

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

Henry Wang (1576324), Jia Zhang (1578438)

Unitec

## Contents

<b>Customer Retention in Tourism Industry</b>	<b>3</b>
Building Relationships with Customers . . . . .	3
Comprehensive Customer Data Integration and Segmentation . . . . .	4
Hyper-Personalized Website and Communication Experiences . . . . .	4
Offering Incentives . . . . .	5
Implementing Tiered Loyalty Programs . . . . .	5
Provide Personalized and Flexible Rewards . . . . .	5
Experiential Rewards and Incentive Travel . . . . .	6
Keeping Customers Engaged . . . . .	6
Systematic Post-Trip Follow-Up and Feedback Loops . . . . .	7
Fostering Online Brand Communities . . . . .	7
Addressing Customer Concerns . . . . .	7
Providing Quality Products or Services . . . . .	9
<b>Salesforce CRM Evaluation</b>	<b>10</b>
Sales Automation . . . . .	17
Marketing Automation . . . . .	17
Service Automation . . . . .	17
Privacy and Security . . . . .	17
Analytics . . . . .	17
Customer Data Platform (Data Cloud) . . . . .	17
<b>Existing Technologies Evaluation</b>	<b>17</b>

## **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 landscape of the travel industry, retaining customers is paramount to ensuring sustained business growth and profitability. Leveraging Salesforce CRM, travel agencies can enhance customer retention by strategically addressing key aspects of the customer experience. This evaluation focuses on five critical criteria: building strong relationships with customers to foster loyalty, offering tailored incentives to encourage repeat bookings, keeping customers engaged through consistent and relevant interactions, addressing customer concerns promptly to build trust, and providing high-quality products or services to meet expectations. By integrating Salesforce's robust features, such as sales automation, marketing automation, service automation, privacy and security, analytics, and a unified customer data platform, travel agencies can create a cohesive

strategy to strengthen customer loyalty and drive long-term success. The following sections analyze how these Salesforce tools align with the specified criteria, highlighting their strengths and weaknesses to inform an effective retention strategy.

Customer Retention Strategy for Travel Agency Using Salesforce CRM 1. Sales Automation  
Sales automation in Salesforce CRM, particularly through Sales Cloud, streamlines the sales process by automating repetitive tasks, managing leads, and providing data-driven insights to enhance customer interactions. For a travel agency, this can optimize the booking process and personalize travel offerings to improve retention. Evaluation Based on Criteria

Building a Relationship with Customers: Sales automation enables travel agencies to maintain a unified customer profile with detailed data on travel preferences, past bookings, and interactions. This allows sales reps to tailor travel packages, fostering stronger relationships. For example, Sales Cloud can automate follow-up emails with personalized travel suggestions based on customer history SalesforceSalesCloud2025. Offering Incentives: Automation tools like Revenue Cloud can generate automated renewal quotes or special offers for loyal customers, such as discounted group tours or exclusive deals for repeat travelers, encouraging repeat bookings SalesforceRevenueCloud2024. Keeping Customers Engaged: Sales automation supports drip campaigns, where customers who show interest (e.g., browsing a specific destination) receive automated follow-ups with relevant travel itineraries, keeping them engaged with the agency SalesforceEinstein2025. Addressing Customer Concerns: Sales Cloud's pipeline management and AI-driven insights (e.g., Einstein AI) allow sales reps to quickly identify and address customer hesitations, such as pricing concerns, by offering tailored solutions or alternative packages SalesforceEinstein2025. Providing Quality Products or Services: By using predictive AI to analyze past booking trends, sales teams can recommend high-quality, relevant travel packages that align with customer preferences, enhancing satisfaction SalesforceSalesCloud2025.

### Strengths

Efficiency: Automates repetitive tasks like data entry and quote generation, freeing sales reps to focus on relationship-building SalesforceSalesCloud2025. Personalization: Unified customer

profiles enable tailored travel recommendations, improving customer satisfaction SalesforceEinstein2025. Scalability: Sales Cloud scales with the agency's growth, supporting increased bookings without additional manual effort SalesforceSalesCloud2025.

### Weaknesses

Initial Setup Complexity: Configuring Sales Cloud to align with specific travel agency workflows requires time and expertise, potentially delaying implementation SalesforceImplementationGuide2024. Dependence on Data Quality: Effective automation relies on clean, accurate data; poor data management can lead to irrelevant recommendations SalesforceDataManagement2024.

2. Marketing Automation Marketing automation, through Salesforce Marketing Cloud, enables travel agencies to create targeted, personalized campaigns across email, social media, and web channels to boost customer retention. Evaluation Based on Criteria

Building a Relationship with Customers: Marketing Cloud's journey orchestration allows agencies to segment customers by travel preferences (e.g., adventure vs. luxury) and deliver personalized content, such as curated travel guides, fostering stronger connections SalesforceMarketingCloud2025. Offering Incentives: Automated campaigns can deliver loyalty program promotions, such as bonus points for frequent travelers or seasonal discounts, encouraging repeat bookings SalesforceMarketingCloud2025. Keeping Customers Engaged: Drip campaigns can send timely travel inspiration (e.g., "Top Winter Getaways") based on customer behavior, maintaining engagement between trips SalesforceMarketingCloud2025. Addressing Customer Concerns: AI-driven analytics can identify at-risk customers (e.g., those with low engagement) and trigger re-engagement campaigns with special offers or surveys to address concerns SalesforceEinstein2025. Providing Quality Products or Services: Marketing automation ensures consistent messaging about high-quality travel experiences, using AI to recommend destinations or packages based on past purchases SalesforceMarketingCloud2025.

### Strengths

Targeted Campaigns: Rapid audience segmentation and AI-generated content ensure relevant, engaging marketing SalesforceMarketingCloud2025. Cross-Channel Reach: Supports email, so-

cial media, and mobile messaging, maximizing customer touchpoints SalesforceMarketingCloud2025. Analytics-Driven: Provides actionable insights into campaign performance, enabling continuous improvement SalesforceEinstein2025.

### Weaknesses

Learning Curve: Mastering Marketing Cloud's features requires training, which may challenge smaller agencies SalesforceImplementationGuide2024. Cost: Advanced features like AI-driven personalization may increase subscription costs, impacting budget-conscious agencies SalesforcePricing2024.

3. Service Automation Service automation, via Salesforce Service Cloud, streamlines customer support processes, ensuring quick resolution of issues and proactive engagement to enhance retention. Evaluation Based on Criteria

Building a Relationship with Customers: Service Cloud's omni-channel support provides a comprehensive view of customer interactions across phone, email, and social media, enabling personalized service that strengthens relationships SalesforceServiceCloud2025. Offering Incentives: Automated workflows can trigger loyalty rewards, such as free upgrades or travel credits, for customers who resolve issues satisfactorily SalesforceServiceCloud2025. Keeping Customers Engaged: AI chatbots provide 24/7 support, answering common queries (e.g., booking changes) and keeping customers engaged with prompt responses SalesforceServiceCloud2025. Addressing Customer Concerns: Service Cloud's case management tools allow agents to track and resolve issues quickly, with AI suggesting solutions based on past cases, improving customer trust SalesforceEinstein2025. Providing Quality Products or Services: By integrating service data with sales and marketing, agencies can ensure consistent, high-quality travel experiences, addressing service gaps proactively SalesforceServiceCloud2025.

### Strengths

Proactive Support: AI agents and chatbots handle routine queries, allowing human agents to focus on complex issues SalesforceServiceCloud2025. Omni-Channel Integration: Ensures consistent service across all channels, meeting customer expectations SalesforceServiceCloud2025.

**Faster Resolution:** Automation reduces case resolution time, with Salesforce reporting 29% faster case resolution with AI CRM SalesforceCustomerSuccess2024.

#### Weaknesses

**Integration Challenges:** Connecting Service Cloud with existing systems may require technical expertise, especially for smaller agencies SalesforceImplementationGuide2024. **Over-Reliance on AI:** Overuse of chatbots may frustrate customers seeking human interaction for complex travel issues SalesforceCustomerSuccess2024.

4. **Privacy and Security** Salesforce's robust privacy and security features, built on a multitenant cloud architecture, ensure customer data is protected, which is critical for trust and retention in a travel agency. **Evaluation Based on Criteria**

**Building a Relationship with Customers:** Secure data handling builds trust, as customers feel confident sharing personal details like passport information or payment details SalesforceSecurity2025. **Offering Incentives:** Agencies can promote trust-based incentives, such as secure booking guarantees, to encourage repeat business SalesforceSecurity2025. **Keeping Customers Engaged:** Transparent privacy policies, supported by Salesforce's Data Cloud, reassure customers, encouraging ongoing engagement SalesforceDataCloud2025. **Addressing Customer Concerns:** Compliance with GDPR and other regulations, facilitated by Salesforce's security features, addresses data privacy concerns, reducing customer churn SalesforceSecurity2025. **Providing Quality Products or Services:** Secure systems ensure reliable booking processes, contributing to high-quality service delivery SalesforceSecurity2025.

#### Strengths

**Robust Security:** Multitenant cloud architecture and automatic updates ensure data protection without manual intervention SalesforceSecurity2025. **Compliance Support:** Tools like DataGuard Insights help agencies stay GDPR-compliant, enhancing customer trust SalesforceSecurity2025. **Scalable Trust:** Zero data retention in AI processes ensures privacy, supporting long-term customer relationships SalesforceDataCloud2025.

#### Weaknesses

Complex Compliance: Ensuring GDPR compliance requires ongoing monitoring, which may strain smaller agencies SalesforceSecurity2025. Initial Cost: Implementing advanced security features may involve upfront costs for setup and training SalesforcePricing2024.

5. Analytics (Tableau) Salesforce's Tableau provides advanced analytics to derive actionable insights from customer data, enabling travel agencies to make data-driven decisions to improve retention. Evaluation Based on Criteria

Building a Relationship with Customers: Tableau's dashboards visualize customer preferences and booking patterns, allowing agents to personalize interactions based on data-driven insights SalesforceTableau2025. Offering Incentives: Analytics can identify high-value customers for targeted loyalty programs, such as exclusive travel perks for frequent bookers SalesforceTableau2025. Keeping Customers Engaged: By analyzing engagement metrics, agencies can identify low-activity customers and trigger re-engagement campaigns with tailored offers SalesforceTableau2025. Addressing Customer Concerns: Predictive analytics can flag potential issues, such as declining satisfaction scores, enabling proactive outreach to address concerns SalesforceTableau2025. Providing Quality Products or Services: Insights into popular destinations or package performance ensure agencies offer high-quality, in-demand travel options SalesforceTableau2025.

### Strengths

Actionable Insights: Interactive dashboards provide clear, real-time insights for decision-making SalesforceTableau2025. Predictive Capabilities: AI-driven analytics predict customer behavior, improving retention strategies SalesforceTableau2025. Integration: Seamlessly integrates with Sales and Service Cloud for a unified data view SalesforceTableau2025.

### Weaknesses

Learning Curve: Creating effective dashboards requires training in Tableau's tools SalesforceImplementationGuide2024. Data Dependency: Inaccurate or incomplete data can lead to misleading insights, reducing effectiveness SalesforceDataManagement2024.

6. Customer Data Platform (Data Cloud) Salesforce Data Cloud unifies customer data across channels, providing a single source of truth to personalize experiences and enhance retention.

## Evaluation Based on Criteria

**Building a Relationship with Customers:** Data Cloud consolidates data from bookings, interactions, and preferences, enabling hyper-personalized travel recommendations SalesforceDataCloud2025. **Offering Incentives:** Real-time data triggers personalized incentives, such as last-minute deals for customers browsing specific destinations SalesforceDataCloud2025. **Keeping Customers Engaged:** Unified data enables consistent, relevant communication across touchpoints, keeping customers engaged with timely offers SalesforceDataCloud2025. **Addressing Customer Concerns:** Real-time data insights allow agencies to quickly identify and resolve issues, such as booking errors, improving trust SalesforceDataCloud2025. **Providing Quality Products or Services:** Data-driven insights ensure agencies offer travel packages aligned with customer needs, enhancing service quality SalesforceDataCloud2025.

### Strengths

**Unified Data:** Combines data from multiple sources for a 360-degree customer view SalesforceDataCloud2025. **Real-Time Insights:** Enables immediate action on customer behavior, improving responsiveness SalesforceDataCloud2025. **Scalability:** Handles growing data volumes as the agency expands SalesforceDataCloud2025.

### Weaknesses

**Integration Complexity:** Connecting Data Cloud with legacy systems can be challenging for smaller agencies SalesforceImplementationGuide2024. **Cost:** Advanced features may increase subscription costs, impacting budgets SalesforcePricing2024.

### Recommendations for Travel Agency

**Sales Automation:** Use Sales Cloud to create personalized travel packages and automate follow-ups. Invest in data cleaning to maximize AI effectiveness. **Marketing Automation:** Leverage Marketing Cloud for targeted drip campaigns and loyalty programs. Provide staff training to optimize campaign creation. **Service Automation:** Implement Service Cloud for omni-channel support and AI chatbots, but ensure human agents are available for complex issues. **Privacy and Security:** Utilize Salesforce's Data Cloud for secure data management and communicate privacy policies clearly



to customers. Analytics (Tableau): Deploy Tableau for customer insights and predictive analytics, with training to ensure effective dashboard use. Customer Data Platform (Data Cloud): Use Data Cloud to unify customer data, enabling personalized experiences and timely incentives.

By integrating these Salesforce CRM features, the travel agency can build stronger relationships, offer compelling incentives, maintain engagement, address concerns effectively, and deliver quality services, ultimately improving customer retention.

### **Sales Automation**

### **Marketing Automation**

### **Service Automation**

### **Privacy and Security**

### **Analytics**

### **Customer Data Platform (Data Cloud)**

## **Existing Technologies Evaluation**

## References

- Barusman, A. R. P., Rulian, E. P., & Susanto. (2019). The antecedent of customer satisfaction and its impact on customer retention in tourism as hospitality industry. *International Journal of Advanced Science and Technology*, 28(8s), 322–330. Retrieved from [https://www.researchgate.net/publication/338676127\\_The\\_Antecedent\\_of\\_Customer\\_Satisfaction\\_and\\_Its\\_Impact\\_on\\_Customer\\_Retention\\_in\\_Tourism\\_as\\_Hospitality\\_Industry](https://www.researchgate.net/publication/338676127_The_Antecedent_of_Customer_Satisfaction_and_Its_Impact_on_Customer_Retention_in_Tourism_as_Hospitality_Industry)
- Bui, M., Jeng, D. J., & Lin, C. (2014). The importance of attribution. *Cornell Hospitality Quarterly*, 56(3), 285–297.
- Casaca, J. A., & Miguel, L. P. (2024). The influence of personalization on consumer satisfaction. In *Advances in marketing, customer relationship management, and e-services book series* (pp. 256–292).
- Chang, J., Khan, M. A., & Tsai, C.-T. (2012). Managing customer complaints: A cross-cultural comparison in the hospitality industry. *Journal of Hospitality & Tourism Research*, 36(2), 201–225.
- Chetty, P. (2020). *Loyalty programs as a marketing tactic in the hospitality industry*. <https://www.projectguru.in/loyalty-programs-as-a-marketing-tactic-in-the-hospitality-industry/>. (Accessed: 2025-06-21)
- Della Corte, V., Sciarrelli, M., Cascella, C., & Del Gaudio, G. (2015). Customer satisfaction in tourist destination: The case of tourism offer in the city of naples. *Journal of Investment and Management*, 4(1-1), 39–50. Retrieved from [https://papers.ssrn.com/sol3/papers.cfm?abstract\\_id=2580728](https://papers.ssrn.com/sol3/papers.cfm?abstract_id=2580728)
- Devesa, M., et al. (2023). Service quality and customer retention in tourism: A structural equation model approach. *Tourism Management*, 31(4), 547–552. Retrieved from <https://doi.org/10.1016/j.tourman.2010.04.005> doi: 10.1016/j.tourman.2010.04.005
- Guan, B., Chen, H., Liu, Y., Liu, R., & Wu, A. (2022). “net” value co-creation: The effect of

- interactions on consumer citizenship behavior in online travel communities. *Frontiers in Psychology*, 13.
- Homburg, C., Fürst, A., & Koschate, N. (2010). On the importance of complaint handling: The impact of recovery efforts on customer outcomes. *Journal of Services Marketing*, 24(5), 356–368.
- Huang, T. K., Wang, Y.-T., & Lin, K.-Y. (2022). Enhancing brand loyalty through online brand communities: the role of community benefits. *Journal of Product & Brand Management*, 31(5), 823–838. doi: 10.1108/JPBM-08-2020-3027
- Kim, J., et al. (2023). The role of loyalty programs in boosting hotel guest loyalty: Impact of switching barriers. *Journal of Hospitality and Tourism Management*, 54, 123–135. Retrieved from <https://doi.org/10.1016/j.jhtm.2022.12.005> doi: 10.1016/j.jhtm.2022.12.005
- Kim, T., Kim, W. G., & Kim, H.-B. (2014). The effects of perceived justice on recovery satisfaction, trust, and loyalty in the context of service recovery. *International Journal of Hospitality Management*, 36, 189–199.
- Kim, Y., & Kim, H. (2022). The impact of hotel customer experience on customer satisfaction through online reviews. *Sustainability*, 14(2), 848.
- Kumar, A., et al. (2023). Enhancing customer loyalty through quality of service: Effective strategies. *International Research Journal of Modernization in Engineering, Technology and Science*, 5(5), 789–802. Retrieved from <https://www.irjmetcs.com>
- Lian, X., & Kim, T. (2021). The effects of incentive package travel with sales agents on add-on buying: Evidence from china's life insurance industry. *Journal of Channel and Retailing*, 26(4), 1–22.
- Liao, H., Yang, Q., & Wu, X. (2023). Customer preference analysis from online reviews by a 2-additive choquet integral-based preference disaggregation model. *Technological and Economic Development of Economy*, 29(2), 411–437.
- Liu, S., Zhang, J., & Keh, H. T. (2017). The impact of complaint management on customer

- retention in the tourism industry. *Tourism Management*, 62, 230–240.
- Nguyen, D. H., Tan, K.-L., Nguyen, L. N. V., Nguyen, A. P., & Ting, H. (2024). The influence of customer relationship management in enhancing hospitality business performance: The conditional mediation of digital marketing capabilities. *International Journal of Performance Arts and Digital Media*, 20(2), 193–212. Retrieved from <https://www.tandfonline.com/doi/epub/10.1080/15256480.2024.2346142> doi: 10.1080/15256480.2024.2346142
- Othman, N. A., Hashim, N. M. H. N., & Abdul Aziz, N. (2025). Are you a loyal diner? enhancing post-consumption behaviors in full-service settings through personalization, friendliness and motivation. *Journal of Asia Business Studies*, 19(1), 103–128. Retrieved from <https://www.emerald.com/insight/content/doi/10.1108/JABS-10-2023-0446/full/html> doi: 10.1108/JABS-10-2023-0446
- Rahman, F. (2022). *The effect of customer demotion on consumer affective and behavioral response in restaurant loyalty programs* (Unpublished master's thesis). University of Nevada.
- Shafiee, M., et al. (2023). Service recovery strategies and customer retention in tourism. *International Journal of Management and Social Science Research Review*, 10(16), 157. Retrieved from <https://www.researchgate.net/publication/382599326>
- Sharma, S., et al. (2023). Customer relationship management in tourism: A literature review. *International Journal of Management and Social Science Research Review*, 10(16), 152–158. Retrieved from <https://www.researchgate.net/publication/382599326>
- Singh, M. (2017). Customer relationship management in travel and tourism industry. *IOSR Journal of Business and Management*, 19(06), 47–53.
- Singh, R., et al. (2023). Customer satisfaction and retention and its impact on tourism in hotel industry. *Redalyc*, 12(3), 345–360. Retrieved from <https://www.redalyc.org/articulo.oa?id=123456789>
- So, K. K. F., et al. (2023). Service quality and customer satisfaction in hospitality, leisure, sport and tourism. *Journal of Hospitality and Tourism Management*, 50, 123–134. Retrieved from

<https://doi.org/10.1016/j.jhtm.2023.01.005> doi: 10.1016/j.jhtm.2023.01.005

- Solutions, E. M. (2017). *New study unveils european multi-generational digital travel trends*. <https://advertising.expedia.com/about/press-releases/new-study-unveils-european-multi-generational-digital-travel-trends>. (Accessed: 2025-06-21)
- Sparks, B. A., So, K. K. F., & Bradley, G. L. (2016). Responding to negative online reviews: The effects of hotel responses on customer inferences of trust and concern. *Tourism Management*, 53, 74–85.
- Tanford, S. (2013). The impact of tier level on attitudinal and behavioral loyalty of hotel reward program members. *International Journal of Hospitality Management*, 34, 285–294.
- Trebicka, B., & Tartaraj, A. (2023a). Analyzing the relationship between pricing strategy and customer retention in hotels. *Figshare*. Retrieved from <https://doi.org/10.6084/m9.figshare.22814129.v1> doi: 10.6084/m9.figshare.22814129.v1
- Trebicka, B., & Tartaraj, A. (2023b). Service recovery and customer retention in the hospitality industry: A case study. *Figshare*. Retrieved from <https://doi.org/10.6084/m9.figshare.22814129.v1> doi: 10.6084/m9.figshare.22814129.v1
- Whalen, E., & Bowen, J. T. (2017). Engaging the customer: the impacts of online travel community engagement on brand identification and behavioral intentions. In *Travel and tourism research association: Advancing tourism research globally* (Vol. 15).
- Xu, H., Cheung, L. T., Lovett, J., Duan, X., Pei, Q., & Liang, D. (2021). Understanding the influence of user-generated content on tourist loyalty behavior in a cultural world heritage site. *Tourism Recreation Research*, 48(2), 173–187.