

# Case Study



## Enhancing Customer Engagement Through Centralized Travel CRM

Transforming Travel Campaigns and Operations with CRM Solution by Trident

**Industry:** Travel & Destination Management  
**Location:** India  
**Solution Implemented:** Centralized CRM Solution by Trident



### ABOUT CUSTOMER

Sita Travel India is the country’s leading Destination Management Company, with over 53 years of excellence in delivering travel services across India. Backed by a network of 450+ professionals across 19 offices, Sita is known for its personalized travel experiences and strong market presence.

### CHALLENGES

Despite its leadership in the travel industry, Sita Travel faced operational challenges that impacted efficiency and customer engagement:

- **Fragmented Prospect Management** – Difficulty in centrally locating, attracting, and engaging both new and existing prospects.
- **Manual Customization** – Inefficient handling of short trips and full-fledged packages on a per-customer basis.
- **Scattered Customer Tracking** – Lack of structured systems to track bookings, feedback, appointments, and communication.
- **Ineffective Campaign Targeting** – Absence of a contact management system for personalized marketing efforts.
- **Limited Sales Visibility** – Inability to track leads, follow-ups, and conversions effectively.
- **Siloed Systems** – Existing systems were not aligned to support a growing customer base or cross-location operations.

### SOLUTION IMPLEMENTED

Trident implemented a tailored CRM solution to centralize operations, automate reporting, and improve visibility across customer touchpoints and marketing activities.

- **Sales Trips Mapping** via centralized task and appointment tracking
- **Automated Alerts & Visibility** for escalations and updates to management
- **Scheduled Management Reports** auto-generated by service, country, and segment
- **360° Engagement Dashboard** showing live data on campaigns, leads, contacts, and opportunities
- **Mass & Auto Mail Campaigning** by customer segment, service type, and location
- **Advanced Campaign Planning** – Integrated tools for budgeting, planning, execution, and outcome tracking
- **Role-Based Access** – Control by business unit for secure data handling

### BENEFITS TO CUSTOMER

- Clear Visibility of **Campaign Cost vs ROI**
- Accurate Management of **Customer & Partner Data**
- **Auto-Scheduled Emailers** by customer segment
- **Automated Management Reports** and escalation alerts
- Improved **Revenue Tracking** by business entity and customer type
- Structured **Appointment Scheduling** with real-time alerts
- Enhanced **Lead and Opportunity Tracking** for better conversion rates
- Centralized **Customer Interaction History** for personalized service
- **Reduced Manual Workloads** through automation

### CUSTOMER TESTIMONIAL

"Trident’s CRM solution brought clarity, structure, and control to our customer engagement. From lead tracking to campaign ROI—everything is transparent, efficient, and accessible. It’s the digital backbone we needed."

— VP – Operations, Sita Travel India

### TRIDENT INFORMATION SYSTEMS



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