

Journeys International Uses SugarCRM to Take its Customers on Amazing Adventures

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Company Profile

Journeys International creates and delivers extraordinary guided adventures that fulfill dreams, stretch understandings, protect the natural environment, support traditional cultures, and foster connections between people. Journeys' clients are socially conscious, educated travelers who seek to make authentic connections in exotic locations.

Company Stats:

- Industry: Travel
- Plans and operates group and custom trips in 60 countries
- Loyal customer base, heavy referral business

Business Situation

Family owned and operated since its conception 36 years ago, Journeys International prides itself on creating real connections for its clients - beginning with the relationship between the Journeys team and their customers, and continuing throughout the journey abroad and beyond. Prior to its implementation of SugarCRM, Journeys International had a "good database," said Robin Weber Pollak, the President of Journeys International, "but we didn't have a 'formal' customer relationship management (CRM) system."

Scaling recently became a concern for Robin, who stated that while their old system logged the past, it didn't lend itself to data retrieval which made obtaining aggregates - and by extension insight - next to impossible.

In order to scale the business while preserving the personal touch with which its customers have grown accustomed - and on which the brand depends - Journeys International sought a highly flexible solution that had incredible automation and reporting capabilities.

“We thought our customer service stats needed the most improvement, but now that we can actually measure them, we realized they were fine.

...we saved ourselves from investing money in something that wasn't actually broken!”

- Robin Weber

Journeys believed tool possessing all three of these traits would provide a sound data repository, the insight to identify trends, and the ability to act on them in a personal, yet programmatic way.

PROJECT OPENING DESIRE: By deploying a new CRM, Journeys International anticipated the need to invest in a few specific areas of its business -- customer support for one. Without any formal way to measure this, however, they budgeted solely on conjecture. Robin looked forward to measuring her business before investing time and resources to areas which, in the case of support, ultimately required little work.

Technical Situation

Robin and her team did their homework and quickly realized that Journeys International's data didn't fit the mold of “traditional CRMs”. They don't have contacts, opportunities, and accounts, but they do need to manage relationships with their clients. Robin actually selected SugarCRM before partnering with TAI. She believed she could take the flexibility of SugarCRM and build herself the *XRM solution Journeys International needed.

“Journeys International was the first customer [of mine] who didn't use a single core CRM module...a true ¹XRM use case. Very exciting!”

- Lan Luo, Technology Advisors

While her software selection was sound, the initial attempt was unsuccessful, and Sugar sat on the shelf for almost a year. After discussing her frustrations with the SugarCRM team, Robin was introduced to TAI, whose expertise they believed would guide Journeys International in the right direction.

PROJECT EYE OPENER: SugarCRM uses partners to implement their customers' XRM use cases. Had Journeys International realized sooner the help they really needed was out there, in the form of SugarCRM's partner network, much time and effort could have been saved.

¹XRM is industry jargon for non traditional deployments of CRM software. The X is a throw-back to high school algebra, representing a relationship management system (RM) that manages relationships between the entity (you) and whomever you need (X).

Solution

Technology Advisors began by performing a full business analysis. It was during this process that Lan Luo, Journeys International's consultant at TAI, realized TAI should scrap all the traditional CRM modules and build them a truly unique solution from scratch.

As a tour operator, Journeys International tracks their clients' travel reservations. They have "households" and "travelers" who are interested in specific trips to a destination. They ultimately purchase a place on a particular departure which will be fulfilled by an operator on the ground. Travel agents resell their adventures to families who travel together, requiring custom modules to track reservations and operators, which change from country to country.

With module requirements identified, TAI was ready to begin the implementation process. First, the data was migrated from Journeys' old database. Next came the automation - everything from workflows, to custom PDFs, to automated follow-up reminders. Finally, attention was turned to reporting and dashboards. Data is nothing unless you do something with it, and the Journeys International team had a keen interest in answering some tough questions. For instance: "based on travel history, what other vacations are people likely to take?"; "is there a particular type or region showing enough promise to justify expansion?"; and "where can we improve occupancy of existing trips?" - to name a few. Based on the data model TAI designed, answers to these questions flowed naturally.

PROJECT GEEK SPEAK: According to Lan, the reservations module required the most automation. "Prospects become clients, clients book holidays. Or is it a family that books? Or a group of families? The myriad of possibilities meant the workflows we built had to be very intelligent and flexible."

When it came time to invoice and issue travel vouchers to clients, Journeys International needed to lean on the system to streamline the process. TAI supported this need by developing custom PDF templates that created a brand-worthy standardized deliverable for Journeys International's clients.

Benefits

Today, Robin and her team run reports frequently; she enjoys the flexibility of their custom spin on SugarCRM. "Just in terms of day-to-day, this helps us get on top of client accounts." In the past year, Journeys International has identified trends among its customers' destinations of interest, discovered the optimal lead time to tailor marketing efforts, and adapted efforts accordingly.

“Primarily we manage the relationships with the [travelers], but now we can use the CRM to facilitate communication with our partners on the ground too. This helps the guides prepare and know our clients better.”

- Robin Weber Pollak

Since implementing SugarCRM, the Journeys International team takes more targeted approaches with their pursuit of clients. The quality of relationships remains central to the unique value proposition. Normally, it may become increasingly difficult to maintain high quality as the business grows, but SugarCRM has proven to be crucial to the successful maintenance of service.

The system also has allowed Robin to better track what she calls her “inventory” - that is, the specific excursions travelers take. Now, she easily identifies trips with only a few signups, and works to recruit additional clients.

Full trips protect margins and since SugarCRM, Journeys International’s average trip occupancy has improved greatly.

Finally, the additional benefit of improved financial management (SugarCRM allowing Robin and her team to better track collections and their accounts receivable) has left Robin looking forward to what else Sugar can do for them. In the future, she plans to work with TAI to integrate SugarCRM with her other applications, including their website, accounting, and merchant gateways. Once integrated, Robin is confident the benefits already realized will only be compounded.

“We will work with Technology Advisors again, they are very responsive and really took the time to understand our needs,” says Robin.

By partnering with TAI, Robin - and the entire Journeys International team - transformed a complex set of CRM requirements into an XRM solution that continues to deliver benefits to all aspects of their business. With SugarCRM and TAI on their side, Journeys International has already embarked on its own adventure: truly scalable growth.