

MANAGING THE ENTIRE CUSTOMER EXPERIENCE IN ONE SYSTEM



GlobeNet Travel furthers Salesforce journey to manage the entire customer experience

GlobeNet Travel, one of Australia's largest independent travel agencies, set off on its own journey three years ago to improve service and productivity with Salesforce. Initially, the Brisbane-based company implemented a custom CRM built on the Salesforce1 platform. The CRM provided GlobeNet Travel with a single view of its customers up until the booking stage. The productivity gains were massive but GlobeNet Travel knew it could get even better results by moving more of its operations onto the platform. That's when it engaged Tquila ANZ.

"[Tquila ANZ] really got to know our business and spent a lot of time with our finance manager to understand exactly what we needed the solution to do."

-Dan Russell, General Manager for Globenet Travel

Dan Russell, General Manager and Director for GlobeNet Travel, said, "We previously used two different systems to manage customer relationships and bookings. It was inefficient with team members going back and forth between the two systems and doubling up on data entry."

Even worse, the use of the two separate systems was impacting customer service.

Dan explained, "It's critical we provide our customers with accurate information related to their travel plans and with the two different systems there was a lot of room for error. For example, we were often sending bon voyage emails to customers who no longer planned to travel as their bookings had been cancelled in one system but not the other."

With the license for its mid-office accounting system about to expire, GlobeNet Travel saw an opportunity to consolidate systems and build out its Salesforce solution to provide a more tailored customer experience.

A collaborative approach

Dan and his team were quick to engage Tquila ANZ as Director Ian Carpenter had played a key role in the development of GlobeNet's initial Salesforce solution.

Russel explained, "We were introduced to Ian by Salesforce and had a really good experience working with him the first time around. We knew that he had built a strong team locally so we picked up the phone to him again and haven't looked back."

The relationship was a collaborative one with GlobeNet Travel's IT and finance managers working closely with Tquila ANZ to scope and design the solution. GlobeNet Travel took on a lot of the data cleansing and implemented Drawloop for document creation and delivery. Tquila ANZ did the heavy lifting, building out the Salesforce solution to manage the entire customer experience.

Russell said, "We were fortunate to have the same senior architect from Tquila ANZ working on the project from start to finish. He really

got to know our business and spent a lot of time with our finance manager to understand exactly what we needed the solution to do.”

The close collaboration between the two companies and Tquila ANZ’s Salesforce expertise enabled the successful development of a custom double general ledger built on the Salesforce1 platform. Dan said this was one of the most challenging aspects of the project and the solution was potentially the first of its kind in Australia.

Another successful delivery

The success of the initial Salesforce implementation gave GlobeNet Travel confidence that Tquila ANZ could deliver this second phase and they were not disappointed.

Dan said, “We had an artificial line in the sand with the license for our mid-office system expiring and the project team worked hard from September to May to make sure we were ready to cut over to the new

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solution in time. Tquila ANZ did a great job with the project management, making sure the work was manageable and holding everyone to account.” The migration to the new solution was a success with the project team working night and day over the weekend to migrate 6,000 live bookings. Dan commended the team’s commitment, particularly the lead architect who was still on deck Monday morning to ensure business ran smoothly that day.

“The migration was high pressure as we were moving financials and details of customers’ holiday plans representing \$20 million of business. It was critical the data remained intact and it did.”

A more tailored customer experience

GlobeNet Travel can now manage the entire customer experience within Salesforce. Dan said, “The solution allows us to provide a more tailored service to our customers from the first point of contact through to welcoming them home from their trip. We can issue invoices and itineraries, track payments and generate custom emails and SMS alerts, including bon voyage messages and welcome home surveys.”

Most of these processes are now automated, boosting productivity by 25%. Sales were also up just one month after implementation.

Dan said, “After bedding down the new platform in May, we had a standout June with 55% year on year growth. It was great validation that the solution is working well for us.

“There’s still more we want to do with Salesforce and we’re looking at expanding our reporting capabilities but we’re in a great position now with being able to more easily provide a top holiday planning experience for our customers.”

Results

- The implementation was a success with 6,000 live bookings migrated across to the new solution as planned
- Productivity is up by 25% with staff able to manage bookings entirely within the one system
- The customer experience has also been improved with staff able to ensure timely and accurate communication