## **Phase 1: Problem Understanding & Industry Analysis**

### **1. Requirement Gathering**

The travel industry faces challenges in managing bookings, customer preferences, and seamless communication between agents, customers, and vendors. For the Smart Tour and Booking CRM, the primary requirements gathered are:

* Centralized management of tour packages, bookings, and customer inquiries.
* Automation of payment reminders, travel notifications, and itinerary updates.
* Tracking customer preferences and past bookings for personalized offers.
* Integration with payment gateways for secure transactions.
* Easy-to-use dashboards for agents, managers, and customers.

### **2. Stakeholder Analysis**

The project involves multiple stakeholders, each with specific needs:

* **Travel Agents** – Need tools to create/manage bookings, update itineraries, and track customer information.
* **Travel Managers** – Require analytics, revenue reports, and complete control of CRM configuration.
* **Customers** – Expect a smooth booking experience, timely reminders, and transparent communication.
* **Vendors (Hotels, Transport, Tour Guides)** – Need a platform for timely booking updates and availability sharing.

### **3. Business Process Mapping**

The existing travel booking process often involves fragmented communication (emails, calls, manual entries). With the CRM, the process is streamlined:

1. Customer browses/selects tour package.
2. Agent confirms booking and shares itinerary.
3. Automated payment reminders and confirmations are triggered.
4. Customer receives updates on trip status and travel details.
5. Post-trip feedback collection and follow-up for loyalty programs.

This mapping ensures improved efficiency, reduced manual errors, and enhanced customer satisfaction.

### **4. Industry-specific Use Case Analysis**

### **In the travel sector, the CRM is expected to address:**

* **Seasonal Booking Spikes** – Managing bulk reservations during peak holiday seasons.
* **Dynamic Pricing & Offers** – Providing flexible discount schemes based on demand.
* **Customer Retention** – Loyalty programs and personalized package recommendations.
* **Multi-channel Communication** – Email, SMS, and WhatsApp integration for instant updates.
* **Regulatory Compliance** – Maintaining secure customer data and adhering to travel regulations.

### **5. AppExchange Exploration**

Salesforce AppExchange offers several travel and booking solutions that serve as references:

* **Travel Booking Management Apps** – For handling end-to-end booking workflows.
* **Payment Integration Apps** – For secure online transactions.
* **Customer Feedback & Survey Tools** – For post-travel insights.
* **Marketing Automation Tools** – To promote packages and offers.

By exploring AppExchange, the project ensures leveraging existing best practices while tailoring the CRM to the travel sector’s unique requirements.