

The Customer

The customer provides ground transportation services to businesses and consumers in North America; Europe and Asia through their web site and their toll free reservation line.

The company employs a small full-time staff at its headquarters in Greater Phoenix, and sub-contracts all services to limousine; coach and shuttle companies in the customers' locations.

The Business Need

Many of the customer's business processes were not automated, and coordination between departments was ad-hoc. For any given job, multiple activities could occur between quoting and billing; using a combination of email, fax and/or telephone.

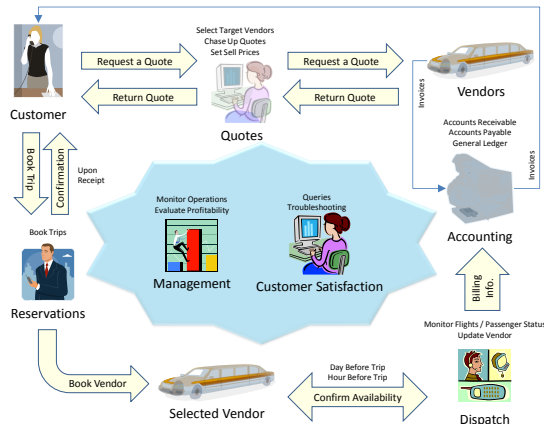


Figure 1 – Business Process Overview

Managing jobs relied too heavily on manual processes and there was no central repository for information. This led to errors and omissions, and made the process of tracking customer queries extremely difficult.

Despite promising sales; the company had been prevented from growing due to these manual processes.

In addition, Management had a pressing need to be able to monitor Key Performance Indicators and analyse reports on job history.

High Level Requirements

Avatar CTS analyzed the customer's existing business processes in order to assess where automation could best improve the efficiency of critical functions. During this process, a set of functional requirements was established. Some of the key requirements included: being able to search for all information about a job including emails and faxes; capturing and sharing trip information in the quoting and reservations phase; as well as management reports.

The Solution

The customer had previously investigated Microsoft's Office SharePoint Server product and tentatively concluded that this would be a good basis for the solution. Since Avatar CTS personnel were able to readily map most of the the high level requirements to SharePoint functions, SharePoint was chosen as the solution basis.

SharePoint document libraries were used to capture all customer and vendor emails (which could then be cross-referenced by job). A fax delivery agent picks up faxes and also emails them to SharePoint.

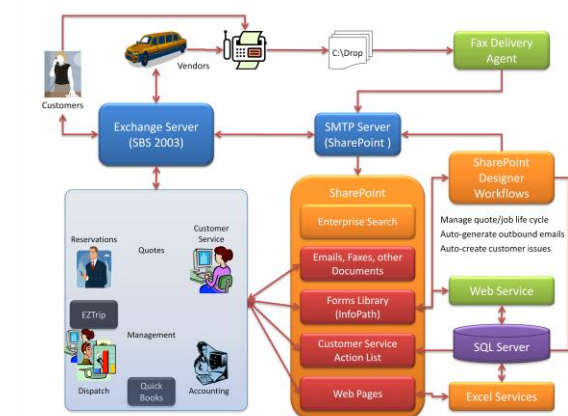


Figure 2 – Solution Overview

InfoPath forms were used to capture quote related data; including presenting trip history for similar quotes and even automatically sending an email to chosen vendors requesting a new quote.

As a trip proceeds from RFQ through estimating; to become a reservation and, eventually, a completed trip with actual charges, so the trip's form is routed between departments and additional information may be entered.

All data entered through the forms is stored in a relational database. Key fields are also promoted to SharePoint for filtering and searching.

Management reports and charts are produced from the captured trip information, using Excel Services (the server based version of Excel). This allows the reporting logic to be locked down and changes to the report logic are restricted and audited.

Last, but certainly not least, SharePoint's Enterprise Search feature has been configured to index all of the forms; emails and other site content so that all references to a given job number; customer; vendor or location can be found in a matter of seconds.

Benefits

- All quote related information (including forms, documents, emails and faxes) is now captured electronically and is visible to all departments via a browser
- The likelihood of errors is greatly reduced, since all quotes are tracked
- Each department sees forms only when relevant to their functions
- Customer service can now find all information about a specific job quickly and easily, resulting in improved customer satisfaction
- Management is able to assess operational effectiveness and evaluate key performance indicators on an ongoing basis
- The company has been able to hire new employees to support growth

Partners



The solutions described in this document were implemented using Microsoft technologies, including: Microsoft Small Business Server 2003; Microsoft Office SharePoint Server 2007 (aka MOSS 2007); SQL Server 2005; Visual Studio 2005 and the .NET Framework 2.0.

Due to incompatibilities between MOSS 2007 and Small Business Server 2003, the SharePoint site was deployed on a virtual machine instance, hosted by Microsoft Virtual Server 2005.