

CASE STUDY

MARITZ TRAVEL

www.maritztravel.com



THE ORGANIZATION

Maritz Travel has provided event management, design, and meeting logistics services for more than 50 years. Headquartered in St. Louis, MO, Maritz Travel is a subsidiary of Maritz Holdings Inc.

THE PROBLEM

After restructuring the company's business management process, Maritz Travel leadership realized they had different CRM requirements than when they had first implemented a CRM solution for their organization.

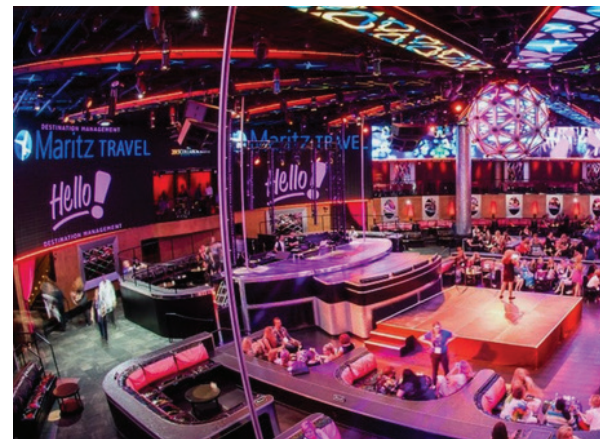
Their existing CRM system had limited functionality to meet their evolving needs, particularly in sales forecasting functionality. It also lacked integration abilities with other critical business tools. Ultimately, this was causing inefficiencies for their sales staff that was affecting productivity and profitability.

Faced with two options – upgrading their outdated solution to avoid the need to migrate their large database, or migrating their large amount of data to a new system with improved functionality – management turned to established CRM partner TrellisPoint to evaluate the company's needs and recommend a best-fit solution.

THE SOLUTION

Engaging with Maritz Travel's business and IT leadership teams throughout a number of discovery sessions, TrellisPoint ultimately determined the cost of investing in ongoing updates to their existing CRM system was prohibitive.

Instead, they recommended Maritz Travel migrate to Microsoft Dynamics 365 to take advantage of seamless integrations, robust sales functionality, and reliable support.



Maritz Travel is one of the world's most experienced event management and design companies, trusted by top meeting planners, sales operations and procurement teams at Fortune 100 companies for their event management needs.



Despite the vast amount of data that would need to be moved, the TrellisPoint team knew they could quickly and easily migrate Maritz Travel's data from the old system to the new – and for the same cost as a one-time upgrade of their existing solution. This was accomplished through TrellisPoint's proprietary Infor CRM Migration tool, which cut manual migration down by 75 percent and enabled TrellisPoint to complete the project within Maritz's tight deadline needs.

"TrellisPoint provided a lot of guidance to help us make the right decisions with a tight deadline – managing different perspectives without favoring one or the other," says Alfredo Legorreta, Maritz Travel VP of Business Transformation.

The final solution design, once configured and implemented, ensured Maritz Travel benefited from:

TIGHT INTEGRATIONS

By facilitating integrations with the company's other business tools, such as Microsoft Exchange and SharePoint, Maritz Travel's sales staff can securely store, organize, and access information in a single, central repository – in the office as well as remotely.

"Now, we don't need to be going to three to four different resources to obtain the information that we need, it's sitting in one system," Legorreta says. "The CRM provides data from our sales team to our operation system, and vice versa. The integration between systems has enabled efficiencies on both sides."

STREAMLINED SALES PROCESSES

By syncing with data from other internal systems, Maritz Travel's sales staff can better interact with it, as well, which has significantly streamlined the forecasting process.

Once a lead is sold, users can also more effectively update the record to a current account, and trigger built-in workflows and approval processes for efficient strategic account planning.

RELIABLE MAINTENANCE

As a Microsoft product, Maritz Travel's CRM solution will benefit from ongoing back-end updates to keep the system up to date – at no additional cost, unlike their former system. What's more, it's a familiar platform among professional talent with a vast number of affordable integration solutions.

"TrellisPoint was very effective in providing us the best recommendations on the type of Microsoft licenses we could get, and then with implementation," Legorreta says.

"Microsoft was the right choice."

THE RESULT

Switching to Microsoft Dynamics 365 to support the transformation of its business management process has streamlined the way approximately 200 members of Maritz Travel's staff does business. With access to more data across once-disparate sources through a single system of truth, its sales associates can forecast leads and strategically manage accounts more effectively and efficiently than ever – without worry that the solution will fast become out of date.

"I'd absolutely recommend TrellisPoint based on the experience we had," Legorreta says. "They made sure everything happened correctly and on time, and the functionality we have available now with the new CRM is exactly what we needed to have to adjust to the new business processes we defined."

