ExecuStay Lead Flow

Presented by
Scott McDonald, VP Call Center Operations
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ExecuStay Brand Lead Flow – The Goal

Customer Type
- Clients
- Individual Traveler

Lead Flow Entry Points
- .com channels
- 800#'s
- Client Requests
- OWW Offices
- EBC/GAMC
- Marriott ESD
- Epic/Ariba systems

The goal...

- Determine Need Correctly
- Transfer Need to Fulfillment Channel Quickly and Efficiently

What's working against...

- Location Alignment
- Entry Point Confusion
- Brand Knowledge & Comfort
- Process Inefficiency
- Common Systems of Record

Fulfillment Channels
- Franchise Partners
- Oakwood Worldwide Offices

ExecuStay Brand Lead Flow

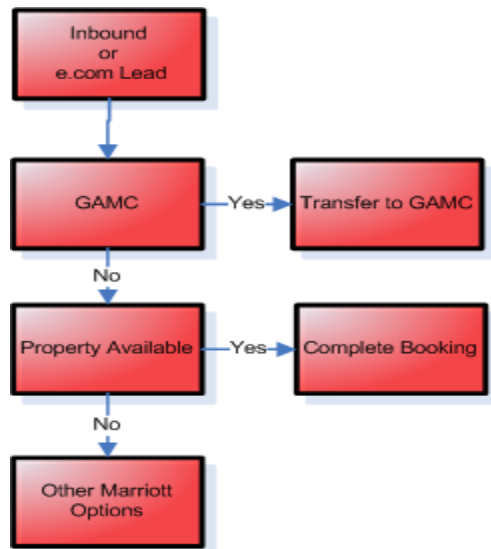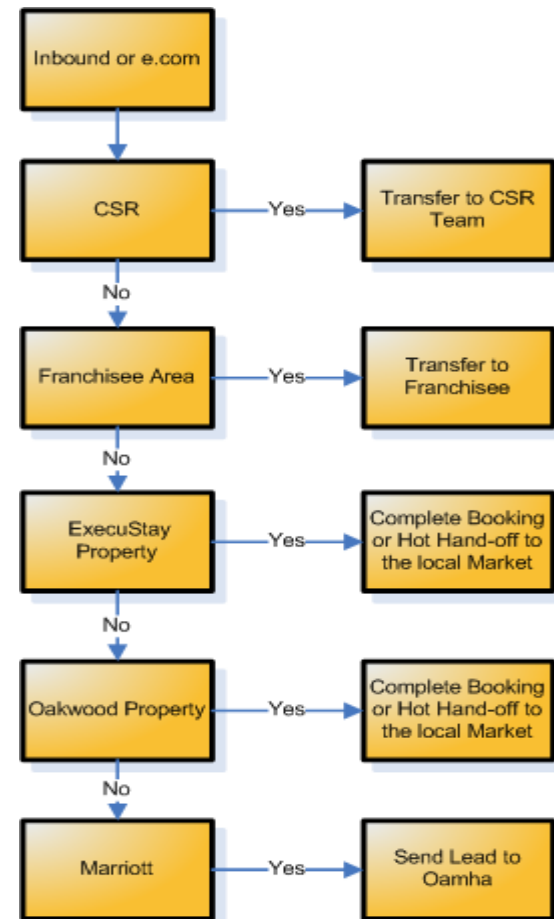|	**Lead Source**	**EBC/GAMC Objectives**	
Individual Traveler	- All ExecuStay.com & Oakwood.com channels - All ExecuStay and Oakwood 800# channels - Oakwood Market Office - Franchise Office - Omaha ESD	- Determine ExecuStay or Oakwood lead - If ExecuStay lead, send to Franchise or Oakwood office for handling - If Oakwood lead, book or send to local office for handling	**Consumer driven model with call response measurements**
Client	- Oakwood & Marriott Sales Associates - Franchise Office - Oakwood Customer Fulfillment - GAMC - Omaha ESD - Oakwood Market Office - Epic/Ariba	- Determine ExecuStay or Oakwood lead - Understand need fully (CTQ) - If ExecuStay lead, send to Franchise, support team, Oakwood office for options - If Oakwood lead, send to Oakwood office for options - Deliver options to client for approval	**Client driven model with specific SLA's**

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Individual Traveler Lead Flow – Process

Pre Acquisition


```
Inbound or e.com Lead
   │
   ▼
GAMC ──Yes──▶ Transfer to GAMC
   │
   No
   ▼
Property Available ──Yes──▶ Complete Booking
   │
   No
   ▼
Other Marriott Options
```

Post Acquisition


```
Inbound or e.com
   │
   ▼
CSR ──Yes──▶ Transfer to CSR Team
   │
   No
   ▼
Franchisee Area ──Yes──▶ Transfer to Franchisee
   │
   No
   ▼
ExecuStay Property ──Yes──▶ Complete Booking or Hot Hand-off to the local Market
   │
   No
   ▼
Oakwood Property ──Yes──▶ Complete Booking or Hot Hand-off to the local Market
   │
   No
   ▼
Marriott ──Yes──▶ Send Lead to Oamha
```

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Individual Traveler Lead Flow – Complications

As you can imagine there have been some challenges…..

- Associates not recognizing where specific franchisee properties are located
- Website inquiry and the associate provided Oakwood properties
- Greater understanding of franchisee terms
- E.Com auto reply not branded ExecuStay

Steps we have taken…..

- Focus quality observations around ExecuStay calls
- Incentives to support ExecuStay bookings
    - Gift Cards for the most bookings
    - Gift Cards for the highest pre-qualified leads
- Refresher training on the importance of quickly identifying ExecuStay franchisee leads and transferring them to the appropriate contact was completed December 6
- Coaching on feedback received from Franchise Markets

Work in progress…..

- Sales training began on November 30 for ExecuStay lead flow handling
- All e.com landing pages have been reviewed and corrected for routing
- Auto reply e-mails are being updated to include ExecuStay with a completion date of December 31

Individual Traveler Lead Flow – Recommendations

- **Franchisee encouraged to "shop" ExecuStay Calls**

- **Monthly Operations Calls**
  - Beginning January 2013
  - Coordinated with Suzanne Guerra

- **Quarterly Process Review Meetings**
  - Objectives and dates to be determine at first monthly Operations call

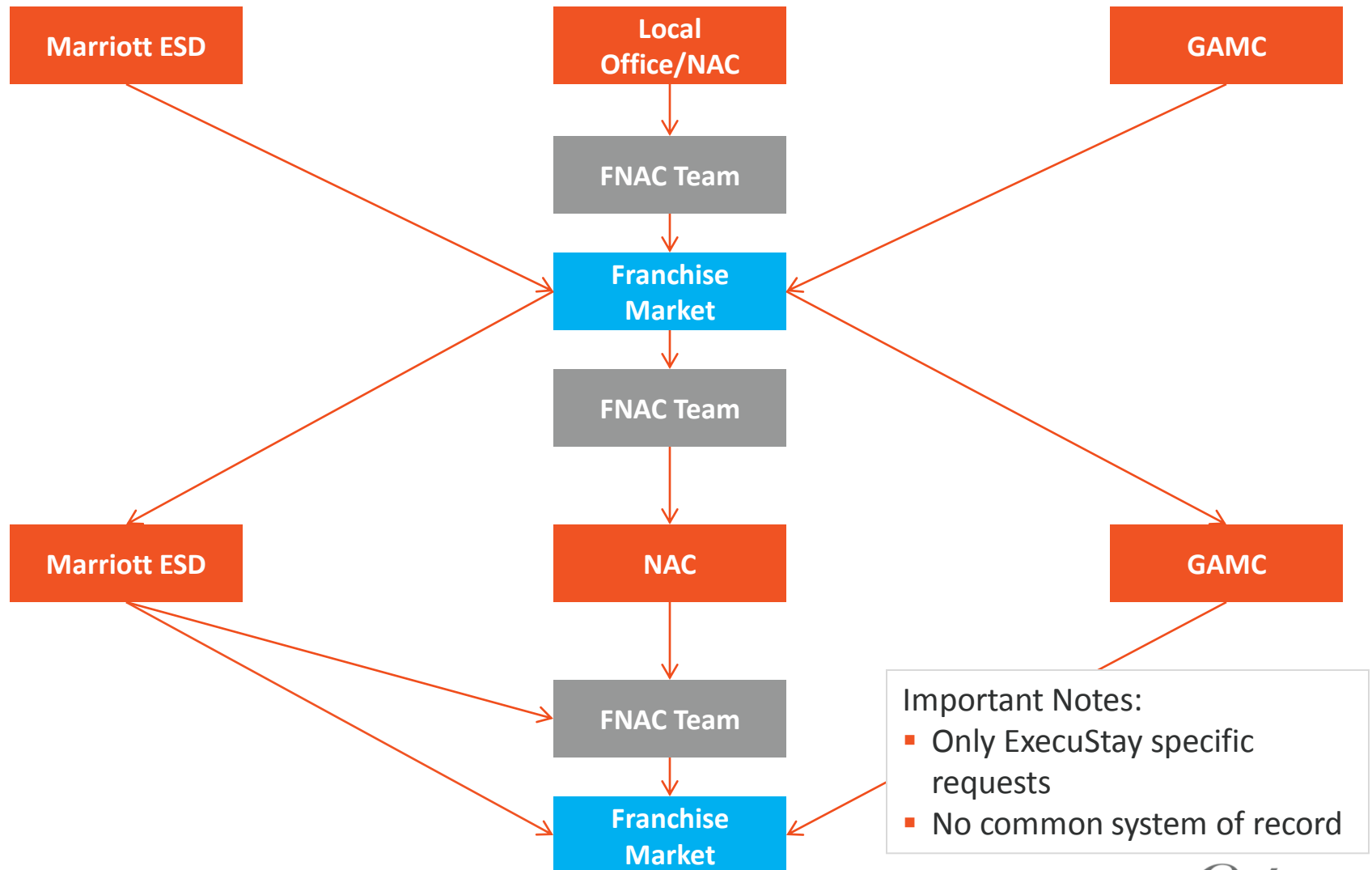# Individual Traveler Lead Flow – Action Plan

Challenge	Action Plan
Associates not recognizing where specific franchisee properties are located.	Partner with Franchisees to gain agreement on what Associates should be communicating.
Associates don't seem to be looking at e.com for properties.	Refresher training has begun and will be completed in January 2013
Auto reply states Oakwood.	Identified auto-replies for ExecuStay. New verbiage has been created and new templates will be loaded by December 31.
Associates are not comfortable with the ExecuStay brand.	Sales training for ExecuStay began November 30. The focus is on how to create and communicate the ExecuStay value. Incorporate reward points into the sale. The goal is to make our Associates as comfortable with ExecuStay as Oakwood.
Not all landing pages are routing to the correct market.	All forms and links from the Help page and the About ExecuStay pages have been updated. In addition, we've reviewed the contact phone and email numbers for the properties and all of the franchise information is correct.

Client Lead Flow Process – Post Acquisition

Marriott ESD

Local Office/NAC

GAMC

FNAC Team

Franchise Market

FNAC Team

Marriott ESD

NAC

GAMC

FNAC Team

Franchise Market

Important Notes:
- Only ExecuStay specific requests
- No common system of record

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Client Lead Flow – Action Plan

Challenge	Action Plan
▪ Franchisee support Associates (FNAC) were not recognizing specific Franchisee coverage areas.	▪ Updated lists acquired in early July. Epic rolled out to Franchisees and locations mapped accordingly.
▪ Legacy clients are consolidating requests to one fulfillment resource and not requesting a brand.	▪ Both brands offered for all legacy ExecuStay clients in November 2012. Epic system integrated into process in December 2012 and all clients receiving both brands by January 2013.
▪ Duplication of client requests as Marriott ESD generates requests without common system of record, client confusion, etc.	▪ Current discussions about consolidating all ExecuStay requests through one source.

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The process for handling "open" requests has been updated...

- **Our fulfillment model has transformed**
  - New centralized CSR process allows us to create ideal environment for lead flow
  - Provides us an opportunity to drive new process without legacy behaviors

- **Dual brand requests are now standard**
  - Currently, all shared accounts covered by Marriott ESD & Oakwood EBC/GAMC have been receiving two options (November 2012)
  - All accounts will receive both ExecuStay & Oakwood options for all "open" leads (December 2012)
  - CSR manages the lead inputs and response
    - Email requests prior to 12/10/12
    - Standardized using the epic system as of 12/10/12
  - Regardless of franchise market or managed market, two options are provided for the guest/client

Accounts receiving both Oakwood & ExecuStay Options	
Accenture	EBC
Abbott	**ESD**
AIRES	EBC
Altair	GAMC
Bridgestreet	**ESD**
Broadridge Financial	EBC
Brookfield Relocation	**ESD**
Capgemini	EBC
Capital Relocation	GAMC
Chevron	**ESD**
Chick-fil-a	**ESD**
Crown Relocation	EBC
CSC	EBC
Darden Restaurants	**ESD**
Deloitte	**ESD**
Ernst & Young	EBC
Exxonmobil	**ESD**
Fidelity/Weichert	GAMC
General Dynamics	**ESD**
Harris Corporation	EBC
Hewlett Packard	**ESD**
Huntington Ingalls	EBC
Johnson & Johnson	EBC
JPMC	GAMC
Lexicon Relocation	EBC
Lockheed Martin	**ESD**
MSI	**ESD**
Northup Grumman	**ESD**
Novo-Nordisk	EBC
NuCompass Mobility	**ESD**
Oracle	EBC
Plus Relocation	EBC
Prudential	**ESD**
PWC	GAMC
SAIC	**ESD**
SAP	**ESD**
Sapient	EBC
The SiegfriedGroup	EBC
Thoughtworks	EBC
Weichert Corp Housing	**ESD**

Client Lead Flow – Current & Future Strategy

1. **Utilize epic system backbone to source multiple options**
   - No additional fees, used as backbone solution
   - Develops speed and common system of record vs. multiple opportunities
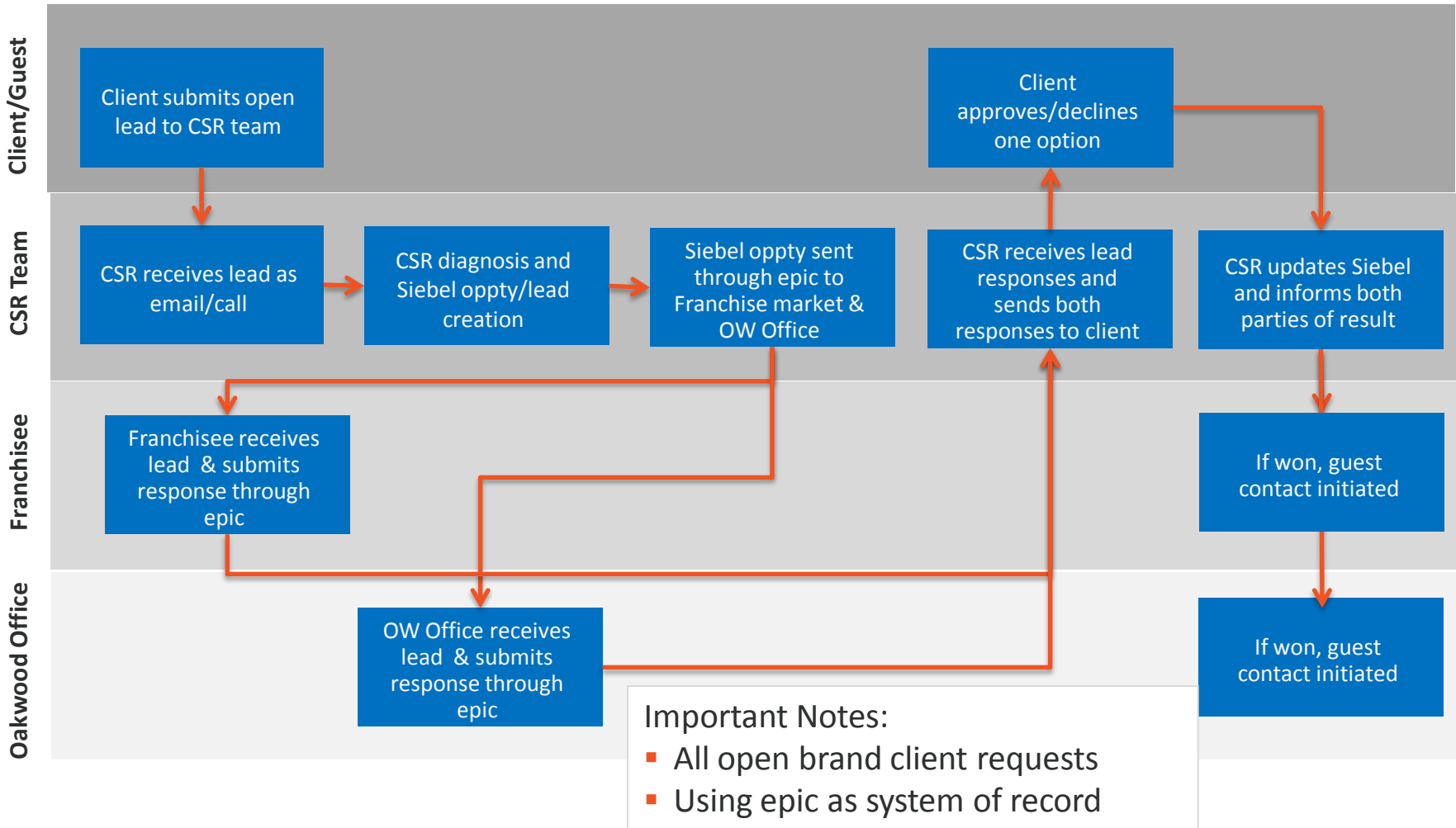   - Measureable success and improvement metrics

2. **Consolidate all requests with selected accounts through Oakwood CSR program (EBC/GAMC)**
   - Eliminates multiple sources of lead flow
   - Develops common system of record to analyze trending (epic, Siebel)
   - Increased controls over lead flow generation and execution

One consistent client lead flow source from Oakwood Worldwide with the ability to track and measure growth

Updated Client Lead Flow Process (Nov-Dec 2012)

Client/Guest

Client submits open lead to CSR team

Client approves/declines one option

CSR Team

CSR receives lead as email/call → CSR diagnosis and Siebel oppty/lead creation → Siebel oppty sent through epic to Franchise market & OW Office

CSR receives lead responses and sends both responses to client

CSR updates Siebel and informs both parties of result

Franchisee

Franchisee receives lead & submits response through epic

If won, guest contact initiated

Oakwood Office

OW Office receives lead & submits response through epic

If won, guest contact initiated

Important Notes:
- All open brand client requests
- Using epic as system of record

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Discussions

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