



# Case Study: Carlson Marketing Canada



## Customer Overview:

Carlson Marketing Canada, Canada's fourth-largest agency brand, specializes in travel, meeting, and event planning. The company provides the full range of services for clients planning major trips or events for employees, customers or others, including destination selection, contract negotiations, program development (hotel and air management), budget management, event promotion, on-site activities, creative and promotional materials and travel services.

## Challenges

Managing all of the information for Carlson Marketing services can be challenging – starting with managing the client's request for a travel proposal. Costs need to be obtained, budgets calculated, alternate travel destinations considered, and previous travel itineraries thrown into the mix. At least half a dozen people – from sales executives to budget and program planners to managers – have to collaborate quickly to deliver a travel proposal that meets a client's needs.

Carlson Marketing Canada met this challenge using paper-based forms, word processing documents and spreadsheets. The system was laborious and less than optimal. Because information sat outside of databases and not integrated with enterprise operating systems, information was difficult to aggregate and leverage both later on in the program delivery, and on subsequent travel programs. As well, each person in the process might modify the templates or complete them in different ways, making it difficult to aggregate information or ensure consistency. Standards became difficult to monitor and enforce, as employees modified templates for ad/hoc purposes. Incomplete forms often had to be routed several times to the same person, often leading to "false-starts" or "re-work."

It was difficult to know when, and which, document was officially marked as final and completed, such that it could be worked on. Manual data entry (and modification of template formulas) opened the door to inaccuracies that would have to be corrected, another time-consuming (and potentially costly) process. "It was imperative that we streamline and improve this process," said Susan Miller, Vice President, Business Process Management, Carlson Marketing Canada. "Improving the efficiency of this process was a key to showing clients how efficiently we could manage their business."

## Solution

To improve that process, Carlson Marketing Canada turned to Microsoft® Gold Certified Partner, Global 360. "We researched our options extensively," said Miller. "We chose Global 360 because we needed a business process management solution that included workflow and routing capabilities, and Global 360 had a well-defined BPM solution with workflow and routing out-of-the-box. We were also impressed with how they responded to us. Within a day or two of being here for the initial presentation, they knew our business faster than any other consultants."

The solution that Global 360 crafted for Carlson Marketing Canada combines its Process360 BPM software suite with an intranet collaboration portal based on a range of Microsoft technologies including Microsoft Office SharePoint® Server 2007, Microsoft Office InfoPath® 2007, and Microsoft SQL Server® 2005.

The solution gives the staff of Carlson Marketing Canada a single place to collaborate on the process of creating travel proposals, as well as standardized and automated business processes and workflow to streamline and expedite the process. Workers can upload documents, create new forms, update and modify forms as needed and route them based on the business process designed in the system.

## Challenges

Faced with time-consuming and paper-based processes, complex collaboration requirements between multiple departments, and difficulty delivering customer proposals quickly, Carlson needed a way to streamline and automate their processes in order to create a single solution across multiple departments, regions, and languages.

## Goals

Carlson deployed Global 360's process and document solutions to convert its manual and paper-based Travel Proposal requests into an electronic BPM system, automate the routing of work requests, and integrate with Microsoft office SharePoint Server 2007 for their intranet portal, Microsoft Office InfoPath 2007 for form creation and data gathering, and Microsoft SQL server 2005 for data collection and reporting.

## Results

Using Global 360 and Microsoft solutions, Carlson achieved faster processing of proposal requests and better accuracy in data collection, eliminated the rekeying of data, improved turnaround time by 29% - 7 days to 5 days, reduced the number of people required to process a request by 19% - 27 people to 22 people, and gained the ability to identify and address process bottlenecks and dynamically reconfigure and assign staff to optimize work.



## Case Study: Carlson Marketing Canada

*“Using the Global 360 BPM solution and Microsoft technologies, we were able to create better proposals quicker, more accurately, and integrated with our internal operating systems. This gives us a competitive edge in consolidating information that can be easily leveraged throughout the entire program delivery. Information that can be consolidated and interpreted intelligently has helped us to drive higher customer satisfaction and loyalty on programs.”*

*Stephen Cherry*

*Vice President  
Carlson Marketing Canada*

The new process for travel proposal creation at Carlson Marketing Canada begins with a sales executive developing a lead or receiving a request for proposal. The sales executive goes to the SharePoint site and uses an InfoPath form to enter information general to the proposal.

The InfoPath form activates the Global 360 application, which uses a business process and workflow to route the form to a program manager, who assigns it to a buyer. The buyer researches and inputs the cost and other information required by the proposal and routes it back to the manager. The manager approves the proposal, then routes it to the sales executive who delivers it to the client. Once the program has been won, the buyer completes this phase of the deployment by attaching the LOI contract to the work packet and completing an InfoPath “critical” path form, which outlines in the Microsoft SharePoint calendar for all employees working on that program to know when key milestones must be delivered to the client. For the first time, employees now know when key dates are approaching in a single place, and alerts are sent to employees when dates are approaching, to enforce on-time delivery. This is especially important as a single employee may be working on 10 large scale travel programs at once, each one potentially spanning up to six months in delivery.

Now, once a program has been sold, the file immediately moves to the Operations delivery group, alerting the Travel Account Manager, Finance Project Analysis, and supporting Delivery Groups that need to support the program. Now they are proactively solicited for their help, and they can more easily accommodate the request, manage their resources, and monitor work-effort.

The Global 360 application enables several people to work on the proposal simultaneously, ensures that the proposal has all required information before it is routed, and makes it possible for managers to understand where the proposal is in the development process at all times.

### Results

“We are able to create better proposals faster, boosting customer satisfaction and loyalty, thanks to the Global 360 solution and Microsoft technologies, said Stephen Cherry, Vice President, Carlson Marketing Canada.

One of the biggest benefits of the solution, according to Stephen Cherry, is the ability to identify and address bottlenecks that delay the process of creating proposals. The solution also makes it possible for Carlson Marketing Canada to dynamically reconfigure and reassign staff to optimize their work on proposals.

“In the past, it wasn’t always possible to pinpoint where a proposal was in the process, and what the holdups were preventing us from completing it quickly,” he said. “Now, we have that information, and that makes it possible for us to continually improve our proposal process.”

Proposals that used to take weeks to complete are now completed in days. Project Managers, Finance Analysts and Senior Management now have accurate information immediately, helping to facilitate day-to-day work effort. Carlson Marketing Canada can now better plan for programs, and assign resources more effectively. Resource planning and utilization of resources is now much easier. They can now proactively predict bottlenecks in high delivery periods, and adjust staff levels when programs do not support the work load. This was not easily done before.

When you add in the fact that data is more accurate, timelier, more easily integrated, and resources and work-effort can be more easily managed, Carlson Marketing Canada’s ability to deliver projects has become more efficient by 25% for this phase in the delivery of the program.