

PROJECT DESIGN PHASE

[PROBLEM-SOLUTION FIT]

Problem (Customer or Operational Pain Points):

1. **Poor Customer Experience:**
 - a. Disconnected channels (call center, website, app).
 - b. Delays in support and resolution (e.g., lost baggage, flight changes).
 - c. No personalized offers or communication.
2. **Manual, Fragmented Operations:**
 - a. Reservation and support systems not integrated.
 - b. Flight, crew, and passenger data scattered across silos.
 - c. Lack of real-time status updates for staff and passengers.
3. **Limited Visibility & Analytics:**
 - a. Inability to track customer journey end-to-end.
 - b. Poor insights into sales, cancellations, service trends.
4. **High Customer Attrition:**
 - a. Low loyalty due to generic service.
 - b. Loyalty programs underutilized or not data-driven.

Solution (Using Salesforce Cloud Products):

1. **Customer 360 View with Salesforce CRM:**
 - a. Integrate reservation, support, and loyalty program data to form a unified profile.
 - b. Deliver consistent support and marketing across all channels (phone, email, SMS, app).
2. **Service Cloud for Passenger Support:**
 - a. Omnichannel support with AI-powered chatbots and case routing.
 - b. Automate common requests: rebookings, refunds, baggage claims.
3. **Sales Cloud for Revenue Optimization:**
 - a. Manage ticket sales, upselling (seat upgrades, meals), and partner offers.
 - b. Integrate with travel agents and B2B booking platforms.

4. Marketing Cloud for Personalization:

- a. Use passenger data to tailor promotions, re-engagement campaigns, and loyalty offers.
- b. Automate travel reminders, gate changes, or feedback surveys.

5. Tableau CRM / Einstein Analytics:

- a. Track KPIs like on-time performance, service levels, customer lifetime value.
- b. Predict cancellations, no-shows, and satisfaction trends using AI.

6. Integration with Flight Systems via MuleSoft:

- a. Connect legacy flight systems (e.g., SABRE, Amadeus) to Salesforce for real-time updates.

Fit (How This Delivers Business Value):

- **Boosts customer satisfaction (CSAT, NPS)** with faster, personalized support.
- **Increases loyalty and repeat bookings** through tailored engagement.
- **Reduces operational costs** by automating service and integrating data.
- **Improves decision-making** through real-time insights across business units.
- **Accelerates digital transformation** with scalable cloud architecture.

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[PROPOSED SOLUTION]

Objective:

To modernize airline operations and customer engagement by implementing a centralized, intelligent, and scalable management system on Salesforce—enhancing customer experience, streamlining services, and increasing operational efficiency.

Solution Overview

We propose a **modular solution** built on Salesforce, integrating the following key components:

1. Passenger Relationship Management (PRM) – Salesforce Sales Cloud

- Manage passenger data (personal details, booking history, preferences).
- Enable sales automation for ticketing, upgrades, and ancillary services.
- Integration with booking engines (Amadeus, SABRE, etc.) via APIs.

2. Customer Support System – Salesforce Service Cloud

- **Omnichannel Case Management:** Phone, email, SMS, social, WhatsApp.
- **AI Chatbot (Einstein Bots)** to handle common queries (e.g., baggage status, rebooking).
- Automated SLA tracking, escalations, and workflow approvals.

3. Flight Disruption Handling & Rebooking Workflow

- Proactive alerts via SMS/email in case of flight delays/cancellations.
- Self-service rebooking via Salesforce Experience Cloud (passenger portal).
- Case automation for compensation claims and refunds.

4. Marketing & Loyalty Engagement – Salesforce Marketing Cloud

- Personalized offers based on travel history, preferences, and status.
- Loyalty program automation: tier upgrades, point tracking, member campaigns.
- Customer journeys for abandoned bookings, frequent travelers, VIPs.

5. Analytics & Reporting – Tableau CRM (Einstein Analytics)

- Real-time dashboards for:
 - Bookings and cancellations
 - Customer service metrics (CSAT, resolution time)
 - Flight performance and passenger load factors
- Predictive insights: customer churn, demand forecasting.


6. System Integration – MuleSoft Anypoint Platform




- Integrate Salesforce with core airline systems (PSS, DCS, GDS).
- Ensure data flow between booking, crew scheduling, baggage handling, and CRM.
- Enable real-time updates for staff and passengers.

Additional Capabilities

- **Mobile Accessibility:** Salesforce mobile app for agents and crew.
- **Experience Cloud Portal:** For passengers to manage bookings and support tickets.
- **Compliance & Security:** Adhere to GDPR, PCI DSS, and IATA data standards.

Business Benefits

-  **Customer Satisfaction:** Faster, smarter support with personalized experiences.

-  **Operational Efficiency:** Reduce manual tasks, unify systems, automate workflows.
-  **Revenue Growth:** Upselling, cross-selling, and retention of loyal customers.
-  **Data-Driven Decisions:** Leverage AI and analytics to drive continuous improvement.

PROJECT DESIGN PHASE

[SOLUTION ARCHITECTURE]

1. Core Architectural Layers

◇ *Presentation Layer (User Interfaces)*

- **Customer Interfaces:**
 - Salesforce Experience Cloud (Passenger Portal)
 - Mobile App / Airline Website
- **Employee Interfaces:**
 - Salesforce Console (Support Agents, Sales Reps)
 - Mobile App (Flight Crew, Ground Staff)

Application Layer (Salesforce Clouds & Logic)

- **Sales Cloud:**
 - Manage passenger profiles
 - Ticket sales, upgrades, partner deals
- **Service Cloud:**
 - Customer support (cases, live chat, email, phone)
 - Omni-Channel routing & SLA tracking
 - AI Chatbot (Einstein Bots) for self-service
- **Marketing Cloud:**
 - Targeted campaigns (email/SMS/push)
 - Journey Builder for lifecycle marketing
 - Loyalty program automation
- **Experience Cloud:**
 - Passenger self-service portal (check booking, raise requests, update info)
- **Tableau CRM (Einstein Analytics):**
 - Reports and dashboards (revenue, service KPIs, flight metrics)
 - Predictive analytics (churn, delays, demand)
- **MuleSoft Anypoint Platform:**

- API integration with external systems

Integration Layer

Using **MuleSoft**, connect Salesforce to:

External System	Integration Purpose
Passenger Service System (PSS)	Booking, check-in, seat assignment
Global Distribution System (GDS)	Flight availability, pricing, itinerary sync
Departure Control System (DCS)	Gate info, boarding, flight manifests
ERP / Billing System	Ticketing, invoices, refunds, revenue tracking
Baggage Tracking System	Real-time baggage status updates
Loyalty Program Engine	Points balance, tier upgrades

APIs: REST/SOAP, real-time (webhooks) + batch sync

Data Layer

- **Salesforce Data Model:**
 - Standard Objects: Accounts (Passengers), Contacts, Cases, Opportunities (Bookings), Products (Flights/Upgrades)
 - Custom Objects: Flight Schedules, Baggage Claims, Frequent Flyer Records, Crew Assignments
- **External Systems / Data Lakes:**
 - For historical flight data, large-scale analytics, and regulatory reporting

Security Architecture

- Role-based access (e.g., agents, crew, marketing team)
- Two-Factor Authentication (2FA) for internal users
- Shield Platform Encryption for sensitive data (passport, payment info)

- GDPR and PCI-DSS compliant data handling
- Audit Trails and Field History Tracking

Workflow & Automation Examples

- **Case Automation:** Delayed baggage auto-opens a case with PSS integration
- **Flight Cancellation:** Trigger email/SMS + self-service rebooking via portal
- **Loyalty Upsell:** Frequent flyers auto-added to upgrade campaigns in Marketing Cloud
- **Agent Assist:** Suggest next best action using Einstein AI during live support