



# Leveraging your data.

And building back better.

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# CUSTOMER INTELLIGENCE

right





CRM

CMS

CRM

Marketing

Reports

Personalise

Ad Builder

Data



LF Luke Francis

### Tasks

Welcome Home	5
Pre-departure	2
In-resort	0
Brochure	23
General	35

[View all tasks](#)

### Segments

All

# 63

## New enquiries today

[View all segments](#)

### Enquiries

Call	5
Brochure Request	2
Equote	0
Uncategorized	23

[View all enquiries](#)

### External Links

1 2

Travelink

Harmony

Holistic Document

Support

Add link

### Message Board



Check out the latest coach offers.

Posted by Luke Francis - Added on 12th August 2016 - 13:45

Types



Please take a look at our Holistic User Guide

Posted by Hannah Williams - Added on 10th August 2016 - 08:26



New Stock available in London, please check this out

Posted by Sean Taylor - Added on 6th August - 14:42



New Stock available in London, please check this out

Posted by Steven Goldstone - Added on 2nd August - 12:35



Add a new message

### Performance

Revenue



Current total

£10,000.00

Monthly target

£20,000.00

Stretch target

£24,000.00

Required  
£1,000.00 / a day

MacBook





Interaction.



Flexibility.



Trust.



Automation.





Reopening.



Dream

**Reach.**

Inspiration stage,  
clients dream of  
their next holiday.



Plan

**Acquire.**

Where, when,  
who, what how!?



Book

**Convert.**

Engage and convert.



Experience

**Retain.**

Before trip.  
During trip.  
After trip.



Remember

**Advocacy.**

Come back again.



Know.

Automate.

Enhance.



Know.

“A richer, more connected traveller experience and end-to-end customer engagement are fast becoming the bedrock of how loyalty is earned in the travel industry. Customer data needs to be the force behind this evolution.”



Mr Franklyn Coombes



Reference: D80  
Phone: 01245898745  
Email: franklyn.coombes@travel.co.uk

Booker

Record Created  
19/01/2021

Preferred Brand

Blue Brand

Last Marketing Contact  
N/A

Latest Client Source

Phone  
Website

Latest Booking



The Ritz Carlton

£2,565.30

Booked: 19/01/2021  
Departing: 04/09/2021

Latest Quote



The Ritz Carlton

£2,565.30

Quote Date: 19/01/2021  
Departing: 04/09/2021

Alerts

Client Group - Platinum

OVERVIEW

DETAILS

PREFERENCES

This is a limited view of activity displaying key events.

Activity

Client made an inbound call

Luke Francis created a booking

Luke Francis created a quote

Client made an inbound call

Luke Francis created a quote

Luke Francis created an enquiry

Client made an inbound call

Luke Francis created a visitor

Show all activity

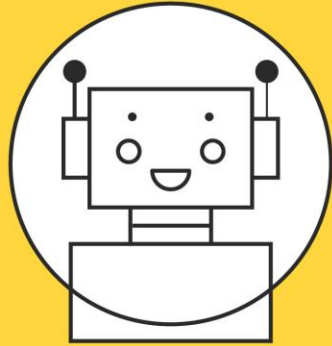


CRM  
By Inspiretec

Create a single customer view:

- Relevant data in a single place
- Use it to add value
- Apply tech sensitively
- Consider business change too
- Start small. Big will come later.

Automate.



AUTOMATION  
ADAM

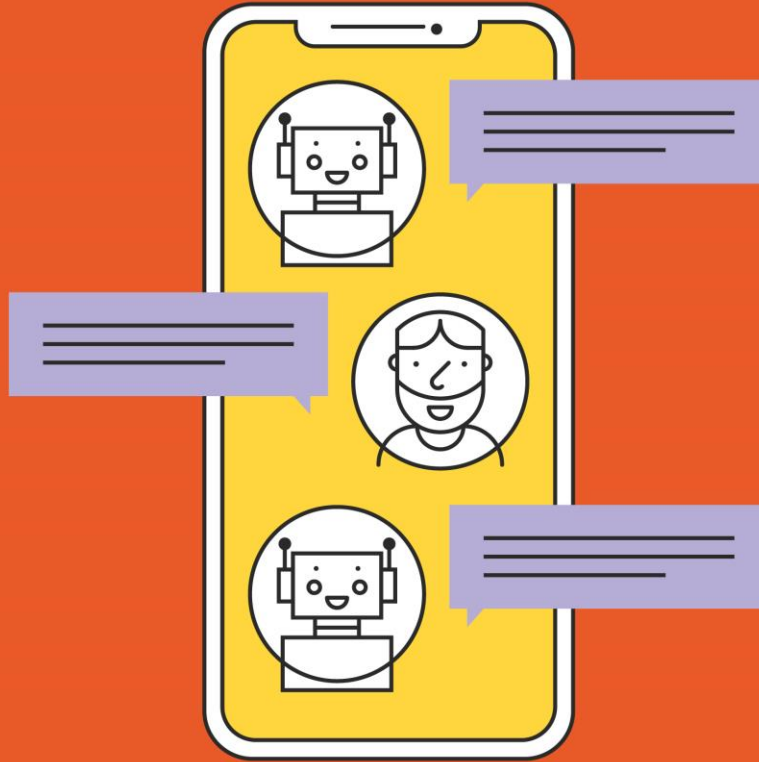
**VS**



MANUAL  
MARTIN

Automation vs. manual.

Enhance.







Text Message  
Today 10:51 AM

Hi %%first\_name%%, it's  
Brittany, following up to discuss  
cash for your %  
%spin:property::home::house%  
% located at %¿dress%%.  
Interested? Would love to  
assist. Thx



Tips for





# Things to avoid.

- Automation without cause.
- Personalisation without cause.
- Over-the-top processes.
- Inaccuracy.
- Over-the-top personalisation / creepiness.
- Not respecting client privacy - GDPR



# Tips for success.

- Create a **single customer view** (with clean data).
- Start small.
- Empower experts.
- Omnichannel focus.
- Measure success.
- Focus on quality.





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travel  
technology  
initiative



Inspiretec



CRM  
By Inspiretec

+3 months free  
for TTI members.

[TheTravelCRM.com](http://TheTravelCRM.com)



Thank you.

