



Customer Case Study

Montrose Travel

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Montrose Travel Expands Travel Partnerships and Improves Sales Revenue.

Montrose Travel is always on the lookout for ways to expand those travel services that enable them to offer the very best travel products across all lines of business. Montrose operates successful divisions in Corporate Travel, Groups, Meetings, Incentives, Vacation Planning, and Rewards. In order to improve sales performance and lead follow-up, they were looking for a solution that would enable them to scale quickly and ensure they had the best technology to maximize the potential of the influx of business from their online marketing channels.

“We began our relationship with ClickPoint when we realized that we were too big to not have sophisticated technology to help us manage our internal inbound online leads. Over the years, we've been able to leverage SaleExec to help us identify additional areas of opportunity to further strengthen our preferred supplier-agency relationships Without ClickPoint's technology, their continued support and assistance in developing customized workflows that fit our business objectives, we would not have been able to increase our sales exponentially. We are up double digits in gross sales as a result of the technology that has made this an overall seamless experience, thanks to the continued support and expertise of SaleExec and the ClickPoint Software team.

What makes them really great is that they are not one of those companies where the decision makers (including the CEO – Gabe) are out of touch. Although our business with ClickPoint has grown at a very high pace, ClickPoint has never made us feel like we weren't a primary focus. ClickPoint has made us feel like we are their only client by frequently joining conference calls, developing custom-reports, and helping us create operational efficiencies to meet our business objectives.”

Daren Autry – Manager Operations Montrose Travel



Montrose Travel is one of America's top 40 travel management companies, with over 200 employees, over 500 independent contractors and \$320 million in gross sales.

ClickPoint Software has helped many enterprise clients across many business verticals realize more revenue from their most valuable asset: sales prospects and leads. ClickPoint software provides lead management, a customer communications platform with sales automation. These solutions are improving the customer experience as well as the efficiency of inside sales teams.

Customizable Lead Management and Sales Solution

In 2016 Montrose Travel recognized the opportunity in providing travel services to business clientele. In order to efficiently scale this operation, Montrose utilized SalesExec to improve the following:

- ✓ Follow-up and engage their customers as they committed
- ✓ Automate email response without the complexities of managing external software applications
- ✓ Quickly train and onboard experienced travel representatives with an easy-to-use lead management solution
- ✓ Change the sales process on the fly to respond to new opportunities and truly offer a dynamic experience. Montrose Travel needed a solution that was adaptable and customizable so that they could control the changing business requirements and meet their client's needs

“Montrose has always been a great partner for us at ClickPoint. We knew we wanted to do more in the travel industry, but knew that it could be a difficult industry to tackle. The sales process for travel changes seasonally and rapidly based on a variety of factors. We knew our solution was easily customized, but we needed to prove that we could be flexible enough for this dynamic industry. We wanted a partner that was technically proficient and 100% committed to the partnership; we found that with Montrose Travel.”

Gabriel Buck – CEO ClickPoint Software

A photograph of Gabriel Buck, CEO of ClickPoint Software, standing in front of a whiteboard. The whiteboard features the ClickPoint Software logo, which consists of the word "clickpoint" in a blue, lowercase, sans-serif font with a green arrow pointing to the right inside the letter 'o', followed by a registered trademark symbol (®). Below "clickpoint" is the word "software" in a smaller, grey, lowercase, sans-serif font. Gabriel Buck is a man with short, light-colored hair, wearing a light blue and white checkered button-down shirt. He is smiling slightly and has his hands on his hips.

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Customer Support as a Cornerstone for Success

ClickPoint has always promoted a customer centric support environment. To ensure that every customer has the best experience with SalesExec, each account is provided a dedicated account manager. The support team is given great latitude to provide anticipatory customer service and do things that other software companies typically charge for. Because of this commitment, ClickPoint consistently surpasses customer satisfaction benchmarks for Software as a Service.

Learn more at www.clickpointsoftware.com

About ClickPoint Software

ClickPoint Software provides cloud-based sales lead software designed to improve efficiencies for salespeople and their managers. ClickPoint is helping to transform sales organizations through the use of their core product, SalesExec. ClickPoint is committed to engaging customers and partners with amazing onboard and post implementation support. From its headquarters in Scottsdale, Arizona, ClickPoint has been helping companies both large and small close more leads in less time.

Learn more about ClickPoint by visiting www.clickpointsoftware.com