

White paper

# Which departments within your business can benefit from a CRM system?

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The term CRM or Customer Relationship Management is a much talked about topic and it will most likely continue to stay that way. Investing in a robust CRM system can really help take the way you deal with your customers to the next level and will significantly boost your ROI.

CRM can mean different things to different people but fundamentally it is about how businesses effectively engage with their customers. It's not just your customer service team that would benefit from investing in a CRM system; a CRM system is relevant to various teams within a travel business and can help these teams with their respective task as follows:

#### *For your Sales Team*

- Easy access to client details
- Detailed booking history and interests
- Automated workflow management for enquiry handling and quotation follow ups
- Conversion analysis through reporting tools

#### *For your Marketing Department*

- Segment customers by interest, travel history, lifetime value etc.
- Export customer contact details to your e – marketing tool of choice
- Measure campaign effectiveness

#### *For your Customer Service Team*

- Detailed transaction history
- Ability to upload documents/files to the client record
- Option to assign customers to an Account Manager

## Sales Team

### Client profiles

Do you remember everything about your clients? Probably not. When using a CRM system information doesn't get lost and the system acts like an information hub for travel agents. The client profile within a database is the most crucial from a CRM perspective as this is the record of the actual customer. It gives your sales staff access to a vast amount of information when engaging directly with the customer so they can offer them a more personal service.

The history of the client that is stored will allow sales staff to identify travel patterns such as destinations, preferred times of the year to travel, passenger numbers, spend levels and much more.

Access to this data allows you to segment the client for pricing purposes, target appropriate clients for offers based upon interests and/or booking/quote history as well as being able to easily refer to relevant stored information while engaging the client more effectively through a booking journey.

Your sales team can also identify why the client first contacted your business, their favourite activity types and favourite destinations etc. and attach this information to the client profile so they can filter on this information for marketing activity. You can tailor pricing according to the client and even label clients based on different member types such as Gold/Silver/Bronze or New/Repeat/VIP.

Workflow management and complex multi-step business processes can be automated with workflow automation. Travel consultants can create email alerts for assigned opportunities, or send reminders for other consultants to orchestrate and coordinate sales processes so nothing is missed. A CRM system will make it easier to manage enquiries and to follow up on quotations, chase payments or even call clients to welcome them home. Sales staff can easily follow up on a quote, check the status of a booking and set up reminders to chase payments. The booking flow will be smoother so travel consultants can focus on what is more important; your customers.

## Marketing Team

### Talk to your customers and leads

CRM tools are there to help you understand who your customers really are and what makes them tick. Not only does it let you organise their details within organised profiles mentioned earlier, you can also track things like their buying patterns, their spend levels, even their preferences for a certain type of holiday or destination which will enable your marketing team to use this information and send targeted marketing emails. For example, your marketing team can send them great offers just when they're starting to think about their next holiday or a personal message for their birthday, or they can email them messages before they set off on their trip and welcome them back home after their trip.

Besides talking to your existing clients, your marketing team can also use a CRM and its marketing capabilities to target potential customers with marketing messages. A CRM system lets your staff store your leads in one place and you can send marketing emails to those that need a bit more convincing that your holidays are absolutely fantastic.

Most CRM system come with a detailed and accurate reporting tool, which will make it easy to keep track of quote to booking conversions and track details about customers, enquiries and bookings. You can also track top destination, top sellers within your business, or see which customers are the top spenders. You can also easily spot sales patterns with a graphical dashboard of reports that help you track the key metrics within your business.

## Customer Service Team

### Data in one central place

A CRM system will help your customer service team access detailed client information as well as information about past transactions while keeping track of potential issues as well. It gives them a place to store client related documents and files and any communication that has been happening between the customer and anyone within your business. So, there is no back and forth between the customer service team, your account management team and the sales team and customer requests and issues will be dealt with quickly. All information is stored in one central place and accessible for everyone within your business enabling you to offer a smooth service if your customer needs you.

Investing in a CRM system can dramatically impact your staff performance for different departments within your business and help improve the overall customer experience your business offers.