



CRM Comparison

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



Account and Contact profile data management

Features and functionalities

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	✓	✗
Manage cost centers for corporate accounts	✓	✗
Manage travel arranger and approver roles for corporate accounts	✓	✗
Automate update of booking remarks	✓	✗
Support of travel agency specific loyalty programs	✓	✗
Data segregation when working with multiple brands and products across teams	✓	✗

Features and functionalities

	TravelOperations CRM	Standard CRM
Form design for leisure and corporate business models	✓	✗
Account and Contact management	✓	✓
Data ownership and data segregation based on geography, interests, buying history, behavior or other characteristics.	✓	✓
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	✓	✗
Access to sales orders via connection to TravelOperations ERP	✓	✗
Basic reports and advanced Power BI reports embedded	✓	✗
Lead and opportunity processes for corporate business, leisure business or both	✓	✗
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	✓	✓

Features and functionalities

	TravelOperations CRM	Standard CRM
Process guidance and automation (sequences 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	✓	✗
Advanced marketing segments based on travel order details	✓	✗
Advanced marketing segments based on calculated measures and AI models	✓	✗
Ability to enrich marketing dataplatform with data from other related customer data sources	✓	✗
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 customer	✓	✗
Routing of online bookings to queues for personal support and order completion	✓	✗
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	✓	✗
Order to contact mapping of travelers and prospects	✓	✗
Request to order completion process with automatic submission to ERP	✓	✗
Submission of subscription service orders to ERP	✓	✗
Advanced travel profile synchronization to multiple external parties	✓	✗
Synchronization of traveler profile information with GDS and OBT	✓	✗
Phone and chat integration	✓	✓

Features and functionalities

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 format

