

Global Travel Management Company ATPi Improves Visibility of Data Globally with Microsoft Dynamics CRM



Background

ATPi is among the world's leading travel management companies. Its dynamic and innovative approach to savings and service has earned ATPi one of the highest client retention rates in the industry. ATPi has a worldwide office network, solving customer travel challenges in-house.

ATPi's vision was to have one global database so the senior management teams had full visibility on all global prospects and client data in one central place

At initial discussions it was clear that the CRM solution needed to manage two operating brands within the business. The system would then need to evolve and develop further to cover all ATPi's operating brands (totalling 5). This would enable ATPi to cross sell between the other operating brands.

ATPi had previously used 2 databases. The Belgium and Netherlands personnel used an in-house developed database (which integrated with their back office system), and all other locations used GoldMine.

The Solution

Microsoft Dynamics CRM

ATPi's goal was to have a central CRM, which could be used by its global Sales & Account Management personnel, at anytime, anywhere in the world. The global coverage at the initial introduction stage was to install the software in a couple of countries. This has since expanded to cover 17 countries.

ATPi chose Microsoft Dynamics CRM working with West Yorkshire, UK based CRM consultants, Caltech CRM.

Miljenko Cvijanovic, CIO ATPI, confirms, “Caltech CRM provided full support from initial project discussions through the complex implementation process, rolling out the CRM to approx. 50 users.

During the initial project discussions, they went into great detail to understand how our complex business operates to ensure they provided the ultimate solution for ATPI’s needs. Caltech CRM provided multiple options and solutions at each stage, allowing the project team to analyse in detail and make final decisions.

They were always contactable via telephone or email, and provided immediate assistance whenever it was required.”

Significant Benefits

Where large corporate clients are serviced by ATPI in multiple locations, this provides the sales, account managers and senior management teams with a full view of all relevant data at a servicing location level.

Due to the far spread of global locations, ATPI did experience some areas where capability wasn’t providing full coverage and usage, particularly as ATPI wanted all personnel to use the Outlook integration software to ensure the tracking of all emails, appointments, tasks etc.

The distance between the locations in AsiaPac and the UK (where the hosted server was held) sometimes caused long delays with data being retrieved. So, a Web interface was introduced to those personnel.

“From ATPI’s point of view, Microsoft Dynamics CRM provides full visibility of data globally and in some cases the user experience was improved,” explains Cvijanovic.

Cvijanovic confirmed, “Microsoft Dynamics CRM also provides our Marketing teams with one central place to obtain data for any new product introductions and marketing campaigns.

The CRM is constantly evolving and the Caltech helpdesk provides instant access and support to the administrators whenever their needs arise.”

Cvijanovic explains, “The best thing about the implementation was the full support from Caltech CRM. No matter how busy things were, they were always available to discuss any implications or concerns.”

The introduction of Microsoft Dynamics CRM at ATPI has provided support to all staff and senior management, providing full visibility of activity and information about those prospects and customers. This has also brought the global teams together to provide one true solution to its customers, also ensuring the Global account manager can see what activity has happened at the local level.

The Senior Management team are also now using the Dashboard/Reporting areas to monitor activity and looking at internal KPI’s for personnel.

There are now around 200 global users of Microsoft Dynamics CRM at ATPI.

