



TAILORED TRAVEL





## Business Overview

Ireland's only luxury travel business Irish Owned & Operated

Sales Revenue €14m 2024 Founded in 2017 by entrepreneurs Bob Haugh & Clive Kilmurray

# **Customer Overview**

61% Female Decision Makers

Average selling price overall is €6-7k per person

Repeat customer books 2-3 holidays per year

Market Segments: Family, Older Couples, Multigenerational Groups



### > Problems to be solved

Business works across 2 main departments Sales and Operations when creating a holiday

- From initial enquiry through to quote we don't have an effective mechanism of creating engaging itinerary that is representative of our brand
- Lack of suitable system to intuitively track the quote and clear CTA for customer across all stages of the customer journey
- Legacy systems managing internal communications around a booking creation clunky task allocation, email communicate with third parties (to get costs, understand availability etc).
- Engagement across departments is ineffective no line of sight for either teams on wider progress of a sale, holiday details (visa, ticketing etc.)
- Lack of clarity for customer customer doesn't know where their booking sits in the process
- Communication with customer doesn't use technology first and is reliant on sales team/operation person having own process and timelines
- No feedback loop for customers





## **Requirements Overview**

## Customer Front End

- UX in all touchpoints must be intuitive, easy to navigate and customer centric (quotes, CTA, itinerary, web interface etc.)
- Design must represent our brand and utilise best in class technology to do this

## **Back End** System

- User interface for the business users must be simple, clear and intuitive
- Design represent the brand ethos for service standards
- Remove all manual work arounds
- Intuitive Content Management System





## **X** Key Functional Requirements for the business

- Effective technology drive process for sales cycle
- o Internal system to allow for the business to service the customer touchpoints professionally -itinerary building, follow ups etc.
- Creation of a staged process removing all possible manual stages -emails to suppliers, internal teams reminders etc.
- Technology driven supports for initial engagement (vital part of sales qualification process) initial call note taking, task creation, intuitive access to relevant destination information etc.
- Effective communication ability between departments. Internal automated task management staged and clearly visible to all involved in the sale (stages of booking, stages of ticketing etc.)
- Central source of approved content imagery, destination information, video etc that is easily searchable, easily updated and approved required for itinerary building, pre holiday planning and marketing purposes
- Reporting that meets Operations, Sales and Finance requirements



## **X** Integration Required

- Customer Relationship Management System for Marketing RADAR https://marketingradar.com/
  - o marketing tasks, customer data, preferences, email marketing etc.
- Other existing integrations to be discussed as to relevance in new process



## **Expected Outcomes**

#### Selected system should:

- Give OROKO technology first driven system to support end to end sales process for the customer and for the business.
- Reduce manual intervention in the sales and operations processes
- Drive efficiency without sacrificing quality, customer service or brand values by releasing resources to focus on customers & grow the business
- Improve sales process success through engaged departmental co ordination and automated processes
- Provide financial (FX etc.) and operational reporting
- Manage supplier contracts & supplier payments aligned to reservations
- Provide a scalable solution to grow with the business and enhance operational efficiencies



# OROKO TAILORED TRAVEL Business Needs & perational Requirements

## **Business Needs**

PRE-QUOTE SALE SALE PRE-TRIP TRIP POST-TRIP						
As a business	As a business	As a business	As a business	As a business	As a business	As a business
we need to understand the customer's needs and provide reassurance that we understand and will deliver on their needs	we need to create an itinerary for the customer based on our experience as a premium travel company, and based on	we need to offer different payment methods	necessary changes to the itinerary  we need to communicate any changes to the customer  customer with all the information that they refor their trip in a way the is easy to read and interact with		we need to be contactable while the customer is away we need to provide the customer with a daily itinerary throughout their trip	we want to welcome the
		we need to provide a receipt for payment		-		we want to know which aspects of the holiday the customer enjoyed the most
we need to be able to capture all the information we need from conversations with the customer so that we can refer to it as we build the itinerary. (intuitive note	availability  we need to provide the customer with a welldesigned, easy to use, interactive itinerary with	we need to help the customer get excited about their holiday		interact with  we need to provide the customer with updates on when they will receive boarding passes etc		
			we need to give the customer all the information they need for their trip in a format that is easy to understand and easy to find specific information they might need		we want to	we want to start the conversation about the next trip
	clear next steps  we need to have emails to DMC and suppliers for rates and availability automatically sent/received & aligned to quote/customer  we want to be able to hold an option of securing flights without the customer finalising the full			we need to provide the customer with their boarding passes in a way that is easy to access		
we need to be able to					we need to communicate any unforeseen changes to the customer	
communicate with the customer			we need to have a copy of a valid passport for all those travelling  we need to confirm or or organise any required visas  we need to be able to communicate with the customer about the documentation we need and any actions they need  we need to provide the customers with any contacts that they might need when they're away  we need to let the customer know who will be picking them up and provide contact details  we need to provide the customers with any contacts that they might need when they're away  we need to provide the customers with any contacts that they might need when they're away  we need to provide the customers with any contacts that they might need when they're away  we need to be to customers with any contacts that they might need when they're away  we need to be to customers with any contacts that they might need when they're away	·	we need to let the customer know driver/partner details for	
We need to store and manage supplier stock (images, details, locations)				, ,		
				each stage of the trip (if applicable)		
	itinerary					
	we need to be able to clone quotes					
			to take	22		

around stages of booking across all departments

## **Comparison Solution**

customer



#### As a member of the business, through our system ... I can capture the customer's needs based on conversations had I can view a detailed outline of the customer's needs based on conversations had I can create an itinerary for the customer based on their needs and availability I can offer the customer the option of securing flights I can send the customer an interactive summary of the holiday I can make changes to the itinerary I can see when the customer has paid the deposit I can see when a customer had viewed my email communication I can make changes to any aspect of the booking I can see what actions are outstanding & in action (e.g. Upload passport) I can provide contact details for the customer for all contacts they need for their trip I can check-in on behalf of the customer I can upload boarding passes to the customer's profile I can send the customer details throughout the process through Whatsapp/SMS(?) and Email I can view previous trips the customer has been on I can request and view feedback from the customer I can view reporting dashboards and detailed reports I can cancel the holiday for the customer and provide a cancellation invoice for the

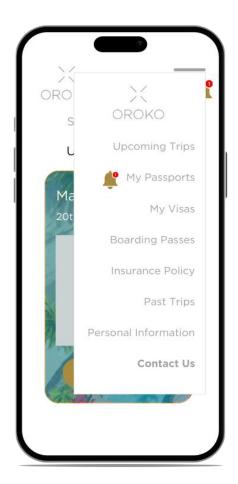
#### Through our system we can automatically... Create a customer profile from the details in our CRM Display itinerary summaries and details to the customer Communicate with suppliers & receive pricing/availability within booking/enquiry Provide receipts for payment Provide outstanding balance Display the stage of the process Display outstanding actions and prompt customer Enable uploading and downloading of documents Validate passport information Alert when there is information or an action outstanding Send email/whatsapp reminders to the customer Send email/whatsapp follow-ups to the customer



## **X** Web Application – Customer Profile







#### As a customer through my customer profile ... I can view a summary of my trip and view more information on any individual aspect at the touch of a button I can see what actions I need to take I can see where I am in the process I can pay my deposit I can view my balance I can pay my balance I can upload my passports I can provide visa details, apply for visas or view updates on visa applications I can view and download all documentation needed for my trip I can view and download my travel insurance policy details I can view, download and forward my boarding passes I can view my previous trips I can see a countdown to my holiday I can access all contact details I need I can access my cancellation invoice if I need to cancel the trip



