

## Success Story

# WORKBOOKS HAS HELPED STUDENTUNIVERSE DRIVE A MORE EFFICIENT SALES CYCLE

Less time spent on admin tasks, improved reporting and faster invoicing.



“WORKBOOKS CRM TICKED THE BOXES BETTER THAN ANY OTHER CRM PROVIDER OUT THERE AND IT IS ONE OF THE EASIEST SYSTEMS I KNOW.”

**Fredrick Elliott** - Head of Business Development

## INTRO

StudentUniverse is the world's leading travel booking site for students and youth, offering discounted pricing and terms on flights, hotels and tours. Its Travel Services division also handles complex itineraries, custom designed gap year experiences and group travel requests. StudentUniverse also operates Journeys are Made @ GapYear.com, the world's largest gap year inspiration travel platform.

StudentUniverse launched in the UK in 2013 and was acquired by Flight Centre Travel Group in 2015.

StudentUniverse believes that travel is essential to a modern education. Millions of students use the service every year.



**GREATER INSIGHTS FOR BETTER DECISION MAKING**



**AUTOMATED PROCESSES AND REDUCED ADMIN**



**FASTER INVOICING**

## TIME FOR A CHANGE

For a business like StudentUniverse, a sales CRM system is essential. As Fredrick Elliott, Head of Business Development, UK, puts it: "We've used a CRM from day one, so it's part of our business. If we don't have CRM we can't operate."

For 18 months StudentUniverse had operated with different service provider, but they had reached the point where they needed a better solution. "It had become very clear we needed to upgrade," explains Elliott.

**"THE DEMANDS ON OUR DATABASE HAD GROWN OVER TIME; REPORTING WAS TAKING UP TOO MUCH TIME AND WE NEEDED TO FIND A SYSTEM WHICH WOULD TAKE FEEDS IN FROM MULTIPLE SOURCES. IT WAS TIME FOR A FRESH START ON A NEW CRM SYSTEM FOR THE CORPORATE SIDE OF OUR BUSINESS."**

**Fredrick Elliott** - Head of Business Development

## A NEW CRM PARTNER

StudentUniverse had a very clear idea of what they needed in a new sales CRM partner. Elliott and his team assessed five providers across six criteria: price, ease of use, capabilities, ability to customise, ability to have different permissions for different users, and ease of implementation.

Within two months they had selected and appointed Workbooks.

**"WE KNEW THAT OUR NEW SERVICE PROVIDER HAD TO PRODUCE US WITH THE ABILITY TO SLICE & DICE THE DATA WE PRESENT TO OUR CLIENT, MANAGE OUR FINANCE & INVOICING PROCESS AND PROVIDED AUTOMATED REPORTING/ REMINDERS FOR TRAVEL DEADLINES. WORKBOOKS TICKED THE BOXES BETTER THAN ANY OTHER CRM PROVIDER OUT THERE. THE INTERFACE WAS EASIER TO USE THAN OTHERS THAT WE LOOKED AT AND BEING ABLE TO RESTRICT USERS PERMISSIONS & VIEWS WAS AN ADDED BONUS."**

**Fredrick Elliott** - Head of Business Development

## DESIGN, BUILD AND LAUNCH

StudentUniverse designed, built and deployed its new sales CRM system without any assistance from Workbooks, and had it all up and running to full capability within a few weeks. Elliott and his team learnt everything they needed from knowledge base videos on the Workbooks website, and were then ready to set everything up.

In the first week they migrated data from the previous provider, and configured the new system to support the needs of the sales and marketing teams. In the second week those users had an hour-long training session on the new system, and used both systems in tandem. Then on the following Monday they switched everything over to Workbooks.

“Workbooks is not a hard system to implement,” Elliott reports. “It is actually one of the easiest systems I know. If you have everything lined up properly it just works. You don’t have to be a developer to understand and implement it. And anyone is able to setup Workbooks.”

The focus of this first phase was to support B2B business development, allowing the sales team to generate and nurture leads, manage accounts, track and build the sales pipeline, and report on progress.

## INVOICING AND AUTOMATION

Following a successful first phase focused on the management of tasks, data and reporting, the team moved their attention to sales order processing, invoicing and automation of business processes. This was complete within nine months. For example, it now automatically reports internally on unpaid invoices, so that the sales team can contact customers to request payment, and it delivers monthly progress reports to customers so they are kept updated on what is happening with their account and bookings.

**“THERE HAS BEEN GOOD FEEDBACK FROM USERS. WE SIT DOWN AND REVIEW OUR SYSTEMS EVERY QUARTER, AND IF SOMETHING NEEDS CHANGING WE JUST DO IT. IT’S AN ITERATIVE, VERY RESPONSIVE APPROACH, MAKING SURE THE SYSTEMS WE HAVE CONTINUE TO SERVE THE NEEDS OF THE USERS.”**

**Fredrick Elliott** - Head of Business Development

## BENEFITS

StudentUniverse is able to point to some very specific business benefits from its use of Workbooks.

The first one is improvements to the efficiency of the sales team. "We spend far less time on admin tasks such as manually recording due dates, the system sends automatic reminders to our sales team members," says Elliott. "The new system is easy to use, whether we are developing, implementing or using it. There's a simple interface which the team likes using, and we have the control we need over who can view and manage information.

The system produces valuable insights into our data which aids our decision making – in fact it was this that prompted us to start delivering monthly progress reports to customers."

Furthermore as a by-product of implementing Workbooks, StudentUniverse now invoice more rapidly and get paid sooner. This has significantly reduced aged debt and their cash position. The percentage of debt that is overdue has fallen from 20% to less than 5%.

## FUTURE

For the team at StudentUniverse the focus is now on ever greater automation and personalisation in order to offer a superior customer experience and continue growing the business.

## About

### INDUSTRY

Travel & Tourism

### NUMBER OF EMPLOYEES

51-100

### IMPLEMENTATION DATE

July 2014

### TECHNOLOGY

- Workbooks CRM
- Workbooks Business
- Outlook Connector
- Multi Currency
- Multi Company

## Contact Workbooks

### EMAIL

[sales@workbooks.com](mailto:sales@workbooks.com)

### PHONE

+44 (0) 118 303 0100

### LINKEDIN

[linkedin.com/company/workbooks-com](https://www.linkedin.com/company/workbooks-com)

### TWITTER

[twitter.com/workbooks](https://twitter.com/workbooks)

### WEBSITE

[workbooks.com](https://www.workbooks.com)