



Clarusway Project : Cruise Holiday

Cruise Holiday Agent

We are **Triforcia Cruise Holiday agents** and we maintain our business with the website, email, excel sheets, and phone calls. Our current environment has some problematic aspects and we also want to improve our previous processes.

We decided to use a CRM system to improve our business process efficiency and offer our customers (or expected customers) an effective way to interact with our company. We have heard about Salesforce and we want to move or transform our company processes into Salesforce from scratch.

What we are doing?

We are offering similar services to our customers as the hotels offer. Our customers can book a room on a ship. They can attend standard events on the ship. Also, they can attend specific events as well with extra costs.

Since our ships are mobile, we can also offer some route-specific activities based on the route of the voyage.

About The Ships

We are not the owner of the ships. We have an agreement with the ship owners, and we have different contracts and agreements on the ships. This makes some processes very complex for us. We hope we can find a solution in Salesforce to fix these problems. As an agent, we contact the customers and book the ships. However, some of the services on the ships and our commissions vary. So, complex calculations need to be set for each situation.

Varieties of Services

We are booking cruise ships that we don't own ourselves. These ships have different features and different events based on the routes. Cruise ship meal and drink services are free for all customers.

We are not only booking cruise ships. We rent some sailing yachts, motor yachts or gulleys also. This makes our daily jobs very tiring and we need some process to handle these different ship types more easily. These yachts and gulleys have limited capabilities and features, and different routes are designated for sailing. Their meal and drink services can be self or additional paid.

How We are Working Right Now?

We are advertising our websites and phone numbers on specific advertising programs such as TV, radio, internet, etc. When customer candidate calls us or we contact them by any method, we collect some specific information and customers' additional wishes.

We initially collect the below data. However, this may be extended according to the conversation.

- Destination
- Activity
- How many people will attend from the same family
- Ages of every attendee
- Health status (any disability, heart attack risk, medical needs, etc)
- Weights
- Religion
- Diet type (about religion or vegetarian status)

- Voyage Type (Cruise, or Yachts)
- Meal and drink service selection (self, paid, or free)
- Voyage Days
- Specific days of the customers (and their family members on board) such as birthdays, wedding anniversaries, etc.
- Marriage proposal needs

After we collect the above information we tell our customers that we will turn back to them to offer them what they need specifically. So, internal work and turning back is taking some time. Sometimes this delay causes us to lose customers. If we can improve this system and respond to our customers instantly we can onboard more customers and earn more. In the legacy system, most of the time, when we close the phone and when we try to call back after internal work, we can't reach customers again. Even if we can reach them, usually we find the customers in a different mindset. Either they are requesting additional features or asking additional questions. As a result, we are having back and forth phone calls. Eventually, this makes pain in our back.

When customers book any of the ships (cruise or yacht), we will receive the %20 of the payment and the rest of it will be paid during the onboarding. If our agreement is different with the ship owners, we will handle this later in the voyage. If we need to get %30 we will get the rest of this commission. Our minimum commission is %20. If customers buy some specific events on the voyage this is also will be added to our income. We track these payments with our representatives. Customers might buy something from the ship or they might buy at the middle destination. All of these variables are specified in our contracts between us and ship owners.

If customers have any urgent health problems that need medical transport, we will handle this from the closest heliport or other means of transportation. Hospital treatments are covered by insurance. This may be the result of transferring the customer from ship to hospital and after the treatment from hospital to the ship or home. At this point, we arrange this according to the situation.

(Flow can calculate the days and destinations and update the stages daily - picklist stage and path can be the ship stations)

Voyage days can be 7 or 14 days for cruise holidays, and over 7 days for sailing yachts, gulleets, or motor yachts. We are using a manual system to track our cruise ships or

yachts. If there is any medical transport, we have some trouble finding suitable transportation because of the current position calculation. First, we try to calculate the position of the ships then we try to find a suitable hospital for our customers' needs. Then we arrange the transport.

If ships have any technical problems we have no responsibility. But if this problem cannot be solved quickly by the ship owners company, we have to transfer customers from one ship to another or compensate this for suitable way according to our contract between us and our customers.

If the customer requests any specific events such as a marriage proposal, birthday party, anniversaries, etc we organize it and it will happen on the voyage. If customers' specific days such as birthdays, wedding anniversaries, etc. are between the voyage duration and customers didn't request any special event, then we will arrange a surprise celebration on the ship. If it is not during the voyage we want to celebrate this after their holiday. We want to create a strong customer relationship. Celebrating customers' special days are a one way to create this bond. If you have any other suggestions to improve relations that would be great.

Our Crew Member on Agent

Managers

CEO : Maggie Mendoza

VICE CEO: Caroline Mcdaniel

Booking and Contract Workers

Cruise Booking 1 : Dominic Mccoy

Cruise Booking 2 : Tyler Lopez

Other Yachts Booking : Melody Watts

Some Business Process

Responsibilities of creating the contract between ship owners and us have to be prepared in detail. The contract must have extensive details such as ship length, guest capacity, etc. We have to prepare the contract for every ship. Authorizations about contracts mostly focus on our company's financial inputs and outputs. Because of that, we distribute the authorization according to this aspect. We want this process on CRM

as well. We don't want any duplicate active contracts of the same ship. We can track the active and passive contracts as well.

Agreements between Shipowners and our company

For yachts contract, authorization is designated by guest capacity and commission rate.

If guest capacity is lower than 15 and the commission rate is over 25 % **Booking and Contract Workers are authorized to** sign an agreement.

If guest capacity is lower than 15 and the Commission rate is over 20 % at least one of the **Managers must accept** this before signing the agreement.

If guest capacity is over 16 and Commission rate is over 20 % at least one of the **Managers must accept** this before signing the agreement.

For cruise ships' contracts, authorization is designated by guest capacity, commission rate, additional income events, and medical features.

If Guest Capacity is over 4000, additional income available, medical available **Booking and Contract Workers are authorized to** sign an agreement.

if Guest Capacity is over 4000, additional income is not available, medical available **VICE CEO is authorized to** sign an agreement.

if Guest Capacity is over 4000, additional income is not available, medical is not available **CEO is authorized to** sign an agreement.

if Guest Capacity is below 4000, additional income available, medical available **VICE CEO is authorized to** sign an agreement.

if Guest Capacity is below 4000, additional income is not available, and medical available **CEO is authorized to** sign an agreement.

if Guest Capacity is below 4000, additional income is not available, medical is not available **CEO is authorized to** sign an agreement.

These are the contracts between the ship owners and us.

So we need some contract between our customers and us as well.

Agreements Between us and Customers

For yachts;

If our customer has some medical problems and needs marriage proposals, the **VICE CEO is authorized to** sign an agreement.

If our customers have no medical problems and need marriage proposals, the **VICE CEO is authorized to** sign an agreement.

If our customers have no medical problems and no need for marriage proposals, **Booking and Contract Workers are authorized to** sign an agreement.

For cruise ships;

If our customer has some medical problems and needs marriage proposals, the **CEO is authorized to** sign an agreement.

If our customers have no medical problems and need marriage proposals, the **VICE CEO is authorized to** sign an agreement.

If our customers have no medical problems and no need for marriage proposals, **Booking and Contract Workers are authorized to** sign an agreement.

Other Processes

All medical operations must be approved by the **CEO**. Because these events cost more and need more organizational skills.

All marriage proposal events must be applied by the **VICE CEO**.

All of the other agreements must be approved by the **CEO** such as the helicopter agreement.

What we Need

- ☐ We have excel sheets of data to upload to the new CRM system. But this must be cleaned first. Because some of the data is not recorded well.
- ☐ We need organized data. When our agents contact a customer, they must see everything on the screen.
- ☐ Ships must be organized.
- ☐ Contracts must be organized between us and ship owners, customers, helicopter agencies, etc.

- ☐ Contracts must contain detailed information such as ship owners, customers, helicopter agencies, hospitals, ship information, destinations, guest capacities, additional income sources, etc.
- ☐ Any time-dependent specific events must be assigned as tasks.
- ☐ The appearance of the pages and style must be user-friendly and workers can focus mostly on their jobs.
- ☐ Yacht users can't see cruise ships, cruise users can't see yachts if they don't share this information on CRM.
- ☐ We want dashboards and see the financial and marketing stuff on the charts.
- ☐ Dummy tasks must be handled by the systems so we can only focus on our customers.
- ☐ We want an easy way to medical transportation and marriage proposal event organization. These two tasks can take more time and money. We need cost-effective methods for the time and money aspects.
- ☐ All of the collected data from the customers are helpful for us to select ships and routes.