

# TravelEase: A Salesforce-based Travel & Tourism

Customer Relationship Management System

## PHASE 1

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### 1. Requirement Gathering

**Goal:** Understand what each stakeholder needs from the system.

- **Travel Customers:** Easy package inquiry, booking confirmation, payment status, and feedback submission.
  - **Travel Agents:** Manage assigned leads, update booking status, access package inventory.
  - **Travel Managers/Admins:** Monitor sales, revenue, agent performance, and customer satisfaction in one place.
  - **Marketing Team:** Capture leads from website/social media and run targeted campaigns.
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### 2. Stakeholder Analysis

**Goal:** Identify roles and responsibilities in the travel ecosystem.

**Primary Stakeholders:**

- **Customers** → Submit inquiries, book packages, share feedback.
- **Travel Agents** → Manage leads, bookings, and follow-ups.
- **Managers/Admins** → Oversee sales performance, packages, and agent productivity.

**Secondary Stakeholders:**

- **Salesforce Admins** → Configure, automate, and maintain CRM workflows.
  - **Finance/Accounts** → Track payments and settlements.
  - **Marketing Team** → Leverage lead and booking data for campaigns.
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### 3. Business Process Mapping

**Goal:** Compare current travel booking practices vs. Salesforce-enabled improvements.

**Current Process (Manual/Traditional):**

- Leads captured manually via calls, emails, or Excel sheets.
- Bookings confirmed manually → prone to delays.
- Limited tracking of agent performance.

- Customer follow-up often missed → lost opportunities.

#### **Proposed Process (Salesforce Enabled):**

- Leads auto-captured from website/social media → stored in Salesforce Leads.
  - Leads converted into **Opportunities** tied to **Travel Package (Custom Object)**.
  - Automated booking confirmation via **Flows + Email/SMS Alerts**.
  - Dashboards for package sales, agent performance, and monthly revenue.
  - Post-trip **feedback surveys** for continuous improvement.
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### **4. Industry-Specific Use Case Analysis**

**Goal:** Benchmark CRM use cases for travel agencies.

- **Lead Conversion**
    - Problem: Leads lost due to no structured follow-up.
    - Solution: Automated **lead assignment & reminders** in Salesforce.
  - **Package & Booking Management**
    - Problem: Inventory updates not visible to agents/customers.
    - Solution: Custom **Travel Package Object** linked with Opportunities & Bookings.
  - **Customer Feedback**
    - Problem: Feedback collection inconsistent.
    - Solution: **Salesforce Surveys** to capture post-travel reviews.
  - **Revenue Tracking**
    - Problem: No consolidated sales reports.
    - Solution: Salesforce **Dashboards** showing agent-wise and package-wise revenue.
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### **5. AppExchange Exploration**

**Goal:** Identify Salesforce apps to accelerate development.

- **Notification Apps** → SMS/Email booking confirmations.
- **Survey Apps** → Post-travel customer feedback collection.
- **Payment Gateway Connectors** → Stripe, Razorpay for booking payments.
- **Marketing Automation Tools** → Social media and email campaign apps.