

# Getting started *with* TravelOperations CRM

Discover how easy it is to get up and running with TravelOperations CRM.

Start with the Core CRM solution and add features, functionalities, and integrations once your travel agency is ready for more.

This document will help you understand how to get started, what you get with the Core CRM solution, and what you can add - both as you start the project and down the line.



# Core CRM

## Key features

### Sales management

- Leads
- Opportunities
- Customer Onboarding

### Account management

- Company information
- Communication timeline
- Travel services, policies, programs, hotels & remarks

### Contact management

- Contact information, details & travel specific roles
- Communication timeline
- Loyalty programs
- Travel documents
- Travel preferences

### Traveler profile management

- All traveler profile data available in one interface

### Work 365 integration

- Teams, SharePoint, Outlook

## Top benefits

1

A full overview of the traveler's personal details, loyalty programs, documents, preferences, and orders enable sales reps and travel agents to deliver a more customer-centric experience.

2

Never miss a sales opportunity and convert more leads via the best practice approach that enables your sales department to capture all travel request details, receive reminders, and follow up on quotes sent to the customer.

3

With all customer data securely stored in the cloud you will never have to look for customer data in different spreadsheets, documents, and files - nor do you have to be concerned that you are GDPR compliant.

4

A full communications timeline enables sales reps and travel agents to instantly view past emails and call history that any employee of your agency has had with the traveler.

5

The Work 365 integration enables your sales and travel agents to communicate directly with travelers from within TravelOperations CRM while simultaneously storing all relevant travel information on the contact.

**Estimated implementation: 40 hours**



# GDS/OBT traveler profile integration

## What you get

Integrate all traveler profiles in TravelOperations CRM with your preferred booking tool.

## Top benefits

- 1 Receive travel requests in TravelOperations CRM, view traveler profiles connected to requests, and automatically open booking tools to finalize bookings.
- 2 Reduce duplicate data and manual booking mistakes.
- 3 Reduce manual work.

**Estimated implementation: 50 hours**



# Automation flow

Lead, queue, case & task automation

## What you get

- Automated assignment rules will direct leads to the sales representative with the right travel area expertise.
- Automated integration of traveler requests from different sources to a combined queue in TravelOperations CRM, in which each case can be assigned to a specific travel agent.
- Automated task assignments to sales and travel agents based on best practice

## Top benefits

- 1 Quicker response rates with higher conversion rates.
- 2 Enable travel agents to better handle incoming questions and requests from travelers.
- 3 Automated tasks reduce human mistakes and ensure that all travelers receive a great customer service experience.
- 4 Reduce manual work.

**Estimated implementation: 10 hours per flow**



# Self-service portal

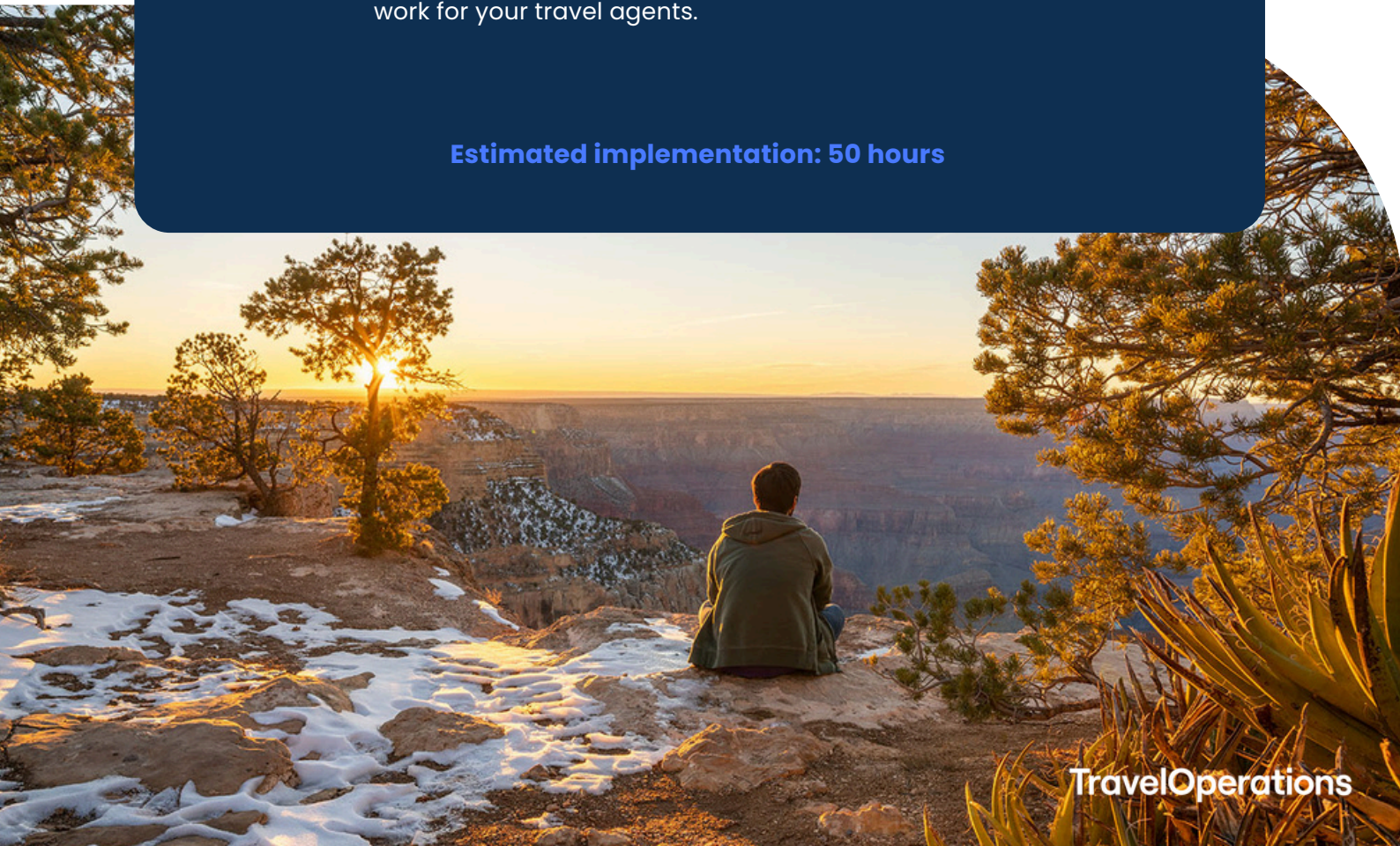
## Key features

- A self-service platform with your travel agency's brand design
- Travelers can add and update their own traveler profiles
- Travelers can view inspirational articles & blogs
- Travelers can view their bookings
- Companies can view their travel analytics

## Top benefits

- 1 Provide your customers with a digital service to oversee their own traveler data.
- 2 Information from the self-service portal will automatically synchronize with TravelOperations CRM, meaning less manual work for your travel agents.

**Estimated implementation: 50 hours**





# Customer Insights Marketing

## Key features

- Email marketing
- SMS marketing
- Website forms
- Templates & library
- Design campaigns and newsletters
- Consent center
- Scoring models
- Customer Data Platform
- Segmentation using Traveler Profile data
- Automatic integration with TravelOperations CRM, syncing contacts and leads
- Analytics

## Top benefits

1

Travel specific data enables agencies to create personalized campaigns with travel specific data captured in the Traveler Profiles such as preferences, hobbies, destinations, anniversaries etc.

2

Create upsell and cross sell flows based on data in TravelOperations CRM.

3

Leads from campaigns on LinkedIn, Facebook, your website and similar are automatically available in TravelOperations CRM from which sales and travel agents can reach out to start a dialogue.

4

All campaign data is captured by inbuild analytics tool and is integrated with each contact in TravelOperations CRM. Enable sales and travel agents to view what contacts have interacted with and showed interest in.

5

You will never have to worry about GDPR compliancy.

**Estimated implementation: 50 hours**



# Integration to TravelOperations ERP

## What you get

Order information from TravelOperations ERP will be shared with TravelOperations CRM.

## Top benefits

1

Sales and travel agents get a 360-degree overview with access to ERP data including past and future bookings on each contact directly in the CRM system.

**Estimated implementation: 40 hours**

