

Customer success story:

# Transforming the Travel Industry with Certinia Accounting

## The Customer

Established in 1946, Short's Travel Management (STM) stands as a family-owned, female-led, private corporation. They are experts in sports travel, specializing in team travel, recruiting travel, group hotels, bus charters, and air charters, serving hundreds of athletic departments annually. They boast a record of moving more student athletes than any other travel management company. STM's mission centres around enhancing the experience of travelling to, staying at, and returning from a destination.

The team at STM is dedicated to making team travel easy, driving innovation, delivering excellent service, and demonstrating teamwork, passion, and commitment throughout the course of their relationships. STM collaborates with clients to customise travel programs, creating efficiencies and maximizing the value of their products and services.

## The Challenge

Short's Travel Management began experiencing challenges with their legacy accounting system that hindered their operational efficiency and growth plans. The system, in its earlier glory, now failed to meet the fast-paced demands of STM's business, crucially lacking in process and workflow automation. This shortcoming led to inefficiencies and unwelcome delays in converting Opportunities-to-Sales invoices, a fundamental operational aspect of the company. Moreover, the team found themselves entangled in the time-consuming and error-prone process of manual data entry, as the existing system only tracked dimensions without the ability to input them. These cumulative challenges were becoming a significant barrier to their ambitious expansion plans and their commitment to delivering seamless services to their valued customers.



### Client name

Short's Travel Management

### Industry

Travel

### Organization Size

140

### Headquarters

Waterloo, IA



**Certinia Accounting**



# The Solution

*“As the Project Manager for STM, Agilyx was a great partner and provided a knowledgeable team who guided us through every step of the implementation. They listened and learned what we needed and therefore by the time we were ready to go-live our team was confident and ready for this transition. They continued their support as we trained our team and closed our first month.”*

– Chris Talamantez, Corporate Controller

## Contact Agilyx

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## Key takeaways from the project



Real-time data visibility and robust reporting capabilities has yielded quicker, better-informed decision-making



Workflow and process automation has streamlined employees' schedules, enabling better productivity and time for more strategic projects



The Salesforce platform has given STM the flexibility, stability and security to grow and adapt to the ever-changing needs of the travel industry

## Final Summary

Recognizing the challenges of their existing system, Short's Travel Management made a strategic decision to implement Certinia Accounting with Agilyx. This decision was driven by the need to consolidate their operations into a single, integrated platform. The company sought a comprehensive solution that would not only streamline their financial operations but also provide the flexibility and adaptability needed in the ever-changing travel industry.

The implementation of Certinia Accounting marked a significant turning point for STM. This cloud-based solution provided robust reporting capabilities and real-time visibility into their financial data, enabling STM to make data-driven decisions faster than ever before. Additionally, Certinia's automation of routine tasks allowed STM's staff to focus on strategic activities, improving the team's productivity and efficiency. The software's secure, Salesforce-based platform ensured the confidentiality of STM's sensitive financial data, ensuring that their customers' data is always protected. Certinia Accounting proved to be a game-changer for Short's Travel Management, driving their growth and bolstering their long-standing history of service delivery excellence.