



Customer: Travi@ta
Website: www.traviata.be
Customer Size: 30 employees
Country or Region: Belgium
Industry: Professional services—IT services
Partner: Plataan

Customer Profile

Travi@ta, a Microsoft partner with a Gold Customer Relationship Management competency, specializes in consulting, implementations, and support around Microsoft Dynamics CRM for financial-services companies and other businesses.

Software and Services

- Microsoft Dynamics
 - Microsoft Dynamics CRM
- Microsoft Programs and Practices
 - Microsoft Dynamics Sure Step

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Technology Provider Boosts Profitability, Increases Customer Satisfaction by 20 Percent

“With the consistent, structured Sure Step approach to sales, communications, and project delivery, we achieve unprecedented levels of customer satisfaction, close more business at better margins, and enjoy more operational flexibility.”

Claude Verschueren, CEO, Travi@ta

Business Needs

[Travi@ta](http://www.traviata.be), a Microsoft partner with a Gold Customer Relationship Management competency founded in 2003, has its headquarters in Diegem, which is close to Brussels, Belgium. The company’s close to 30 team members focus exclusively on consulting, implementation, training, and support of [Microsoft Dynamics CRM](http://www.microsoft.com/dynamics/crm). Many of Travi@ta’s customers are banks and financial-services organizations. In both 2010 and 2011, Travi@ta was a finalist for the Microsoft Dynamics Financial Services Partner of the Year award.

Travi@ta aims to provide the best value to customers and achieve optimal customer satisfaction. Over time, the company’s consultants and sales team changed from a highly individual approach to more standardized and consistent ways of engaging with customers. Company leadership felt there was more opportunity in this direction. [Claude Verschueren](http://www.traviata.be), CEO of Travi@ta, says, “As we became a more mature organization, we set firm goals for customer satisfaction and the quality of our projects. To help us achieve these

objectives, we started looking for a more streamlined, consistent way of serving customers.”

Travi@ta wanted to accomplish very specific improvements. “First of all, we wanted to make sure that we deliver exactly what customers expect,” says Verschueren. “We felt there was not a close enough alignment between sales and project execution. In their proposals and communications, our sales associates did not always share the details of key aspects of implementation projects, such as timelines, training, or testing. Customers were sometimes disappointed, and we gave them goodwill discounts that cut into our margins.”

In addition, Travi@ta team members found that free consulting services did not always lead to winning new customers’ business. The company wanted to avoid giving away services unproductively. Also, customers often requested and received discounts when they signed contracts, further eroding profitability. Johan Roosen, Senior CRM Consultant at Travi@ta, says, “We



gave away too much upfront and did not achieve the level of customer satisfaction we hoped to achieve. That's when we looked for different approaches to scoping, selling, and delivering our projects based on Microsoft Dynamics CRM."

Solution

Travi@ta learned about the Microsoft Dynamics Sure Step methodology, a set of highly structured, well-documented best practices, resources, and tools that Microsoft provides to Microsoft Dynamics partners. Says Inge de Wit, CRM Project Manager at Travi@ta, "The Sure Step methodology felt like the next logical step in the direction we were already taking. It was exactly the right thing at the same time."

The company soon connected with [Plataan](#), a Microsoft Gold Certified Partner and Microsoft Certified Partner for Learning Solutions also located in Belgium. [Vincent Bellefroid](#), Partner at Plataan, says, "It quickly became clear to us that everybody at Travi@ta was firmly committed to continuous improvement and clear about what the company wanted to achieve. The Sure Step methodology was a great fit for Travi@ta."

After Plataan provided an orientation session about the Sure Step methodology, Travi@ta decided to embrace the practice. The two companies worked together for close to a month in Plataan's Facilitated Adoption Program (FAP) for the Sure Step methodology. After a thorough review of objectives, processes, concerns, and opportunities for improvement at Travi@ta, Plataan took Travi@ta through an in-depth adoption workshop. Then, Travi@ta established an action plan with Plataan's help, documenting changes and accountabilities in sales, consulting, and project delivery.

After the end of the FAP, Travi@ta was ready to make the Sure Step methodology a practical reality throughout its business

activities. Says Verschueren, "As we became familiar with Sure Step, we continued adopting and refining best practices and making process improvements at our own pace. What at first seemed like an almost overwhelming task became a consistent, efficient business practice that all employees supported." Today, customers are aware of Travi@ta's Sure Step approach from the first conversations on. "Customers understand that the Sure Step methodology is our way of working," says Roosen. "They like the transparency and accountability we provide."

Benefits

With more than a year's experience in practicing the Sure Step methodology, Travi@ta achieves outstanding customer satisfaction and generates revenue at better margins. The company continues to refine its adoption of Sure Step to refine software implementation processes and team collaboration. Recently, Travi@ta increased its Sure Step commitment to include the resources for upgrades to Microsoft Dynamics CRM 2011. "Sure Step is a transformational opportunity that enables our entire team to develop more productive ways of working together and with our customers," says Verschueren. "It also accelerates the adoption of Microsoft Dynamics CRM in customer businesses and helps customers realize a higher return on their technology investment."

Achieve Complete Customer Satisfaction

With clear communications, careful expectation setting, and thorough documentation of agreements and project details, Travi@ta fully aligns sales and project delivery. In consequence, the number of satisfied customers has increased by almost 20 percent. Today, regular online and telephone surveys by independent research providers show that 95 percent of the company's customers are delighted with Travi@ta and the relationship they have with the employees

they interact with. Says Verschueren, "The Sure Step methodology helps us ensure that our project delivery perfectly matches customer expectations. In addition, customers better understand what needs to happen at what point in software implementation projects and who is responsible for it. Following our adoption of the Sure Step methodology, all of our customers are satisfied and we can easily resolve the minor issues that still come up."

Generate More Business at Better Margins

By adopting the Sure Step methodology, Travi@ta has gained a better return on its efforts to develop and win new business. Firmly established goals and a shared understanding of software implementation parameters translate into better revenue margins. "We hardly ever provide free consulting anymore, and, in the few cases where we do, the customers do business with us instead of a competitor," explains Verschueren.

Use Resources with Greater Flexibility and Efficiency

Sales representatives and consultants at Travi@ta today use Sure Step resources to work with great efficiency and consistency. "By using the Sure Step templates, it's very easy for consultants to create complete, well-produced proposal and project documents in minimal time," says Roosen. "Thorough documentation of all project components also helps them explain what we deliver and why we structure costs the way we do."

By taking advantage of the Sure Step methodology, Travi@ta has also gained greater flexibility in serving customers. De Wit, says, "Sure Step practices let us reassign resources or let consultants cover for colleagues on-the-fly. There is no need for guesswork. Customers are most impressed with our consistent, seamless teamwork on their behalf."