handling makes EVI an essential tool for our digital customer support."

Mike Frank Managing Director meistro ENERGIE GmbH

Raise Your Score in the Private Customer Segment

ESCs gain efficiency via digital business processes that are standardized and automated. What is needed here is a CRM solution that will automate sales and customer processes for SLP customers. To that end, EVI and TINA contain tools for BPM (Business Process Management). Business experts model the business processes in BPM, which can then be used quickly and easily by the users.

Steffen Homrighausen, Project Manager Private Customer Processes at CURSOR Software AG, explains: "We provide a specialist cockpit in EVI and TINA that simplifies workflows for the customer support team. Each team member will have all the information at hand in this cockpit that will be needed to place a quote successfully. When a customer, for example, calls the support hotline of the ESC, then the support representative is shown a dialog window in the CRM software that will allow them to offer professional and knowledgeable support for the relevant customer. A direct comparison of the own quote with competitor products will allow the representative to make an acceptable offer in every sense of the word. At the same time, the representative will have an opportunity for cross-selling offers as well."

BPM AS A TURBO DRIVE FOR YOUR BUSINESS PROCESSES

EVI and TINA offer tried and tested procedures for private customer processes. Moving house, quote creation, meter registration, anticipated payment adjustment, tariff management, termination or customer recovery – every single process is basically provided as 'ready to proceed'. Additionally, all process steps can be fine-tuned individually for any company.

ovag Energie AG manages over 200,000 customers in Germany's Central and Upper Hesse region. Holger Ruppel, Head of Energy Supply Sales and authorized signatory for the company, has been working with EVI for many years:

"The BPM model has become the turbo drive for our business processes. We were able to improve all our routine tasks and can now create new customers in the system or process meter registrations almost entirely without additional manual work of our staff."

> Holger Ruppel, Sales Director ovag Energie AG



Success in the Business Customer Segment

Customer Acquisition Queries + Quotes

Contract Management Customer Care Customer Recovery

Energy management is undergoing dynamic change. Driven by tough competition and the energy revolution, a need for exploring new business models has become apparent. The margins are decreasing and cost pressure is on the rise – new products must be developed and marketed successfully.

THAT MEANS TWO CORE REQUIREMENTS FOR CRM:

- 1. The mapping of energy-specific, out of the box' standard processes
- 2. Superior flexibility to implement new require ments quickly and with reasonable effort.

The utility company Stadtwerke Giessen AG (SWG) has been working successfully with EVI in the business customer segment since 2014. Its main advantage here is the transparency of the visualized RLM quote process. Human error and processing times are significantly reduced. Thomas Wagner, Head of Sales Industry and Business Customers sees a particular advantage in the high flexibility of the software. In his opinion, this flexibility allows very quick responses to spontaneous market developments:

"EVI allows us to act faster and more flexible in terms of adjustments in the system and the operative quote processes."

Süwag Vertrieb AG & Co. KG in Frankfurt-Höchst has been working with EVI since 2017 and appreciates the fact that it supports the digitalization efforts in the company. EVI is used as a basis for allowing the B2B business activities to culminate in CRM activities in an automated format. The standardized work processes and a simplified data entry result in a current and comprehensive dataset. That information is then used as a basis for analyses and contributes to a systematic improvement of the quote.



"EVI has allowed us to reach new levels in B2B customer management, which optimally supports the sales team in their acquisition efforts."

Thomas Fösel, authorized signatory and Head of B2B Sales Süwag Vertrieb AG & Co. KG

Quick Quotes – Transparent Contracts

EVI and TINA offer a centralized operations platform for the entire quote and contract management. Automation and workflow tools will allow you to create faultless, perfectly calculated quotes in no time. That means a definite plus in terms of quality and safety.

PERFECT COMMUNICATION FOR QUALITY AND COMPETITIVE ADVANTAGES:

- Requests are answered immediately.
- Quotes are created in record time with a targeted follow-up – order probabilities and order numbers increase.
- Email, internet, fax, letter, phone the complete integration of all communication channels ensures around the clock information and communication.
- Key information is available to your staff with full transparency.

USE CASE CONTRACTING

The contracting specialist LuxEnergie S.A. expedites maintenance workflows for large and small plants. With automated, preconfigured workflows in customer and lead management, document management and in the creation of quotes (incl. calculations) and contracts.

All processes are controlled and monitored in EVI during the planning and construction phase of the plant, the mapping of the construction file, service contracts and finally for operations and maintenance. Paul Weis, Managing Director:

"The CRM solution EVI ensures fast quote creation and transparent contract situations in our marketoriented contracting."

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Your personnel is guided step by step through the process.

Digitalization of Customer Processes in the Grid

Grid operators are facing huge challenges. Supply security on the on hand, the energy revolution on the other – and everything must fulfill statutory requirements in a competitive energy market, where margins are dwindling at such a rate that responsibles are becoming increasingly worried.

What is needed here is a high-performance IT solution to efficiently support customer management processes. That is why distribution, transmission grid and transmission system operators trust in the process management solution TINA.

The application spectrum for TINA is broad. TINA comes into play as soon as a new customer is introduced into the process chain:

- From the digitalization of the house connection process
- to feeder management and
- the Smart Meter rollout,
- centralized customer support management
- and the digitalization of the entire service spectrum.

TINA is highly flexible and can map numerous grid operator processes. In effect, TINA becomes a data hub for the company, providing employees with a modern, ergonomic and standardized operating platform. These qualities ensure high acceptance among users – a prerequisite for successful business process optimization.

At Amprion GmbH, TINA ensures transparency across all locations. Andreas Hinni, Head of Services:

"We really appreciate the comprehensive options for customizing TINA to match our requirements."

Energienetze Mittelrhein GmbH ϑ Co. KG (enm) also relies on TINA for the optimization of their business processes. Uwe Worch, Head of IT:

"After our very positive experiences working with the CURSOR CRM solution EVI at our parent company, evm was able to achieve greater efficiency and service orientation with its sister product TINA."

"TINA allows us to overcome the constantly increasing requirements in the energy market. There is simply nothing TINA can't do or we can't implement."

Thomas Zogbaum, Ralf-Gerwald Dölle, Denis Vattes, Fanny Förster Energieversorgung Halle Netz GmbH



Expand Your CRM

The standard versions of EVI and TINA are comprehensive CRM systems for a broad spectrum of business areas. CURSOR's CRM solutions can be expanded at any time to suit your requirements. All add-ons can be adapted to your specific needs.



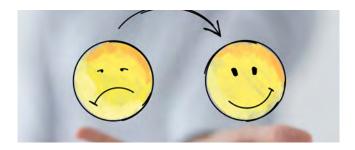
ANALYTICS

The knowledge of how a customer reacts to specific offers, market decisions or company-internal campaigns is essential for the optimization of your sales department. The CURSOR-Analytics module allows you to analyze the collected customer data and derive target-oriented measures.



CURSOR-APP

The CURSOR-App gives you anytime access to your CURSOR CRM solution. Optimized for tablet PCs and smartphones, the CURSOR-App features easy hand-ling and a state-of-the-art encryption via web services. The offline mode allows access to your CRM even without an internet connection.



B.BETTER BY CURSOR

The complaints management solution b.better is based on a concept that has proven successful over the course of many years. This concept takes into consideration all relevant task elements and the target system on which an active complaints management is based. It contains all capture and processing content relevant for complaints management.



CURSOR-BPM

CURSOR-BPM allows the visualization and handling of processes in the CRM system and in synergy with other systems. The spectrum of options includes the automation of standard workflows in daily operations on the one end, and the mapping of complex workflows across area, system and company borders on the other.



CRM PORTAL

Connect your customers directly to the CRM system via the CURSOR-CRM-Portal. You can then benefit from the excellent availability and low process costs for portal solutions. Your customers will be able to access all relevant end customer processes directly in the portal. The solution fits seamlessly into the processes and the corporate design of your company.



INXMAIL

Effective email marketing: Targeted and successful. Customers and leads are becoming increasingly selective and should only be addressed in a way that matches their individual requirements. Email newsletter integrations allow such a targeted address of the customer. The integration of INXMAIL has proven to be particularly helpful – a successful software Made in Germany.



MULTICHANNEL MARKETING

Successful marketing campaigns reach the target group at the right time and place and find a solution for consumer wishes. CURSOR-Multichannel-Marketing allows you to organize your marketing campaigns in a way that is structured, cross-medial and transparent. Visualizations of the process phases ensure a quick overview.



GEOANALYSIS

CURSOR-Geoanalysis offers answers for everyday questions in the areas of geomarketing and geosales. This optional add-on to the CURSOR-CRM, EVI and TINA standard versions visualizes all selected data on a virtual map. Here, items can be selected and processed directly.



CUSTOMER SERVICE

The Customer Service module is a tool for the integration of ticket or complaints management in your CRM system. It allows a quick and simple capture and handling of customer complaints. Now you can convert crises into opportunities to reinforce customer loyalty with excellent service.



PRIVATE CUSTOMER PROCESSES

SLP customers look for comprehensive support, high flexibility and low prices. ESCs must therefore keep their calculations as tight as possible and map all required processes with as much automation as possible to submit successful quotes. CURSOR offers standard processes for your private customer segment that were developed jointly by customers and energy experts.

Your CRM as an Integration Platform

YOUR CRM PROJECT CAN ONLY BE SUCCESSFUL ALONGSIDE AUTOMATED INTEGRATIONS

Almost all information is available digitally today. Some of that data, however, is stored in individual applications. Sourcing information from these 'data silos' usually occurs manually and is therefore tedious and error-prone.

In practice, this insular arrangement often results in doing without current and correct information procurement due to the high effort involved. Decisions are then made based on half-knowledge or approximate values. CRM projects frequently fail simply because interface points either don't exist or they aren't automated. That is not acceptable – and it doesn't have to be.

EVI and TINA offer centralized integration platforms. Data from third-party systems is seamlessly integrated and is therefore available at a glance. Processes run smoothly, quality increases and you save time and money.





"The CURSOR integration environment now serves all popular ERP and consumption accounting systems in the energy management sector. A new highlight is the SAP-certified web service online integration, which seamlessly connects EVI & TINA with SAP IS-U."

Markus Keil, Team Leader IT Consulting & Academy, CURSOR Software AG

EVI AND TINA INTEGRATE YOUR EXISTING IT **ENVIRONMENT PERFECTLY INTO PROCESSES:**

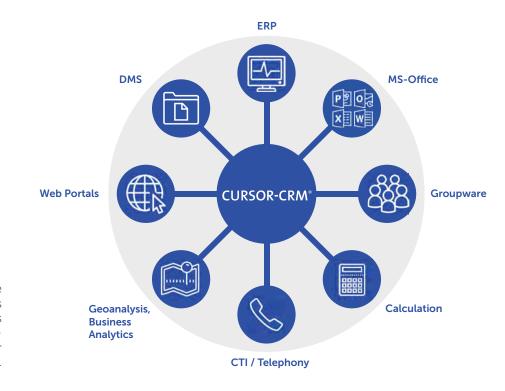
- ERP, e.g. SAP (IS-U, SD, R/3, PM); Wilken (CS/2, ENER:GY); rhenag (LIMA); iS Software (WinEV); SIV (kVASy); Somentec (XAP); Schleupen (Schleupen.CS)
- MS-Office (Excel, Outlook, Word, ...)
- Groupware, e.g. Microsoft (Outlook); IBM (Lotus Notes); Novell (Groupwise); Google (Gmail)
- Calculation, e.g. KISTERS (BelVis, AnKa-fix, PREMO); ENERKO (EnSupply); robotron (ecount); soptim (VIS); Klafka & Hinz (FirstSale); PSI (Merkur, PSImarket); ifesca (ifesca.AIVA)
- Telephone switchboards
- Coupling with CTI telephone switchboard via 'Clarity Communication Connector'
- GIS, e.g. INFOGRAPH (GIS Mobil); **INTERGRAPH** (Interstrom)
- Online portals, e.g. ITC (Power Commerce); IFS (EDX-D); SOAP
- DMS, e.g. EASY (EASY Archiv); IXOS/OPEN TEXT
- EDM, e.g. Siemens (Sat-Prophet); KISTERS (BelVis); PSI (Merkur); robotron (*ecount); Klafka & Hinz (FirstNET); soptim (NEM, NZM)

SAP WEBSERVICE ONLINE INTEGRATION

The Webservice Online Integration by CURSOR is a flexibly scalable interface point. It connects the CRM solution EVI with IS-U. This digital service allows the exchange of data in realtime. The module can be installed by CURSOR at a low cost. On SAP side, only transport orders are needed. The functionality is event-dependent, meaning that e.g. after a new creation or change to a business partner, the Webservice Online Integration communicates the updated dataset via RFC or webservice between EVI and SAP. The CURSOR module creates data consistency across both systems by way of immediate data synchronization.



Powered by SAP NetWeaver



EVI and TINA integrate your existing IT systems to create a homogeneous information and communication platform in your company.

Automation Saves Time and Money

EFFICIENT PROCESS MANAGEMENT WITH THE PROCESS AUTOMATION PLATFORM

The visualization and implementation of business processes is at the heart of Business Process Management (BPM). BPM allows the automation of business processes. That saves time, reduces costs and increases quality.

This quality increase is achieved by guiding users through each step of the process. Even the most complex processes are simplified significantly and errors are prevented.

NO LIMITS FOR PROCESS DESIGN

The freedom you have in process design is virtually limitless. Customer as well as business processes can be digitalized quickly and easily. The spectrum of options includes the automation of standard workflows in daily operations (e.g. the interactive creation of a quote for a private or business customer) on the one side, and process mapping beyond system, area and company limits on the other.





"BPM ensures efficiency, transparency, speed and flexibility. For the bottom line that means, for example, lower production costs, faster work results, happy employees and customers."

Stefan-Markus Eschner, CTO CURSOR Software AG



"Our quotes and contracts are complex and customized. EVI allows us to automate individual process steps and entire processes effectively."

Dr. Roland Blaschek Head of Energy Price & Process Management Stadtwerke Düsseldorf AG

YOUR ADVANTAGES WITH CURSOR-BPM

- Easy and intuitive visualization of business processes
- Employees are guided through the process step by step
- Optimization and automation of business processes
- ✓ Clear responsibilities
- ✓ BPM ensures efficiency, speed and flexibility
- Higher process quality based on crossdepartmental transparency

- Visualization of KPIs for all processes
 - Valuable resource savings
 - / Problem analysis and prevention
 - A well-founded basis of current data for decisions (instead of 'guesstimates')
 - Increased agility for faster responses to market conditions
 - Greater employee satisfaction due to improved teamwork

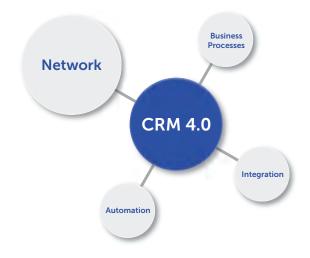
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The process overview in CURSOR-BPM displays all information about the selected process at a glance for easy and quick navigation.

Benefit from the CURSOR Community

The CURSOR network represents the fourth platform dimension. Various network components guarantee market-consistent solutions.

The **CURSOR Community** consists of dedicated customers, who support and engage in market-oriented development as our partners. Many of our customers and partnerstake advantage of the innovative work environment to build new functions and modules. The 3C architecture makes these functions and modules available to all community members.





The **CURSOR Academy** offers various options for further professional development, networking and cross-sector exchange. Our experts share their knowledge with future users and administrators. That is how we give our customers the tools they need to utilize our solutions quickly and to customize them as needed. Numerous training courses and seminars on other topics in energy management round off our academy portfolio.



CURSOR Innovation Days – At this event, our customers get the opportunity to communicate with us directly about trending topics and can witness the implementation of our solutions first hand. Current topics like Artificial Intelligence, chatbots, etc. are discussed jointly in qualified workshops and their possible use is analyzed. That is how our customers can influence the future viability of CURSOR products directly. We work with our partners on the timely implementation of processes or modules identified here.

The **CURSOR CRM Congress** is the highlight for the community. More than 200 guests from IT, sales, marketing and customer service attend regularly to exchange their experiences and latest trends, learn about the many attractive new solution add-ons from CURSOR and its partners, and are given a platform for personal networking.

E-world is Europe's largest energy industry fair and is held once a year in Essen. You are cordially invited to our CURSOR Lounge in Hall 3, where you can meet and network with other experts from the energy sector. Experience the latest EVI and TINA versions live and find out about latest CRM trends in the energy sector.

These network components give our customers the assurance that

- they can effect content change with their supplier
- they will always have the latest solutions on the market
- product optimization will always be worked on in a joint effort
- they can further develop their own specialist knowledge







On the Road to Success with CURSOR (Selection)



SOFTWARE THAT WILL THRILL YOU AND FIRST-CLASS CONSULTING SERVICES

We offer a comprehensive service spectrum from a single source, which includes software development, consulting, software implementation, training and support.

OUR CORE COMPETENCES:

- Energy (sales and grid)
- Service sector, facility management
- Financing

Other industry solutions – e.g. for associations, industry, tourism and healthcare – are offered by our certified sales ϑ implementation partners.

TOGETHER. THRILLING. THRIVING.

The CURSOR motto says it all: CRM is much more than just software to us.

We develop the perfect CRM solution **together** with our customers to address their specific needs. We live and breathe CRM and want nothing less than to **thrill** you with our CRM software and services Made in Germany. CURSOR has been synonymous for **thriving** customer and business process management for over 30 years.





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CURSOR Software AG

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