

# Case Study: Tourism Holdings Ltd

Tourism Holdings Limited (THL) is New Zealand's largest tourism company, with operations also in Australia and the USA. Operations include car and motorhome rentals in Australia and New Zealand, a specialist caravan and motorhome sales company Motek, and Kiwi Experience backpacker transport and tourism activities in Waitomo.

**Headquarters:** Auckland, New Zealand    **Staff:** 900  
**Customers:** Over two million    **Website:** [www.thlonline.com](http://www.thlonline.com)  
**Founded:** 1996    **Partner:** CloudTech NZ Ltd



## Introduction

THL is split into 3 divisions: Manufacturing, Rentals and Sales. These divisions are run separately under the parent company THL and in effect follow the lifecycle of the motor home as it moves from the Manufacturing business into Rentals, and then into the Sales Business.

Keith Chilek (Chief Technology Officer) had a vision of a centralised view of the customer across one organisation, and realised that the implementation of a CRM platform was a critical part of the master plan, beginning with the Sales division: the RV Super Centre in Albany.

## Challenges

### Little Black Books

Each salesperson owned their individual 'black books' into which the prospect's details were written. None of this data was shared by the team as a whole and if salespeople left the company, then their books went with them.

### No view of pipeline

It was very hard to predict the number of units that might be sold for any coming month. There were a large amount of Excel spreadsheets that required constant updating and managing and this proved challenging.

Being unable to measure the forward view of the pipeline also had an impact on demand generation and stock availability, as it was difficult to predict how many units would be required.

### No Process Automation

There were many manual steps required to process a new customer, such as the creation of the sales contract, the deposit payment and the 3 month warranty expiry follow up.

### No single shared view of the customer

Like many organisations within the motor and automotive industry, the business was perhaps more focused on the actual vehicle rather than the customer who purchased the vehicle. There were at least 3 different teams that interacted with the customer at some point within the customer journey. It became very hard to measure and segment customers, to provide consistent and high quality service..

### Business Process Mapping

One of the main benefits for THL was the ability to map their existing business processes into the new CRM system. To achieve this it was important to be able to define this process effectively. CloudTech worked with project team to understand this and map it effectively into SugarCRM.



### What does SugarCRM actually do?

- 1. Pipeline management**
  - > Granular view of pending vehicle sales
  - > Pipeline reports for sales meetings
  - > Custom dashlets and reports to track sales against peers.
- 2. Quotes and sales agreements**
  - > Automatically create quotes and contracts in PDF format
  - > Flexibility to add extra items and deal with 'trade-ins'
  - > All of the information is stored in one place.
- 3. Vehicle life cycle**
  - > The vehicle journey is mapped out in SugarCRM
  - > All users can see the vehicle and its relationship between other items within the database, such as being 'yard ready' for sale and linking the vehicle and the relevant job to the end user customer.
- 4. Job sheets and scheduling**
  - > For modifications to sold vehicles in the workshop, a PDF job sheet is created and printed out which allows staff to record the job status and when the vehicle will be ready for pick up.
- 5. After sales process automation**
  - > Automated after sales processes to ensure customer satisfaction, such as a courtesy call 48 hours after sale and a WOF expiry reminder.

### Tangible Business Results

SugarCRM is now an integral part of the RV Supercentre and is the key customer database that underpins the business. All users are able to access the data they require either on their browser or mobile device and are much more connected with the customers and their purchasing experience. The SugarCRM Reporting tool lets normal business users easily create reports and the SugarCRM Process Automation tool ensures that key business follows ups, reminders and tasks don't fall through the cracks!



THL's customised Sugar deployment has been developed, implemented and managed by CloudTech. CloudTech is the largest SugarCRM solutions provider in New Zealand with over 80 customers. CloudTech is firmly focused on producing good business outcomes for its customers through the clever application of SugarCRM.

*"SugarCRM has been an excellent investment for the RV Supercentre. It's one of the easiest applications to both customise (from a project managers perspective) and to use. We finally have a proper CRM system that provides a single view of the customer as they move through their new purchase. All staff regardless of the jobs they do, can access the information they require..."*

RV SuperCentre Retail Manager, Tamara Schuerlein

*"CloudTech and SugarCRM have been a good strategic fit for THL. The first initiative seems to have worked very well for the RV Supercentre and we are now in the process of extending the power of SugarCRM across the wider THL Business. We need a single view of the customer across the group and this is what SugarCRM seems to do very well!"*

THL Chief Technology Officer, Keith Chilek



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