

How Clade helped Australia's largest privately owned travel management company prepare for exciting growth



Creating visibility for TravelEdge Group by updating and streamlining its reporting processes

COMPLEX TRAVEL RECORDS AND OPERATIONAL DATA TURNED INTO ACTIONABLE INSIGHTS FOR TRAVELEDGE GROUP'S LEADERSHIP TEAM

TravelEdge Group is Australia's largest privately-owned travel management company, offering a full suite of services including corporate travel, in-house travel management solutions, events and groups, holiday and leisure services, academic services and travel prizes and incentives. As one of the largest shareholders in CT Partners and part of the Radius Network, TravelEdge Group has an annual corporate buying power of \$1.5 billion and a truly global reach.

A NEED FOR ORGANISATION-WIDE VISIBILITY

After 12 months of extensive business improvement, TravelEdge Group were looking to continue their growth trajectory. However, outdated internal reporting capabilities were proving a major obstacle. Reporting from their legacy system coupled with spreadsheets was inefficient, unwieldy and error-prone. A major overhaul was needed to provide the leadership team with the information they needed for growth at this scale.

CEO, Kim Wethmar, was concerned that the team lacked the visibility to assist them in making informed business decisions quickly and effectively. "As a travel management company we have access to large data sets" she says. "We not only require insights into the general operational data and trends, but also need to surface sales activities, retention metrics, financial health of the business in a single dashboard. On top of that, we're a people business, and I am passionate about employee engagement. We worked very hard to build an open, feedback driven culture and I like to have real-time insights into these key metrics."

TravelEdge Group conducted a rigorous selection process before choosing Microsoft Power BI as the analytics platform and Clade as the partner to develop and implement the enterprise-wide “Reporting Refresh” Business Intelligence project.

“We had already invested in the Microsoft Office 365 and Dynamics 365 platform, therefore Power BI was a logical choice for us,” says CIO Senthu Jegadheesan. “We shortlisted a few very strong BI specialists but Clade stood out for their travel industry experience, their expertise in both Power BI and Dynamics 365 and also their partnership approach.”

“We chose Clade from a strong field of contenders for their travel industry experience and their expertise in both Power BI and Dynamics 365.”

SIMPLIFY, AUTOMATE AND IMPROVE

The project’s primary objective was to simplify, automate and improve the internal reporting outputs and processes. The report formats needed to be standardised and delivered to authorised end users, starting with the executive leadership team, anywhere and on any device.

In total, 73 reports were defined. Finance was the key stakeholder and needed to take delivery in three months.

The project presented three major challenges.

- The complexity of the system landscape

Data had to be extracted and transformed from a variety of sources, including a travel management automation software, online booking tools (OBT), finance, payroll, HR, contact centre management software, and Microsoft Dynamics 365 and SharePoint.

- Lack of a data dictionary

Critical to any BI project, a company-wide data dictionary describes the contents, format, and structure of the database and the relationships between its elements. This ensures, for example, that a particular debtor code is consistent across all systems.

- Organisation-wide, crossdepartmental reporting requirements

The CFO was the project sponsor and the largest stakeholder but the project encompassed the whole organisation, including each department’s reporting requirements. As multiple data sources had to be combined to deliver the required dashboards there was a significant amount of data extraction, transformation and consolidation.

AN ITERATIVE APPROACH

Business Intelligence projects need to be treated as business projects – it’s the business user who will ultimately decide on its success or failure. At the same time, IT is a significant component, which means business users may not be able to define exactly what information they hope to gain.

TravelEdge Group's initial requirements were set out in 73 reports. However, the process of defining and thinking deeply about their information and needs prompted new ideas. As the project proceeded they were also more able to visualise the scope of the new reporting capabilities.

Clade's iterative approach accommodated this evolution. The heads of each department were continually engaged to ensure the dashboards and reports met the expectations and the data was validated. And short release cycles of the developed data models and dashboards allowed rapid feedback and updates.

Clade also educated and trained TravelEdge Group's power users to become self-sufficient. In BI projects in particular, once the data model and guidelines have been defined the business users can design and deliver subsequent dashboards themselves.

ACTIONABLE INSIGHTS AT THE EXECUTIVES' FINGERTIPS

The new implemented analytics platform met the key objectives of "Reporting Refresh" by simplifying, automating and improving the reporting processes and outputs. With comprehensive and easy-to-navigate dashboards, each department executive now has easy access to the information they need and they're able to act on those insights immediately.

"It's still too early to do a full ROI on the project but we can already see an enormous improvement in productivity," says CFO and project sponsor Gordon Timm. "For instance, it used to take the team days to prepare our boards reports and now, with just a few clicks, we have the required information in the right format for our board members. I'm very excited about what the future holds and look forward to leveraging the platform to start answering some of the tough questions around budgeting and forecasting in the coming months."

AT A GLANCE

OBJECTIVES

- Simplify, automate and improve the internal reporting outputs and processes
- Enable the leadership team to make timely decisions based on operational data
- Consolidate disparate data sources into a holistic view of the organisation
- Standardise delivery of reports and dashboards
- Ensure that information is available on any device

BUSINESS BENEFITS

- Increased operational efficiency from a fully automated extraction and transformation process
- Rapid creation of board reports
- Improved accuracy of finance reports
- Real-time insights and the capability to drill down into operational KPIs allow management to respond quickly to issues

Learn more about Clade: clade.com.au