

PROJECT OVERVIEW

Our client charters private aircraft to corporate and private clients. After struggling with a mixture of Excel spreadsheets, they thought it time to look at bringing in a CRM application to manage clients, contacts, suppliers etc. and also to track enquiries and bookings based on their already established procedures. Standard off-the-shelf CRM applications were considered, but our client decided to go down the bespoke route after meeting with one of our consultants and weighing up the pros and cons.

The application would also be running on Windows Terminal Services, allowing remote access to the system so they could access it from home as well as the office, as they offer a 24/7 service to their customers.

KEY FEATURES

Easy Navigation and User Interface

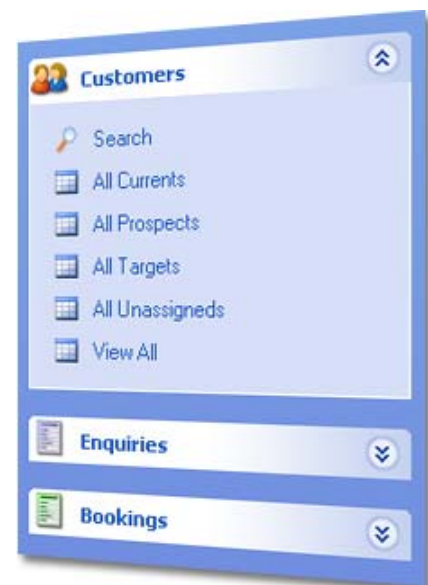
Important to any application, an easy-to-use user interface and navigation structure was key to this project. Hero adopted a navigation system similar to the Explorer Bar found in Microsoft Windows.

The UI also features familiar controls and layouts - using toolbars, tabbed forms, context menus etc. Feature-rich grids were also incorporated, allowing users to sort and group data as required.

Integration with Microsoft Office

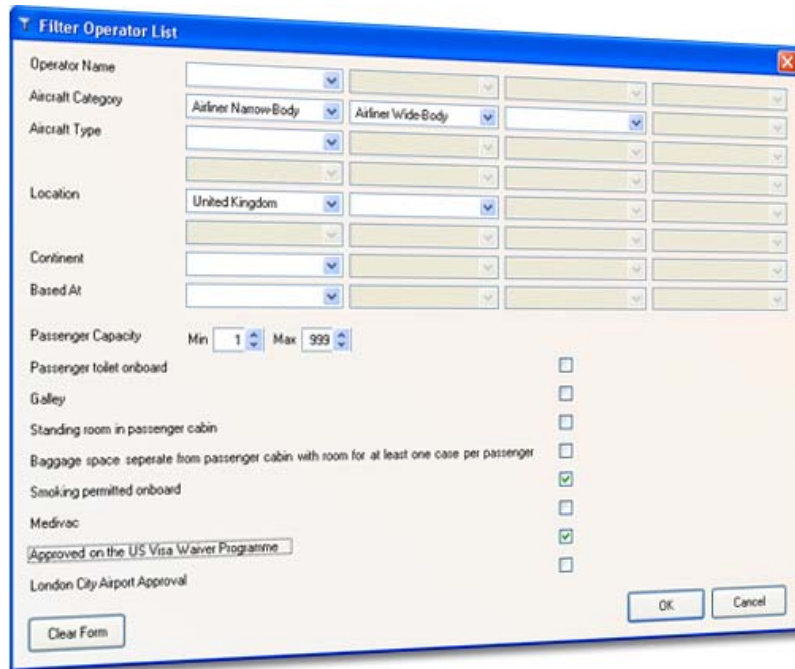
Our client already had a number of forms and documents that they'd issue to customers and use themselves to manage enquiries and bookings. They wanted the new system to generate these documents automatically, but needed to be able to edit them as well.

Hero implemented these forms and documents using Microsoft Word and Excel templates. The system would automatically populate the data into these templates and then open Word or Excel so the user could edit the document. Upon saving the file, the user could then 'attach' the file to the database record to make it easy to retrieve it at a later date.



Powerful Filtering Tool

Our client's business was chartering private aircraft for their customers. They have well over 1000 aircraft on their books, so a key part of the booking process is picking aircraft suitable for the customer. This used to rely on sifting through a huge Excel spreadsheet. Their new CRM features a powerful filtering tool to quickly select suitable results.



Email Logging Service

A task the system would be used for was to track conversations, meetings and correspondence sent out to contacts. Email was the most frequently used form of communication. Rather than manually logging an email, an automated email logging service was developed by Hero to do the job for them.

The user can create the email in their normal email application - all they have to do is add a specified address in the BCC field before sending. The CRM then receives the email, matches up the email address in the TO line against the appropriate contact in the database, and logs the email against that contact.

The logging service can handle multiple contacts in the TO line, and if it can't match any up the user will receive an email back notifying them of this.

World Time Calculation

An additional feature added to version 2 of the application was the automatic calculation of local time from UTC (Universal Time Code) times (or vice versa) when adding in flight times. After selecting a location and date/time the corresponding local time is automatically calculated for any location in the world. These calculations are based on a 3rd party database sourced by Hero Solutions, and as part of the client's support contract Hero ensure this database is kept up to date.

BENEFITS GAINED

The application has streamlined the whole business for our client. They are able to process enquiries quicker, and can produce a range of key performance indicator reports that simply weren't possible before.

When our client responded to the question "What key differences has your new software made?" in our customer satisfaction survey, this is what they said:

"Increased productivity and eased pressure as we are all able to work from one system and on-line.... we will not hesitate to deal with you in the future."

Senior Charter Manager

MORE INFORMATION

If you would like to learn more about this project, or discuss how we could do something similar for your organisation, please phone us on 0845 6120620.