Problem Definition and Objectives

The travel company currently faces difficulties in dealing with differing varieties of holiday packages and the methods used to match clients with RM. Thus, it is necessary to improve the process of matching customers to the best suited RM based on specific factors of both the customer and the RM by creating a more automated system that can more efficiently match customers according to RM performance and product knowledge. In doing so, RM can reduce complications associated with differing holiday packages and reduce costs by decreasing the lead times and servicing times on the phones. Additionally, by suiting a customer to the most appropriate RM, the travel company will likely see an increase in customer turn over due to their needs being better met, which can ultimately have a positive effect on revenue. Another issue for the travel company are long lead times during busy periods in which customers get frustrated and hang up the phone. A system to manage long waiting times for customers will to be implemented. The project aims to develop an improved information system for a travel company which enables a more productive and efficient Call Management System (CMC) which will allow the Relationship Managers (RM) to improve client servicing.

Assumptions:

1. The MP’s currently employed are of sufficient training and skill level required to service customers and perform tasks effectively. The corresponding MP will have adequate knowledge of the travel packages assigned to him/her and can effectively translate this to the customer
2. The MP will be sufficiently informed of the customer’s needs and definitive factors such as name, age, location, previous history with the business
3. The MP provided correct and answers in the 10-minute questionnaire as well as on their resume CV and all other processes in recruitment. On this assumption the business will have sound knowledge of how to distribute tasks, customers and travel packages to the right MP
4. The system will continually track the performance and skillset of each MP and adequately assess and assign them to the most suitable tasks
5. The private branch for inbound calls is adequately trained in warming leads and has the necessary knowledge of MP’s skillsets to send match them with the most adequate customers. Additionally, the MP’s score rating should be based on the correct criteria and should reflect accuracy of the assumed purchase intent

Stakeholders

|  |  |  |
| --- | --- | --- |
| **Stakeholder** | **Interest** | **Influence** |
| Travel Company owner/CEO | High | High |
| Development Team | High | High |
| Relationship Managers | High | Medium |
| Travel Company Hiring Manager | High | Low |
| Customers | Low | Low |
| Other Travel Company Employees | High | Low |