

## Fullscope helps Travel Counsellors move to the cloud

*A shift from on-premises CRM to Dynamics 365 enables growth and boosts customer service*

travel counsellors



Travel Counsellors Ltd is an independent travel company operating in seven countries around the world, with headquarters in Manchester.

It takes its customer satisfaction very seriously, as more than 95 per cent of its customers say they would recommend their Travel Counsellor to their friends and family.

### Move to the cloud to re-engineer business processes

The organisation wanted to move from on-premises Microsoft Dynamics to a cloud-based solution. It hoped the move would help it to re-engineer its business processes to better serve the business growth and service customers in the B2B and B2C markets.

Travel Counsellors considered proposals from Salesforce and Sugar CRM, before selecting Fullscope, an Alithya company, to implement cloud-based Microsoft Dynamics 365. It was one of the first Fullscope customers to go through the new Microsoft Fast Track On-Prem Upgrade Program.

### Outcomes outlined

Fullscope held several meetings with key business units to scope the project and understand the desired business outcomes.

### Top three business outcomes

- Maximise time spent talking with prospective travel counsellors
- Increase lead handling and responsiveness
- Improve forecasting accuracy

### Mobile technology leads to greater agility

One of the immediate benefits of the move to the cloud has been the access to the mobile technology. Enabling the Outlook CRM App saves Travel Counsellors from copying and pasting every interaction they have. Information is now shared and available instantly on any device and data can be analysed far more quickly.

Waseem Haq, Digital Strategy and Innovation Director, says: "We have seen immediate benefit from using the D365 mobile app, which was not available in the on-premises version. We are able to get insights quicker now and pivot and make business changes."

The IT department at Travel Counsellors has also seen benefits from moving to cloud-based Microsoft Dynamics. Rob Snelson, the CTO, explains that "it has freed up resources from improving and supporting the on-premises version and allowed my team re-focus on other projects".

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## Cloud-based CRM is a “growth enabler”

Fullscope has worked with Travel Counsellors to create a 2019 Roadmap to Dynamics 365, which will focus on areas including: LinkedIn Sales Navigator; Event Management; Machine Learning and AI to help identify warm leads/opportunities; and Voice of the Customer for insights through the recruitment process.

The organisation is also producing data insights from CRM and has created a scorecard to start tracking where it is winning and losing. This is visible in Microsoft Dynamics 365 via a PowerBI report.

Nick Latocha, Head of Data and Insight at Travel Counsellors, says: “The business can now make decisions based on factual data. We can now make faster decisions and understand the impact and ROI. We couldn’t have done that without moving to the cloud.”

He adds: “The upgrade has been a growth enabler.”

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### About Fullscope

Fullscope, an Alithya company, delivers innovative Microsoft ERP, CRM and BI solutions and services to companies in North America and the UK. The award-winning company is one of the largest resellers of Microsoft Dynamics 365 (formerly Dynamics AX and CRM). We also offer strategic consulting delivering a blend of classic and product-based consulting services that help clients reduce costs, improve processes and increase revenue through the judicious use of technology. We continually fine-tune our process and user-adoption programs to give you the maximum return on your investment. This commitment to stay with you throughout your Dynamics 365 journey has earned us the highest customer retention rate in the business.