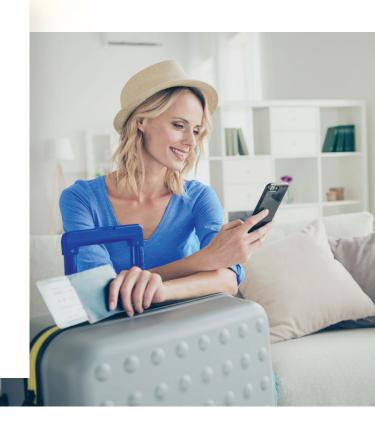**LTIMindtree**

Guest & agent experience transformation for vacation rental giant using Salesforce integrated CRM

LTIMindtree

Client overview

The client is a **US-based leading global vacation company** that offers vacation ownership and related businesses, products, and services to customers globally. It is also amongst the **world's top three vacation experiences companies** with more than 100 resorts around the globe - comprising a diverse portfolio that includes some of the most iconic vacation ownership brands. Post the pandemic, this industry has seen tremendous business recovery to the extent that the client and many of its peers have increased their annual guidance for FY 2022.

Background

Client aspires to be the top brand of choice for vacation owners globally and wanted to enhance their digital experiences - towards that goal, it decided to embrace enterprise-level multi-year digital transformation and redefine itself.

- Their target customer segment was shifting towards a new demographic – millennials – who perform product searches and book largely on online ecommerce applications. Given this, client planned to reconsider its go-to-market and offer experiential vacationing, smart technology, and personalization.

- Also, new digital-native competitors were entering the market and existing ones were investing aggressively in their digital transformation.

- The client's marketing, sales, and service teams were using multiple disparate systems and applications when attracting and retaining customers, resulting in increased complexity, redundancy, and manual data capture.

The intent was to automate and unify business processes across brands and reduce complexity by simplifying the architecture to a single comprehensive 360-degree view of leads, customers/owners, and guests on one integrated CRM platform, in real-time, across all markets globally. Eventually, the transformed enterprise would empower its marketing, sales, commerce, service, and IT teams to work as one and deliver personalized experiences that customers love, and build lasting, trusted relationships.

This pace of transformation became even more critical as the economy reopened in the fall of 2020. The pandemic accelerated the natural pace of change and the client had to transform even faster to address the new market expectations.

- Radically transform the way employees and owners interact with each other, leveraging digital and online channels and touchpoints

- Connecting various owned brands in a unified digital experience to provide prospects, leads and customers with enhanced omnichannel capabilities

- Unified architecture across customer touch points to enable the replacement or retirement of multiple legacy apps

- Multi-year business cases to capture the value and fund the integrated roadmap - replacing multiple siloed business cases

Challenges

System Challenge

Use of disparate legacy systems by sales & marketing teams to manage marketing and booking processes across various brands

Process Challenge

Inefficiencies in the lead / campaign management process, leading to increased time and decreased productivity

People Challenge

Need for manual interventions and data inputs across the lifecycle, leading to usage complexity and supervisor inputs

Operational Challenge

Lack of a unified integrated guest view with interaction history and marketing activities, leading to redundancy

The client chose Mindtree as its implementation partner to embark on their transformation journey to address and overcome the business and system challenges that they were facing.

Solution

Unified marketing and sales operations across brands by establishing a best-in-class harmonized process for marketing and lead management

Integrated Salesforce with the existing Computer Telephony Integration (CTI) system to provide a seamless inbound and outbound call management process with automated routings, skill-based assignments, and intuitive pop ups

Integrated various source systems of lead capture (Web, Merkel, Siebel marketing) and leveraged Intelligent Data Management Cloud IDMC to establish a single view of leads and campaigns while eliminating redundancy and duplicates

Created a centralized data quality rules repository - for enhanced data quality and adherence to data standards and compliance

Enabled new state-of-the-art UX/UI leading to an elevated experience for the users

Basic Features

- Single Sign On-enabled Salesforce environment to allow seamless login and access
- Integrated Call Center Operations on Salesforce with highly intuitive sales console setups
- Integrated Nice in contact telephony system
- Lead management capabilities [Creation and conversion]

Outbound Call Management

- Enabled the availability of CXOne soft phone layout within Salesforce for seamless outbound call management
- Automated routing of leads to call center agents based on skill / availability
- Provided the ability for call center agents to make outbound and disposition calls and take appropriate notes to maintain a rich history of interactions

Inbound Call Management

- Provided the ability to receive and respond to customer calls from within Salesforce via the CXOne soft phone
- Automated pop up of lead and account information for call center agents along with campaign information to ensure they have all information at their fingertips
- Display of intuitive welcome and call scripts for agents based on the type of campaign and stage of interaction to provide them with a guided selling framework

Customer 360-degree

- Centralized one stop window for all leads from various sources such as Web, Merkel, Siebel Marketing and ROKT
- Provided availability of interaction (activity) timeline and history against leads and accounts in one place as a single source of truth
- Enabled traceability of past and ongoing transactions in real-time in one place

Technologies Involved

salesforce sales cloud | heroku PostgreSQL | salesforce service cloud | Informatica IDMC | MuleSoft | NICE CXone

Results

User Empowerment

Enhanced the agent experience, improving the productivity of the call center operations while facilitating insights-driven guest experiences. Provided an elevated agent experience between sales, contracting and owner onboarding journeys.

Single Source of Truth

Improved data visibility across teams owing to the enablement of a single consolidated guest view with all transactional / interaction history. Configured associate screens/ views with Customer 360 data, based on their roles and responsibilities, helping increase Sales Close Rates.

Guest Satisfaction

Improved the guest experience, resulting in increased satisfaction, brand recall and potential referrals. Personalized, and improved on time availability of relevant products and services on agents' screens, thus ensuring better discovery, up-sell and cross-sell, and highly engaged customer experiences.

System Modernization

Application consolidation and modernization of 25+ year old system(s), resulting in improved scalability, operational efficiency, and agility.

Transparency

Improved insights for senior management, resulting in better visibility into cross brand data. An integrated CRM platform ensured that the associates had a complete view of the customer journey.