

CASE STUDY

Travel - Agency Sales Reporting

Client:

Global travel group with 800+ member agencies across North America and Australia.

Problem:

Need to produce monthly sales reports for members using data collected from over 150 suppliers (airlines, cruises etc.).

Solution:

Automated process for collecting and validating supplier data, matching data to each member, and then distributing sales reports

**Before:**

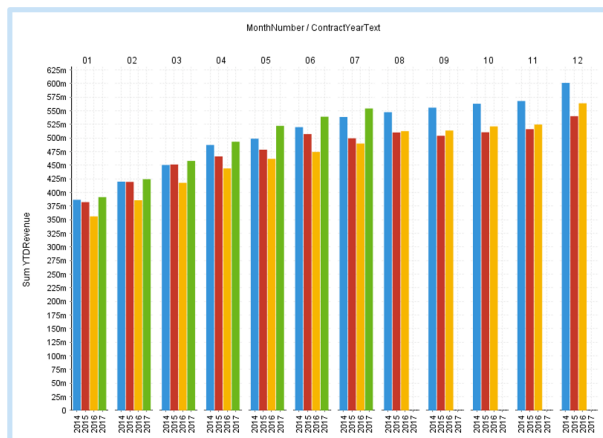
- Manual and time consuming process with complex rules for matching sales to members.
- Reliance on a rigid CRM system for reporting making it hard to adapt to changes.
- Limited visibility, validation and exception reporting.
- Data not stored in an appropriate format for MIS reporting.

After:

- Fast, automated processing with "automated matching" feature based on user defined rules.
- Flexible solution with full use of SQL rather than a proprietary query language.
- Complete visibility and transparency around data flow, mapping and calculation rules.
- Storage of monthly revenue data in structured tables for MIS reporting.

SAMPLE OUTPUT

Category	Supplier	Currency	Revenue			Revenue Variance	Passengers		
			YTD 2015	YTD 2014	YE 2014		YTD 2015	YTD 2014	YE 2014
Air	Air Canada Vacations	CAD	97,524	34,392	35,711		52	28	30
Air	Air New Zealand	CAD	18,979	7,436	8,523		0	0	0
Air	Porter Airlines	CAD	8,217	0	0		0	0	0
Air	Singapore Airlines	CAD	1,637	0	0		0	0	0
Air Subtotal			126,357	41,828	44,234		52	28	30
Cruises	Azamara Club Cruises	USD	14,556	5,630	5,630		6	3	3
Cruises	Celebrity Cruises	USD	91,089	119,491	119,348		61	71	71
Cruises	Crystal Cruises	USD	22,062	53,939	53,939		4	10	10
Cruises	Cunard Line Ltd	USD	8,436	8,936	8,936		0	0	0
Cruises	Holland America Line	USD	322,671	458,676	458,676		191	327	327
Cruises	Norwegian Cruise Line	USD	10,525	6,090	6,090		11	6	6
Cruises	Oceania Cruises	USD	50,050	45,045	45,045		0	0	0
Cruises	Paul Gauguin Cruises	USD	23,780	0	0		4	0	0
Cruises	Princess Cruises/Tours	USD	225,633	197,515	197,515		0	0	0
Cruises	Regent Seven Seas Cruises	USD	0	22,134	22,134		0	0	0



SupplierName	Currency	Sum YTDRevenue
Princess Cruises/Tours	USD	70,760,088.00
Royal Caribbean Cruises	USD	68,722,341.00
Transat	CAD	59,634,333.61
Holland America Line	USD	58,739,822.00
Signature Vacations - Sunwing	CAD	53,529,001.47
Celebrity Cruises	USD	48,505,196.00
Norwegian Cruise Line	USD	37,889,786.00
Viking River Cruises	USD	35,921,126.00
Delta Vacations	USD	32,107,450.00
Apple Vacations	USD	28,669,979.00
WestJet Vacations Inc.	CAD	27,322,405.14
Oceania Cruises	USD	27,243,582.00

MATCHING STATUS DASHBOARD

Supplier Data Load Status

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Supplier	Load Status	Percent Complete	Currency	Total YTD Revenue	Loading Method
Abercrombie & Kent	Fully Matched		USD		CSV Bulk Import
Adventures by Disney	Fully Matched		USD		CSV Bulk Import
African Travel, Inc.	Fully Matched		USD		CSV Bulk Import
Air Canada Vacations	Fully Matched		CAD		CSV Bulk Import
Air New Zealand	Fully Matched		CAD		CSV Bulk Import
Air New Zealand	Fully Matched		USD		CSV Bulk Import
Air Tahiti Nui	Fully Matched		USD		CSV Bulk Import
Alexander + Roberts	Fully Matched		USD		CSV Bulk Import
Allianz Global Assistance	Fully Matched		USD		CSV Bulk Import
Alpine Adventures	Fully Matched		USD		CSV Bulk Import

Ability to track matching status by supplier.

Supplier Revenue Data - Manual Matching and Overrides

Supplier Data										Override Values				Matched Agency			
SupplierID	ReportingDate	ContractYear	YTD Pax	YTD Revenue	Currency	YTD Pax	YTD Revenue	MatchingMeth	Name	IATA	Phone						
142	31/07/2017	2017	-	278.00	CAD			IATA	: Oakville								
142	31/07/2017	2017	-	82.00	CAD			IATA	: Oakville								
111	31/07/2017	2017	3	11,343.00	CAD			Phone	: Oakville								
142	31/07/2017	2017	-	1,428.00	CAD			IATA	: Oakville								
197	31/07/2017	2017	70	75,347.16	CAD			Phone	: Oshawa								
198	31/07/2017	2017	65	106,415.98	CAD			Phone	: Oshawa								
203	31/07/2017	2017	14	40,220.50	CAD			Phone	: Oshawa								
126	31/07/2017	2017	-	4,677.20	CAD			IATA	: Oshawa								
245	31/07/2017	2017	2	27,998.00	CAD			Phone	: Oshawa								
168	31/07/2017	2017	-	657.09	CAD			Alias	: Oshawa								
111	31/07/2017	2017	-	-	CAD			Phone	: Oakville								
142	31/07/2017	2017	-	406.00	CAD			IATA	: Oakville								
142	31/07/2017	2017	-	120.00	CAD			IATA	: Oakville								
111	31/07/2017	2017	-	-	CAD			Phone	: Oakville								
142	31/07/2017	2017	-	90.00	CAD			IATA	: Oakville								
142	31/07/2017	2017	-	124.00	CAD			IATA	: Oakville								
147	31/07/2017	2017	2	3,699.50	CAD			Phone	: Oshawa								
111	31/07/2017	2017	-	-	CAD			Phone	: la Travel : Niagara On Lake								
111	31/07/2017	2017	-	-	CAD			Phone	: la Travel : Niagara On Lake								
245	31/07/2017	2017	2	8,296.00	CAD			Phone	: la Travel : Niagara On Lake								
137	31/07/2017	2017	-	1,497.87	CAD			IATA	: la Travel : Niagara On Lake								
111	31/07/2017	2017	4	3,141.00	CAD			Phone	: la Travel : Niagara On Lake								

Ability to drill down into data, see matching rule used and apply overrides if necessary.

KEY METRICS



AUTOMATION DEPLOYED IN 3 MONTHS.



SUBSEQUENT PHASES TO CAPTURE ADDITIONAL DATA.



COVERS BUSINESS ACROSS USA, CANADA AND AUSTRALIA.



SALES DATA CAPTURED IS NOW USED FOR OTHER PROCESSES, E.G. CALCULATION OF COMMISSIONS.



PROCESS IS RUN MONTHLY, DISTRIBUTING REPORTS TO ~800 MEMBERS.



IN-HOUSE STAFF HAVE BUILT NEW REPORTS AND PROCESSES FOR ANALYSIS OF DATA (SELF-SUFFICIENCY).



SIGNIFICANT TIME SAVINGS WITH AUTOMATED MATCHING PLUS ABILITY TO RE-RUN LOADING PROCESS.

ABOUT SOLVEXIA

SolveXia is an automation, data management and analytics platform used by banks, general and life insurers and other companies. The tool is particularly well suited to complex and specialised processes that are repetitive and would otherwise rely on spreadsheets, Access databases or macros. Users automate processes by configuring a series of drag-and-drop “robots” capable of collecting, validating, transforming and calculating data.

SolveXia executes processes faster (at least 10x), produces more credible and consistent information and enforces transparency and audit controls. By doing so, organisations are more easily able to achieve strategic objectives in areas such as compliance, customer/partner engagement and risk-mitigation.