Travelopia

CASE STUDY

Leveraging technology to make customers happier

How a bespoke booking system transformed the way customers engage with Travelopia

EQUAL EXPERTS

Travelopia is a long-standing customer with Equal Experts. In March 2022 we started a new piece of work to transform how customers engage with their Yachts business via the customer bookings system. Once a customer has made a booking, their information is stored in line with GDPR requirements, and fed into the CRM system used by pre-departure teams to ensure a smooth start to their holiday. Equal Experts were tasked with improving an existing guest information form to secure personally identifiable information (PII) whilst creating flexibility for customers, pre-departure teams, and the sales teams in the Sunsail and Moorings brands.

The team built a user-friendly guest information form which enabled efficiencies in handling customer queries and gave customer service teams the confidence and time to focus on pre-sales activity, knowing their existing guests' data was both dynamic and secure.

3
months to
live MVP

4%
increase in sales team
bandwidth since go live

845
calls saved
in 4 months

EQUAL EXPERTS

About Travelopia

Travelopia is the world's largest collection of experiential travel brands. Each brand represents a different style of travel, from adventure holidays and experiences on the water, to tailor-made trips and private jet expeditions. The business brings together over 2000 colleagues from around the world, who work together to create industry-leading travel experiences.
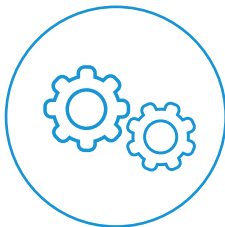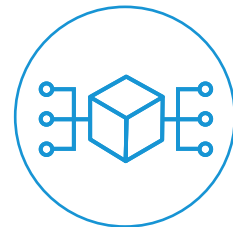
INDUSTRY	ORGANISATION SIZE	LOCATIONS	SERVICES
Travel	1,500 employees	UK and worldwide	Design, Data, Deliver, Transform

Never judge a book... why the discovery phase is your best friend

The initial ask seemed straightforward – a rebuild of a customer information form that was causing frustrations to customers and the business. However, as we dug deeper into what the customer really needed, we uncovered complexities that we knew would need a multifaceted approach.

Essentially, the task was to improve and enhance a form that Yachts customers were asked to complete as part of their detailed booking information, so that pre-departure teams in multiple countries had all the information required to comply with local regulations.

The existing form had been built some years previously. Since then, the business need had evolved, and the existing system was causing frustrations for customers who needed a way to access and edit their completed forms post-booking. As a result, customers tended to delay submitting their information until the last minute, meaning sales teams often received incomplete information and had to manually follow up to collect the necessary details; this was costly in terms of people hours and time spent troubleshooting instead of driving sales.

By speaking to internal users, we uncovered the key pain points to identify what Travelopia teams and their customers really needed. It became clear that simply redesigning the form wasn't the best (or fastest) solution. The question posed in discovery was:

"How might we enable customers to provide (and edit) their information in a more convenient way, reducing the need for the sales team to chase information and deal with queries?"

As a result of the discovery process, we reframed our approach from upgrade to new build, opting to build a new, user-friendly product which allowed us to incorporate more flexibility for the end user.

Transforming data fast with security in mind

One of the main considerations was the need to comply with GDPR requirements to store and use sensitive customer data (e.g. passport ID, birth dates, etc.) securely. This had led to multiple hurdles on previous attempts to upgrade the form, including constraints within Travelopia's Hubspot integration, which would house a central bank of customer information; this had undermined confidence within the business.

Our options at this point were limited: either we could build an alternative to the Hubspot tool (causing delays in production), or abandon the form and consider a completely different solution. Equal Experts is known for creating innovative, agile solutions which meet our customers' needs, and the Travelopia Yachts engagement is a perfect example of how we did just that.

Without impacting the desired go-live time, we rapidly identified an alternative solution within the client's existing Microsoft suite. By creating a Sharepoint site with daily updates of customer data, we enabled operations teams to use Hubspot in the way they had originally intended, to access the PII information they need to ensure holidays go smoothly. **This reduced the number of calls to the customer team by 845, saving the business 42 hours of call time within 3 months of going live.**

This was a quick win which really got Travelopia teams excited; we were able to complete this feature very simply within 2 days, with minimal requirements from the infosec team, to ensure we were able to deliver the product on time.

Establishing trust between business and technology

In proposing a new solution, our team was mindful of the need to take people with us. The previous roadblocks had caused some nervousness in the business, and it was essential that we restored confidence in the envisioned outcome. For this, we needed to work with complete transparency.

First, we made sure we fully understood the business needs. Then, as we iterated on the form's design and rationalised our goals to meet the desired timescale, we gathered feedback by showcasing wireframes to stakeholders and users. Reaching out to users in this way allowed us to incorporate feedback and identify stakeholders who became invested in helping to finesse the final outcome. The end result was a product which exceeded expectations and gave confidence back to the organisation.

By being open about the decisions taken, involving people early, and using evidence from data, we created a conversation which helped to build trust.

The advantages of Equal Experts' nimble approach

Being nimble and creative helped us to adapt quickly to changing scenarios. For example, catering to different markets meant supporting different languages; while this did not seem to be a problem initially, the team hit bottlenecks as the content management teams didn't have capacity to support translations. We quickly helped to enable translations using third party tools vetted by the Travelopia team.

We successfully designed and built the new form to go live within 3 months. The end product was not what Travelopia had originally envisioned, but something better; it did the job the customer needed in a way they hadn't previously considered. We achieved this result by partnering closely with stakeholders to continually increase scope in some areas whilst narrowing it where appropriate. This way of working with the customer enabled us to very quickly understand the needs of the business and deliver an MVP in a very short space of time.

We also found ways to improve results fast when we hit downtime. The team had decided to delay go-live to avoid clashing with a peak sales period, but rather than leave the tool idle, we used the time to make one small change which had a massive impact for the business – the problem of customers being unable to edit their information once they'd submitted the form.

Enabling edits to the entire form had been descoped due to the existing time frame, plus reproducing all of a customer's information every time they wanted to make an edit just wasn't possible to achieve securely and efficiently. However, our analysis told us that it was usually flight information that customers needed to change, so we focused our efforts on just that part of the form. Customers can now very easily self-serve on changing flight details if they need to, which has resulted in a hugely reduced number of customer service phone calls.

Within 3 months of go-live Travelopia had reduced the number of calls to the customer service teams by 845. With calls lasting an average of 3 minutes, that's a lot of time given back to focus on top line sales. In addition, the number of guests fully completing their forms prior to departure rose by 4%, again reducing the workload on customer service teams.

> **With Equal Experts, we first became nimble in the Catalyst project; we were wrong to think this was a fluke as we had repeated success across multiple Travelopia brands. Equal Experts's ownership and commitment to our success was key.**
> **Sreekandh Balakrishnan, Technology Director**

Want to know more?

Are you interested in this project?

Or do you have one just like it?

Get in touch. We'd love to tell you more about it.