CRM
By Inspiretec

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Putting the relationships into CRM

Why and how your business needs to adopt
Customer Relationship Management

Relationship is key word

As someone with a family history in the world of travel and agents, I've always admired the fabulous jobs professionals in our industry do, day in day out, week in week out – always putting their customer first.

The Covid-19 pandemic has only served to highlight how the customer service the travel agent provides is hugely valued by a public in need of advice and guidance. Indeed, whenever a major crisis hits, be that a man-made or natural disaster, invariably the travel sector feels the impact and agents find themselves on the frontline.

Dealing with the public is, for most agents and operators, what makes the job so rewarding. After all, we're in the business of selling experiences that will become clients' most-cherished memories. And we all know that the customer experience starts long before their holiday – it starts with their research and consultations with travel experts.

But there's no point denying the fact that the world is changing and consumers are being offered more choice than ever, and that includes how they opt to be served. Technology and the internet has rebalanced the relationship between brand and consumer fundamentally and the travel sector must adapt.

And this is where technology should be aligned with the human touch to take the very best practice and make that the benchmark on which all firms ought to base their service levels.

The most important aspect of Customer Relationship Management is that word in the middle: Relationship. Relationships are what make us all human and build great experience. But technology has the potential not only to enhance those relationships but to make them even more personal and meaningful.

As the travel sector recovers from the pandemic, it's going to be essential that the industry, to which I owe so much personally, grasps this. It is that message that this white paper aims to get across to inspire readers to use all the tools at their disposal to face current challenges and ensure a prosperous future.

Simon Powell, CEO, Inspiretec

What is Customer Relationship Management (CRM) software?

A CRM is a single customer view tool. It pools all of a company's knowledge about a customer and their interactions with its brand into one place.

This underpins each individual function of the CRM, whether it's matching clients, or managing marketing, sales and support, operations and workflow.

CRM

What's the importance of single customer view? Ask finance...

In any business it's vital that invoices are paid and received correctly for business reporting and tax purposes, so having a single client view is essential.

But often sales will have a different use for customer data than marketing, accounts or operations, and yet, if better aligned, they can make use of each other's expertise.

Building a single customer view means you understand those interactions through all the different parts of the customer lifecycle, so forming the knowledge foundation of the CRM.

Customer lifestyle data points

First interaction

Web tracking

Store visits

Documents and emails

Quote and booking information

Marketing information

Payment information

Elevate everyone to be as good as your best salesperson

We are not in the kind of industry where we want full automation, but we want to create that baseline and consistency of service.

To take the human element out would be to remove a lot of the experience. As a customer, you want the human touch and the knowledge that there's someone who can help you.

In these current times with Covid, the brands that have offered enhanced service and worked hard with customers when things have gone wrong are the ones that have the highest rebook ratios.

Inspiretec's view:
It may sound basic, but having a CRM means there's a system in place to ensure everyone hits the gold standard of customer service consistently

Mix data with human intuition

Automated recommendation engines take data about past purchases and make basic guesses about what customers might need, like suggesting baby wipes nine months after buying a pregnancy testing kit.

That approach does not work as well in travel. Just because someone went on holiday to Spain last year, that doesn't mean they want the same or similar this year. Past purchases can give you an idea of what people want, but you should use data to enhance human intuition rather than saying 'we already know what you want to book this year'.

The scope of a CRM

◆ **KNOW**
Quantitative and qualitative knowledge of the customer available in one place

◆ **ENHANCE**
Empower the travel specialist who is interacting with the customer

◆ **FACILITATE**
People sell to people, so CRM does not replace humans but helps to engage customers and move them through the process

A CRM enables you to...

◆ **Assimilate information** – the data-driven side of the CRM

◆ **Understand your customer** – insights into customer preferences and past behaviour

◆ **Address 'perceived indifference'** – the customer wants to feel valued and will interact with brands that don't ignore them

◆ **Engage with customers how they like** – easy to do when human-to-human but more complex at a system level

◆ **Improve efficiency** – make the most of automation and self-service

◆ **Achieve sales growth and targets** – make upselling and cross-selling feel like an added-value service

◆ **Track marketing** – analyse the efficacy of campaign spend and what first attracted the customer

◆ **Tailor recommendations** – achieve hyper-personalisation by anticipating customers' needs

The data exchange formula for personalisation

Engaging with a customer on their own terms = *improved service* + *positive brand perception* + *better conversion*

*The customer's data-exchange expectation:
'I'm giving you data about myself, my preferences and buying habits, and in response I want an improved service from you'*

Successful implementation of CRM

The basis of a successful CRM implementation is to understand the data. The data's got to form the bedrock. And start off small and grow – wholesale technology changes can be hard and painful. You are far more likely to find success solving a small use case and taking it from there.

You've got to make sure the data is clean, that you're looking at all the customer touchpoints and that processes are in place so users are giving you the data you need. Consumers' perception of the way their data is being used is changing, so never take any data without permission and make sure you're careful with how it's used. Make sure you give customers value for their data or you will create more problems than you solve.

It's critical that you understand why you're bringing in a CRM and what the reasons are for implementing such a system. Don't just bring in technology for its own sake. You don't need multiple systems or over-the-top and repetitive processes, and avoid automation without a purpose. Everything needs to have an end goal, and then the understanding of that and the benefits it offers will filter down throughout your business. Successful CRM implementation puts the needs of people above processes. The way that technology advances is that it becomes easier and easier to use.
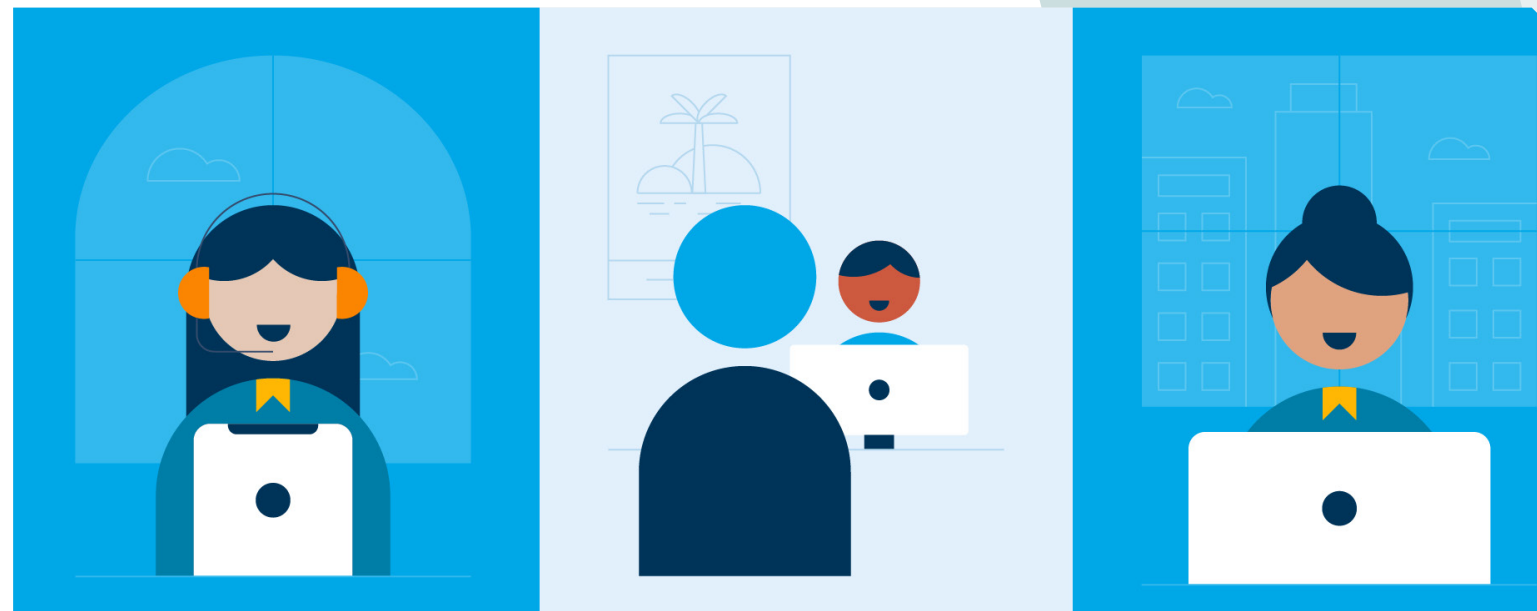
Choosing your CRM: off-the-shelf or tailored for travel?

You can take large systems off the shelf, but we know travel is quite a complex industry and customising them to work can be time-consuming and costly. Or you can use systems built more specifically to address travel needs.

There are the pros and cons of both approaches, but an off-the-shelf system is likely to come with functionality you won't use.

It's also worth considering new features that might be released in the future. A Travel CRM's client base will be other travel companies, so future releases of software offering new and improved functionality will more likely be relevant and useful to you. Look for a system that best meets your own specific needs.

Challenges to user adoption

◆ Change aversion
◆ Technology fatigue
◆ Unclear benefits
◆ Complexity
◆ Poor integration

Demystifying data

◆ **API (Application Programme Interfacing) or XMLs** – the way two systems talk to each other
◆ **GDPR (General Data Protection Regulation)** – EU legislation introduced in response to how people are becoming increasingly concerned about the way their data is used online
◆ **Data lakes** – huge 'warehouses' where data is stored, often with little or no purpose or strategy. Today, these typically sit in virtual servers located in the IT cloud
◆ **Artificial Intelligence** – technology that is capable of interrogating huge volumes of data from multiple sources and finding trends no human analyst is capable of

Empower super-users

The success of all IT projects comes down to adoption, so you need champions in the business who know the system every bit as well as the people who built it.

Communicate why you're implementing a new system and explain the benefits. Empowering teams builds affinity with the system and they will influence its development.

Your super-users will become advocates for the CRM, selling its virtues in terms of the time and effort it saves or the tasks it helps travel professionals with.

The essential CRM checklist

◆ **Choose your CRM** – match system functionality with your end goals.

◆ **User adoption** – empower your own experts to make decisions. Your IT department should not be making the decisions.

◆ **Omni-channel is not just a buzzword** – don't just focus on how your customers are behaving on your website, follow the end-to-end journey.

◆ **Data quality trumps quantity** – what are the measurements of success?

Build trust to stand out

I'm a passionate advocate for putting the customer first and delivering exceptional service – I always have been.

I have said for many years that travel agents and tour operators must build relationships and trust with their customers in order to differentiate themselves, add value and build customer loyalty.

Business is all about relationships. Over the last year we have seen an acceleration of change to the world we live in. But, as we all increasingly become data points in business' digital strategy, the fundamental principle of people caring for people has become more important than ever.

Our industry is all about giving people the holidays and experiences of their dreams.

People sell to people and we nurture those relationships by sending birthday cards and engaging with the customer throughout the year even when they're not looking for their next holiday.

It's absolutely obvious and paramount that the experience for customers in our industry begins long before a customer arrives at the airport or even their hotel.

In our fabulous industry, we don't just take their money and forget about the customer.

We care for them. We send them information about their trip in the lead up to their holiday to help build their excitement and ensure they enjoy their holiday to the maximum.

We give them a call or send them flowers to welcome them home at the end of their holiday and we take a interest in them personally.

The goal is to give every customer the same exceptional experience as your best customer.

We should embrace technology as a catalyst for ensuring every one of our customers feel valued and special.

CRM software is the pillar of building those personal relationships that make our industry so rewarding to be a part of.

David Speakman, Investor, Inspiretec

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Inspiretec

Inspiretec is an established customer-first technology partner, providing end-to-end digital solutions to help organisations grow and for the past 28 years has worked with some of the most prestigious brands in the travel industry. The Inspiretec platform delivers complete solutions for travel agents, tour operators, loyalty brands, hotels, OTAs and tourism organisations.Its reservations module delivers scalable omni-channel selling and booking management tools, and CRM provides operators with a unique customer-centric view to build engagement, and an in-house agency team delivers engaging B2C, B2B and mobile app experiences.

Travel Weekly

Travel Weekly boasts a 50-year heritage and is the UK's market-leading travel trade media brand. In addition to the flagship print magazine Travel Weekly's multimedia portfolio includes print and digital publications, websites, social media channels, jobs boards, email, video and more. It also runs the biggest and most highly-regarded events in the travel industry, from the Globe Travel Awards and Agent Achievement Awards to full-day conferences and exclusive business breakfasts, dinners and lunches.

Travolution

Travolution was founded in 2004, when Travel Weekly recognised the need to serve the fast-growing and dynamic online and travel technology sectors. The first B2B media title of its kind in the world, Travolution pioneered coverage of the sector and rapidly gained a dedicated following. In addition to news and thought-leadership on travolution.com and through social media and weekly news alerts, the brand has a burgeoning events portfolio.