

**Hapai development examination report:
for a newly established travel agency**

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Customer Retention in Tourism Industry

Customer retention is the strategic process to maintain the long-term relationships between customers and business for customers' loyalty Sharma et al. (2023). It enhances profitability by increasing purchases and reducing customer churn, which is critical in the competitive tourism sector. It enables customer relationship management (CRM) data to strengthen customer trust and emotional connection to the brand So et al. (2023).

Customer retention is critical in the tourism industry due to its competitive bringing. High retention rate reduces customers' costs and businesses' profitability. CRM systems play a key role by enabling personalized interactions and services, thereby, it strengthen long-term relationships. Sharma et al. (2023) emphasize that the effective CRM strategies enhance retention by leveraging data.

The strategies in tourism include personalized communication and proactive service recovery. Proactive activities through social media campaigns and travel inspiration content ensures customers' connecting to the brand. J. Kim et al. (2023) highlight that loyalty programs, supported by CRM analytics, significantly enhance retention by emotional attachment. Shafiee et al. (2023) note that over-reliance on automated CRM causes risks lacking empathy and reducing retention effectiveness.

Building Relationships with Customers

Building trust-based relationships is key to customer retention. It focuses on long-term emotional and behavioral loyalty rather than just transactions. The quality of the relationship between a customer and a business directly affects customer satisfaction and repeat purchase intention Barusman, Rulian, and Susanto (2019). For travel agency websites, the priority should be leveraging CRM systems to systematically build and deepen customer relationships from every interaction, focusing on mutual, long-term partnerships rather than short-term sales.

Comprehensive Customer Data Integration and Segmentation

Description: This forms the infrastructure of relationship building. The CRM system must act as the central data hub—collecting, integrating, and analyzing customer data from all touchpoints such as website activity, purchase history, email interactions, social media engagement, and customer service records. These data points help build a 360-degree view of each customer. Segmentation should consider both psychographic factors (e.g., values, lifestyles) and behavioral patterns (e.g., spending habits, travel preferences).

Importance: Deep customer understanding is the prerequisite for all personalization and relationship-building efforts. As M. Singh (2017) noted, a core function of CRM is "to know and identify the customer." Without accurate customer profiles, communication efforts are essentially blind. Precise segmentation enables travel agencies to practice "customer selectivity," tailoring marketing strategies and resource allocation to different customer groups instead of using a one-size-fits-all approach. For instance, luxury packages can be promoted to high-value clients, while cost-effective options are offered to occasional travelers Liao, Yang, and Wu (2023). This precision increases marketing effectiveness and helps customers feel understood—laying the first step toward lasting relationships.

Hyper-Personalized Website and Communication Experiences

Description: With deep customer insights in hand, the next step is to provide hyper-personalized experiences at every touchpoint. Websites should dynamically adjust content, such as personalized greetings ("Welcome back, Mr. Wang! Ready for your next island getaway?"), exclusive offers based on loyalty level, or customized emails, texts, and app notifications Casaca and Miguel (2024).

Importance: Personalization is the most powerful expression of customer relationships. It signals, "We know you and value you," boosting perceived value and business returns Othman, Hashim, and Abdul Aziz (2025). Nguyen, Tan, Nguyen, Nguyen, and Ting (2024) found that in hospitality, organizations using CRM-driven personalization saw up to a 600% increase in cam-

paign conversion rates. In an age where consumers expect tailored experiences, personalization isn't just a competitive edge—it's essential to meeting customer expectations.

Offering Incentives

If building relationships is the foundation of customer retention, then incentives are the catalyst that drives repeat visits and deepens loyalty. Well-designed incentive programs effectively shape customer behavior by increasing their “switching costs,” making them more likely to stay with a brand rather than switch to competitors Lian and Kim (2021). In a competitive market like tourism, they are often seen as the “price of entry.” According to Solutions (2017), 58% of travelers consider loyalty programs when making travel decisions.

Implementing Tiered Loyalty Programs

Description: This is a structured membership system where the CRM automatically assigns customers to different tiers (e.g., Bronze, Silver, Gold, Platinum) based on their spending, purchase frequency, or level of engagement. Higher tiers offer more exclusive benefits such as better discounts, priority booking, free upgrades, and dedicated customer service.

Importance: These programs tap into customers' desire for status, achievement, and exclusivity. The appeal of better perks encourages customers to concentrate their travel spending with a single agency to attain higher tiers Rahman (2022). In a study on hotel loyalty programs, Tanford (2013) found that behavioral loyalty—measured by the percentage of nights booked with a preferred brand—increased significantly with tier level: 53% for basic members, 66% for mid-tier, and 78% for elite members.

Provide Personalized and Flexible Rewards

Description: Travel agencies should leverage CRM data to offer rewards that are highly relevant to individual customers. This approach aligns with the concept of “fourth-level loyalty programs,” where incentives are customized based on a customer's purchase history Chetty (2020). For exam-

ple, if the CRM identifies a customer as a family traveler, the agency could offer a complimentary upgrade to a family suite on their next booking. Meanwhile, for a solo traveler with a passion for adventure, a free guided hiking experience could be an ideal reward.

Importance: Personalized rewards are far more impactful than standard discounts. They show that the agency truly understands each customer's lifestyle and preferences, reinforcing the emotional connection between the customer and the brand. This signals that the agency is adapting to the customer—rather than forcing the customer to adapt to a rigid system—which in itself is a powerful tool for relationship maintenance Othman et al. (2025).

Experiential Rewards and Incentive Travel

Description: For top-value clients, offering non-material, unique “money-can’t-buy” experiences is the ultimate loyalty strategy. The most exclusive form is incentive travel—an all-expenses-paid, carefully curated travel experience Whalen and Bowen (2017).

Importance: Compared to cash, travel rewards deliver much stronger emotional impact. While cash is quickly spent and forgotten, a memorable travel experience creates lasting, emotionally-charged brand associations. Rose (2025) noted that 100% of “best-in-class” companies (with the highest retention and growth rates) use group travel as an incentive. The goal is to make top clients feel deeply valued and emotionally connected to the brand, beyond mere transactions Huang, Wang, and Lin (2022).

Keeping Customers Engaged

In tourism industry, customer interaction is challenged by low purchase frequency—months or even years may pass between trips. This “quiet period” is when customer relationships are most vulnerable, and brands risk being forgotten or replaced Huang et al. (2022). Maintaining meaningful engagement during these gaps is crucial for retention.

Systematic Post-Trip Follow-Up and Feedback Loops

Description: CRM systems should automatically initiate a structured communication sequence post-trip, typically including: (1) “Welcome Home” email shortly after return, (2) Thank-you message with a feedback survey. (3) User-generated content (UGC) invitation to share photos or stories on social media using a branded hashtag.

Importance: These simple actions convey a powerful message: the agency cares about the entire journey, not just the sale. This builds trust Della Corte, Sciarelli, Cascella, and Del Gaudio (2015). Feedback also provides invaluable insights for improving service quality Y. Kim and Kim (2022). Moreover, UGC serves as compelling social proof. Xu et al. (2021) found that customers trust UGC far more than brand-produced content.

Fostering Online Brand Communities

Description: Create a dedicated online community—on the agency’s website or social platforms—where past and future travelers can interact, share tips, post reviews, ask questions, find travel buddies, and communicate directly with staff. Importance: Online communities are powerful incubators for deep brand loyalty. They foster a sense of belonging and shared emotion that transcends commercial ties. Community interaction strengthens trust and commitment Guan, Chen, Liu, Liu, and Wu (2022). A well-run, high-quality community makes users loyal to the platform, which eventually translates into brand loyalty. In this way, a fragmented customer base can become a cohesive, active, and deeply loyal brand tribe Bui, Jeng, and Lin (2014).

Addressing Customer Concerns

This process involves resolving complaints and offering recovery measures to restore trust, the manager tracks issues and response consumed time for simplifying the processes by CRM systems. The efficient services recover relationships and elevate customers’ satisfaction, and it drives more perches, then, it mitigates the negative historic experiences Trebicka and Tartaraj (2023b).

Addressing the concerns of customers is critical in this industry. The positive experiences can cause the sector thriving, while unsolved concerns might lead to negative development, impacting reputation, and then the income of the businesses. Researchers indicate the effective complaint processing enhances the trust and retention of customers. For example, Homburg, Fürst, and Koschate (2010) found that proactive resolving concerns improves customers' satisfaction significantly in service industries.

The strategy of this process includes proactive communication, response with empathy, and an efficient system. Enabling several touching points for customers ensures seamlessly touching across online and physical access. Moreover, to train staffs to exhibit empathy and sensitive is also critical. Researchers highlight that the strategies include personalized apologies and restore customers' confidence T. Kim, Kim, and Kim (2014). Additionally, leveraging information technology, such as CRM systems enabling tracking and analyzing concerns to ensure the customer-centric approach.

However, the tourism industries face several challenges. Staff turnover and seasonal workloads threats the consistent quality the services, which disrupts the concerns resolution. Cultural misunderstandings between servants and tourists from different countries might escalate the complaints. Moreover, the small tourism businesses with limited resources constraint the investment in the systems to manage complaints. Chang, Khan, and Tsai (2012) emphasize that the ineffective communication can exacerbate customers' dissatisfaction during the process. These challenges influence the solutions significantly for diverse contexts in tourism.

Businesses prioritize concern resolution can enhance customers' loyalty, which leads to positive reviews and revisits online, it is critical in the digital age. The robust systems for collecting feedback allow tourism managers to figure out service opportunities to improve. Liu, Zhang, and Keh (2017) suggest that the effective response to the complaint causes higher customer lifetime value. Focusing on concern resolution will outstand the businesses in current competitive environment.

To optimize the process of concern resolution, tourism businesses should adopt several ap-

proaches. Firstly, staff training for enhancing problem-solving skills is the valuable investment. Secondly, to implement a real-time feedback mechanism is critical, such as using mobile applications to handle the instant complaints. Thirdly, to establish a clear protocol to recover the service, including a prompt system to empower the customer service staff. Sparks, So, and Bradley (2016) highlight that proactive complaint handling can mitigate negative effects. Finally, data analysis of concern regularly identifies trends, ensuring consistent customer satisfaction and loyalty.

Providing Quality Products or Services

It involves well-designed travel plans based on customers' requirements from CRM system, ensuring consistent and reliable expectations. High-quality services and products leads to customer satisfaction and encourages repeat purchases So et al. (2023).

Quality products and services is fundamental to customer retention in the tourism industry, because the customer satisfaction relies on memorable and reliable experiences. The perfect travel itineraries influences customers' loyalty and repeat purchases. It also enhances brand reputation, encouraging positive word-of-mouth in an industry. The well-designed CRM systems enable tourism agencies to track customers' preferences and feedback, ensuring expectations. So et al. (2023) emphasize that the quality of service significantly boosts retention by robust trust in tourism.

By leveraging CRM data to customize products and services ensures service consistency. The strategy also includes investing employee training. The high quality travel packages rely on the data analysis of CRM systems. The consistent services' quality depends on standardized processes, while training ensures employees' service with empathy and efficacy. Plus, regular assessments supported by CRM tools identify the improvement of the work. R. Singh et al. (2023) emphasize that aligning service delivers customers' expectations by CRM powered insights and retention in the hotel sector.

The challenges of delivering quality products and services are variety, such as costs, wide-range expectations from customers. Small travel businesses might struggle with investment. Diverse

customer preferences is also a threat for the agencies, especially in across cultural markets. The services depending on external partners, like airlines or local guides, can bring more inconsistencies and unexpected events. Trebicka and Tartaraj (2023a) note that the inconsistent service due to third-party involvement, which can undermine retention efforts.

High-quality products and services lead to long term customer lifetime value and competitive advantage in the markets. Businesses can refine offerings to meet the demands and reduce customer churn. It also can enhance positive reviews online, it is critical for attracting new customers in this digital ages. The CRM powered personalized resources allocation is effective to catch high-value clients. Devesa et al. (2023) suggest that quality based retention enable tourism agencies to establish the sustainable customer relationships and elevate the profitability.

Tourism agencies should integrate real-time feedback sentiment analysis of CRM to monitor service quality and customer satisfaction. The investment for employees deliver consistent and empathetic service is also critical. Using CRM system to integrate the reliable third-part services is also the effective way for tracking staffs' performance. Updating travel products based on CRM insights, like emerging trends. Kumar et al. (2023) suggest to leverage CRM to align service quality with customers' expectations for long-term retention in tourism.

Salesforce CRM Evaluation

In the competitive marketing of the travel sector, retaining customers is critical to ensure sustained business to grow and earn more increasingly. Learning Salesforce CRM systems, these travel agencies can elevate their customers' retention by address the key aspects of the customers' experience strategically.

This evaluation focuses on five critical criteria: building strong relationships between customers and businesses for customers' loyalty, offering personalized rewards to encourage repeat purchases, addressing customers' concerns instantly to establish trust, keeping customers engagement and relevant interactions by social media or in person, and providing high-quality products and services to meet customers' expectations.

Sales Automation

Sales automation streamlines the sales process by repeating tasks automatically, management, and providing insights powered by collected data to enhance interactions with customers. It base on Sales Cloud and can be used to optimize the booking process for a travel agency, it also personalize the travel offerings to improve retention.

For building relationships with customers, travel agencies can maintain the profiles of customers with data from travel preferences, historic bookings and interactions by Sales Automation. This allows the salesman to personalize the travel packages and forster stronger relationships. For instance, Sales Cloud can follow-up emails with customized travel suggestions based on the history of customers' activity Salesforce (2025d).

Automation tools, such as Revenue Cloud, can generate renewal quotes or special discounts for loyal clients, which **offers incentives** for the existed customers. The methods includes discounted group tours or exclusive deals for travelers who frequently orders services, which encourages repeat booking Salesforce (2024b). Sales automation supports the customer-interesting campaigns such as demonstrating specific destination, to keep their customers engaged with the agency. It also send follow-ups with relevant travel plans automatically for **keeping customers' engagement** Salesforce (2024a). The pipeline management of Sales Cloud and insights powered by Einstein AI allow sales reps to identify and address customers' hesitations quickly, the factor, such as pricing concerns, offers tailored solutions or alternative options which significantly **address customers' concerns** Salesforce (2024a). The booking trends are predicted by AI, so, sales teams can recommend **higher-quality services** and more relative travel packages based on these trends, which aligns with customers' preferences and elevates customers' satisfaction Salesforce (2025d).

The strengths includes enhancing sales reps to focus on relationships building for better **efficiency**, improving customers' satisfaction to meet **personalized** requirements by providing unified customer profiles, providing the scalable Sales Cloud to support increased bookings without extra efforts in technics Salesforce (2025d).

While its weaknesses is also a consideration. Firstly, to configure Sales Cloud for the specific

agency requirements will cost more time and expertise workloads, which delays implementation potentially due to its **Initial Setup Complexity**. Secondly, the effective recommendation system depends on clean and accurate data, low-quality data by poor management will cause to irrelevant results, which means **Poor Data Quality** is a negative factor in this scenario Salesforce (2025b).

Marketing Automation

Salesforce Marketing Cloud enables travel agencies to build specific targeted and personalized campaigns across email, social media etc. to boost customers' retention.

Marketing Cloud allows agencies to split customers into segments by travel preferences, such as adventure or luxury, it also delivers customized content, like travel guides and fostering stronger connections, for **building a relationship with customers** Salesforce (2025c). Automated campaigns can deliver loyalty programs, such as seasonal discounts and bonus points, for frequent users by these **Offering Incentives**. Drip campaigns can cause inspiration timely based on the activity behavior of customers, which maintains engagement during travelings, it keeps **Customers' Engagement** continuously. Marketing automation ensures frequent messaging about travel experiences with high-quality feelings by recommended destinations or packages from AI Salesforce (2025c). The analysis powered by AI can figure out low engaged customers, then, the system lunches re-engagement campaigns by special offers or surveys for **Addressing Customer Concerns** Salesforce (2024a).

The strengths include AI-generated content for engaging marketing, by supporting email, social media and mobile messaging to maximize customer touching, providing insights for increasingly improvement.

While the weaknesses needs be treated carefully. Firstly, Marketing Cloud's features requires training, which might cause challenges for smaller agencies. Secondly, the AI usage might enhance costs, which impacts the agencies who care about the budgets.

Service Automation

Service automation relies on Salesforce Service Cloud, which streamlines the processes supporting customers, ensuring instant resolution for issues and proactive engagement for retention.

The omni-channel support of Service Cloud provides a comprehensive approaches for customers' interactions, such as phone, email, and social media, enabling personalized service to **build a relationships with customers**. Automated workflows of this cloud can triggers loyalty rewards by **Offering Incentives**, like updated programs or travel credits. The AI chatbots provides 27/7 supporting service by answering common questions to **keep customers engagement**. Agencies can ensure consistent and good-quality traveling experiences by integrating service data with marketing Salesforce (2023). This cloud also allow agencies to track and resolve issues faster based on AI suggesting solutions figuring out form past cases. It is improves customers' trust by **addressing customers' concerns** Salesforce (2024a).

The strengths include that AI agents handles routine queries from customers, which allows human working for this to focus on complex issues.

While its weaknesses including interaction challenging, such as connecting this cloud with existing systems causing expertise workloads, and overused AI might causing customers feeling frustrate and seeking human agent for next interaction.

Privacy and Security

The robust and security features of this system building a architecture ensure customers' data under well protected, it is critical for building trust and retention in travel industry.

Treating data securely builds trust due to customers feeling confident to share their personal content, such as passport information or bank account information, which means that the agencies have a chance to **build a trust relationship with customers**. Agencies can propose the trust-based incentives, such as secure booking guarantees, for **offering incentives**. Transparent privacy policies encourage ongoing engagement supported by Salesforce's Data Cloud. Compliance with GDPR and other regulations **addresses concerns** about data security, reduce clients churn. The

systems ensure reliable processes supporting booking by contributing high-quality services Salesforce (2025e).

The strengths include the robust architecture and its automatic updating to protect user data, it also includes tools like DataGuard Insights and Zero data retention to ensure privacy to support long-term customer relationships. While the weaknesses include complex compliance and initial cost for setting up and training.

Analytics

Salesforce's Tableau provides advanced analysis for actionable insights by using customer's data, which enables travel agencies to make decisions depending on data for retention.

This analytics system provides dashboards for data visualization for demonstrating customers' preferences and booking patterns, it allows agents to customize interactions. High-value customers are identified by analytics to target loyalty programs, such as providing exclusive travel discount for frequent users. Agencies can identify low-activity customers by analyzing engagement metrics to **keep customers engagement**. The predictive analytics can dig out potential issues to address concerns proactively Tableau (2025).

The strengths include interactive dashboards for real-time insights to drive decision-making, AI-driven improvement of retention strategies, and interactions with Service Cloud seamlessly. On the other hand, weaknesses include higher training costs and misleading insights by inaccurate data.

Customer Data Platform

Salesforce Data Cloud standards customers' data by channels and provides the single source of data for personalizing experiences and improving retention.

Data Cloud collects data from business activities, such as bookings, interactions and preferences, enabling higher customize recommendations for travelers. The real-time data triggers personalized incentives, for example, the last deals brings specific destinations. Standard data enables

consistent, relevant communication across every situation, which **keeps customers engagement**. The insights based on these data also allow agencies to identify and resolve issues quickly, such as booking errors, to improve trust Salesforce (2025a).

The strengths involve real-time insights enabling immediate action on customer behavior and agency expands by growing data volumes. The interactions complexity and the subscription cost are weaknesses of this system, which impacts budgets limited agencies.

Existing Technologies Evaluation

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