



# CRM comparison

Standard CRM vs. TravelOperations CRM  
- designed for the unique needs of travel.



## Account and contact profile data management

| Features and functionalities                                                                                          | TravelOperations CRM | Standard CRM |
|-----------------------------------------------------------------------------------------------------------------------|----------------------|--------------|
| Travel specific details for contacts (personal preferences, memberships and loyalty programs, identification...)      | ✓                    | ✗            |
| Travel specific details for companies (policies, preferred hotels, loyalty programs...)                               | ✓                    | ✗            |
| Recent and upcoming travels                                                                                           | ✓                    | ✗            |
| Management of traveler data quality                                                                                   | ✓                    | ✗            |
| Self-service traveler portal                                                                                          | ✓                    | ✗            |
| Travel specific CRM master data management                                                                            | ✓                    | ✗            |
| Passport expiry reminders                                                                                             | ✓                    | ✗            |
| Overview of customers travel services and subscriptions                                                               | ✓                    | ✗            |
| Synchronization of traveler profile information with GDS and OBTA                                                     | ✓                    | ✗            |
| Manage cost centers for corporate accounts                                                                            | ✓                    | ✗            |
| Manage travel arranger and approver roles for corporate accounts                                                      | ✓                    | ✗            |
| Account and Contact management                                                                                        | ✓                    | ✓            |
| Data ownership and data segregation based on geography, interests, buying history, behavior or other characteristics. | ✓                    | ✓            |

| Features and functionalities                                          | TravelOperations CRM | Standard CRM |
|-----------------------------------------------------------------------|----------------------|--------------|
| Customer surveys and NPS                                              | ✓                    | ✓            |
| Customer performance data easily accessible                           | ✓                    | ✓            |
| Document processing and merge of CRM data with template-based content | ✓                    | ✓            |
| Personalized views, charts and dashboards designed by end-users       | ✓                    | ✓            |
| Duplication check and data quality management                         | ✓                    | ✓            |

## Sales

| Features and functionalities                                         | TravelOperations CRM | Standard CRM |
|----------------------------------------------------------------------|----------------------|--------------|
| Upselling of travel services                                         | ✓                    | ✗            |
| Quotations with travel specific content                              | ✓                    | ✗            |
| Sales orders shared with ERP solution                                | ✓                    | ✗            |
| Basic reports and advanced Power BI reports embedded                 | ✓                    | ✗            |
| Lead and opportunity management                                      | ✓                    | ✓            |
| Activity timeline (tasks, emails, phone, notes, documents...)        | ✓                    | ✓            |
| LinkedIn search and match of contacts and leads                      | ✓                    | ✓            |
| Lead and opportunity scoring using AI                                | ✓                    | ✓            |
| Pipeline reporting and forecasting                                   | ✓                    | ✓            |
| Process guidance and automation (sequences, playbooks and assistant) | ✓                    | ✓            |
| Goal and sales target metrics and automatic follow up                | ✓                    | ✓            |
| Customer priorities integrated with incoming requests                | ✓                    | ✓            |
| Queues and routing of incoming requests                              | ✓                    | ✓            |
| Lead assignment rules for automated allocation                       | ✓                    | ✓            |

## Marketing

| Features and functionalities                                                                   | TravelOperations CRM | Standard CRM |
|------------------------------------------------------------------------------------------------|----------------------|--------------|
| Marketing segments based on personal travel preferences and buying history                     | ✓                    | ✗            |
| Lead capture and nurturing flows for leisure and corporate business                            | ✓                    | ✓            |
| Basic marketing campaign and blast emails                                                      | ✓                    | ✓            |
| Campaign planning and evaluation                                                               | ✓                    | ✓            |
| Customer journeys and omnichannel marketing (e-mail, sms, push notifications, social media...) | ✓                    | ✓            |
| Content and marketing asset management                                                         | ✓                    | ✓            |
| Consent and subscription management                                                            | ✓                    | ✓            |
| Interests and contact subscription options                                                     | ✓                    | ✓            |

## Customer service and operations

| Features and functionalities                                             | TravelOperations CRM | Standard CRM |
|--------------------------------------------------------------------------|----------------------|--------------|
| Quick access to travel profile data                                      | ✓                    | ✗            |
| Quick access to travel order history                                     | ✓                    | ✗            |
| Profile data used as GDS-input with an easy copy to the booking function | ✓                    | ✗            |
| Onboarding project for managing new corporate customers                  | ✓                    | ✗            |
| Lookup of Account and Contact profile on inbound requests                | ✓                    | ✓            |
| Overview of requests and work items in queues                            | ✓                    | ✓            |
| Routing of requests based on predefined rules                            | ✓                    | ✓            |
| Omnichannel support and live workstreams                                 | ✓                    | ✓            |
| Use of AI and bots to enhance the customer experience                    | ✓                    | ✓            |

## Integration

| Features and functionalities                                                                                                                  | TravelOperations CRM | Standard CRM |
|-----------------------------------------------------------------------------------------------------------------------------------------------|----------------------|--------------|
| Excel embedded as data editing tool                                                                                                           | ✓                    | ✗            |
| Phone and chat integration                                                                                                                    | ✓                    | ✓            |
| Office 365 integration (Excel, Power Point, Word, Outlook, Teams and Sharepoint)                                                              | ✓                    | ✓            |
| Integrated AI based features through Outlook and Teams                                                                                        | ✓                    | ✓            |
| Standard connectors to numerous third-party add-on solutions (lead generation, phone and chat, social media, document processing, surveys...) | ✓                    | ✓            |
| Data import through Excel templates, Excel online, CSV- or other common file formats                                                          | ✓                    | ✓            |