

CASE STUDY

TRAVEL COUNSELLORS Hospitality

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Waseem Haq, Digital Innovation Director



Travel Counsellors Ltd is an independent travel company with its headquarters in

Manchester. It has more than 1,800 travel counsellors who operate in seven countries around the world.

One of its most important business strategies is to recruit more travel counsellors and it felt that its on-premises CRM platform was not helping to achieve this. Waseem Haq, Digital Innovation Director at Travel Counsellors, says, “It wasn’t really optimised, properly nurturing those candidates to get them across the line and get them to join us.”

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

Business Outcomes

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

These were to:

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

Was says: “As we planned this project, I think we felt we knew exactly what we needed to do. It wasn’t until Alithya came on board that we talked about the major outcomes we wanted and how we would then organise the project to deliver those outcomes as quickly as possible.”

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

Waseem explains: "We went through a selection process and felt Dynamics was the right platform, but we weren't in the right version. We weren't in the cloud and weren't really using all the functionality and features that were available to us."

Rob Snelson, Chief Technology Officer at Travel Counsellors, agrees. He says, "Rolling out Dynamics in the cloud means that we can concentrate on the things that we want to concentrate on, our own technologies, our own platform, whilst allowing Microsoft to support us in the areas around that. But also, it means that we can integrate it into our core systems and core applications that are also based on Microsoft products."

Empowered to run the project internally

Travel Counsellors was very keen for capability to be built internally so that it could manage the CRM project itself. Alithya's unique methodology enabled the organisation to discover how best to implement Dynamics 365 to meet its desired outcomes.

Was explains: "Alithya were very much aligned to our values. They came, they worked with us, they built the knowledge in our teams, they built the knowledge with our product manager, who knew CRM but wasn't necessarily an expert in the project management side of it. They really helped us empower a team internally to run the project as opposed to just doing it all for us."

This methodology ensured that the implementation process was smooth and successful.

Nick Latocha, Head of Data and Insight, says: "From the initial business value meetings to the actual migration and how we can improve our current process, Alithya helped us make sure we were doing things according to best practice and using that expertise to make the implementation as smooth as possible."

Mobile technology leads to greater agility

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

Was 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 explains, "It has freed up resources from improving and supporting the on-premises version and allowed my team re-focus on other projects".

Nick explains: "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. The upgrade has been a growth enabler."

This growth looks set to continue thanks to Alithya and Dynamics 365.

Cloud-based CRM is a “growth enabler”

Alithya 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.

Nick says, “Our migration to CRM Online is giving us the right foundations to unlock the value-add features that Azure offers businesses. Whether it’s LinkedIn integration or AI, the cloud allows more rapid deployment of these capabilities through test, learn and optimise.”

The organisation is also producing data insights into what the CRM solution is telling them and has produced a scorecard to start tracking where it is winning and losing. This is visible via a PowerBI report.

Hannah Wilkinson, Business Process Owner and Recruitment Executive at Travel Counsellors, says, “Our whole aim is to recruit more travel counsellors and get our brand out there. We couldn’t have done that as quickly as we have done without Alithya. I don’t think it is a case of there is an end point, I think it will just continuously improve, which I love.”

Rob adds, “We are fiercely passionate about being in the cloud with services like Dynamics because it gives us a business advantage.

“When I think about what the future holds, how could I feel anything other than excited?”

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– Waseem Haq

FULLSCOPE BECAME PART OF THE ALITHYA GROUP IN NOVEMBER OF 2018. Alithya is a leading strategy and digital technology company with over 2,000 highly skilled professionals delivering solutions across Canada, the US and Europe. Alithya’s Microsoft practice covers a wide array of capabilities including Dynamics, Azure, business analytics, digital solutions, advanced analytics, application development and architecture. Focused on business outcomes, our combined companies have delivered Microsoft ERP, CRM, BI and digital solutions to over 1,200 clients. Alithya’s global offering is to deliver strategy and digital technology services.

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