



TrailBlaze CRM

**EMPOWERING YOUR TRAVEL
BUSINESS WITH ADVANCED
CRM SOLUTIONS**

FORMAT14CRM

Revolutionise Your Business

Unlock the full potential of your travel business with a cutting-edge CRM solution that's built on the market leading No-Code platform. Designed specifically for the bespoke travel sector, **TrailBlaze** provides the flexibility and scalability needed to streamline operations, enhance customer engagement, and optimise profitability. The powerful no-code framework allows for seamless customisation, enabling you to adapt the system to your unique business needs so you can continuously improve and enhance your customer experience.

With powerful Business Process Management (BPM) and Dynamic Case Management capabilities, you're able to automate and optimise every aspect of your operations, whether it's customer inquiries or post-trip feedback. Integrate all travel-related costs, such as accommodation, transportation, and more, into a single, comprehensive platform that evolves with your business.

Our platform is not just about handling data - it's about you delivering exceptional customer experiences at every stage of the journey. From initial enquiry to trip follow-up, **TrailBlaze** ensures that your team is equipped with the tools to provide personalised, efficient service, allowing you to focus on exceeding customer expectations and growing your business.

This solution is designed to help your business stay agile, productive, and profitable in a competitive industry. To explain how and where **TrailBlaze** adds value, we've grouped our cutting-edge functionalities into three key business areas:

- Cost Management
- Customer Relationship Management
- Operational Efficiency

Each area describes how **TrailBlaze** is designed to enhance travel business operations.



Cost Management Features

Accurate Costing Across All Components of Travel

Automatically integrate all travel-related costs, such as accommodation, transportation, and attraction fees, into a single interactive quote.



Channel Crossing and Coach Costs

Integrate specific costs for both coach travel and channel crossings, allowing you to quote accurately for international trips.



Accommodation Costing and Bed Capacity Management

Manage bed allocations and accommodation costs in real-time, ensuring you never overbook or underquote on accommodation.



Seasonal Cost Uplifts

Automatically adjust costs for new seasons or fiscal periods, ensuring pricing is always up-to-date.

Margin Control and Profitability Management

Track and manage gross profits and margins for every trip. Ensure profitability with automatic flagging for quotes that fall below margin thresholds.



Customer Relationship Management (CRM)

Comprehensive Customer Profiles

Build detailed profiles for customers and groups, storing all relevant data to provide personalised service for repeat and new bookings.



Integrated Customer Feedback

After every trip, send automated feedback forms to clients, linking results back to customer profiles for continuous improvement and bonus programs.

Customer Enquiry Tracking

Track enquiries from your website and convert them into opportunities for your sales team, ensuring no potential lead is lost.



Dynamic Case Management

Manage customer inquiries and issues using case management tools that allow teams to resolve customer requests efficiently.

Quote Generation and Automation

Seamlessly create quotes using pre-integrated templates that automatically pull costs, accommodations, and customer preferences into a professional proposal ready to send to clients.



Operational Efficiency Features

Process Automation

Automate routine administrative tasks, such as invoice generation, payment processing, and feedback collection, allowing your team to focus on serving your customers.

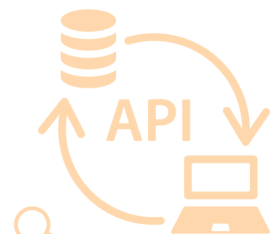


Integrated Payment Systems

Link payment systems directly to your CRM. Automatically record payments and link them to specific trips, reducing manual work for finance teams.

Data Migration and Synchronisation

Ensure seamless data transfer from legacy systems to the CRM with ongoing synchronisation, keeping your data accurate and up-to-date during the transition phase.

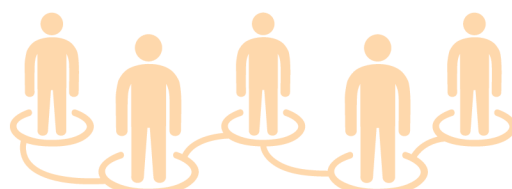


API Integrations

Connect with external applications such as Qwilr for quoting or other third-party systems for full operational visibility and control.

Flexible System Customisation

Customise workflows, templates, and reports to suit your business needs, allowing the system to grow and evolve with your business.



Benefits of Implementing TrailBlaze



Streamlined Operations: Reduce the time spent on manual processes with automated data flows, cost management, and quoting systems.



Increased Accuracy: Eliminate human errors with real-time data integrations and cost adjustments, ensuring your quotes are always accurate.



Customer Satisfaction: Provide personalised, efficient service using comprehensive customer profiles and dynamic case management tools.



Scalability: The system is designed to grow with your business, accommodating increasing trip volumes and complexity.



Profitability Control: Stay on top of your business finances by tracking margins and flagging underperforming trips early.



Improved Decision-Making: With built-in reporting and analytics, you can easily track performance, margins, and customer satisfaction.



Implementing TrailBlazeCRM

We understand that each business is unique, and our professional services team will work with you every step of the way to ensure a smooth transition to the new system.

Project Roadmap for CRM Implementation

Phase 1: Discovery & Planning

Timeline: 4–6 weeks

We begin with in-depth discovery sessions to understand your business processes, current system limitations, and future needs. A tailored project plan is created to ensure all critical processes are supported from day one.

Phase 2: System Design & Customization

Timeline: 8–12 weeks

Based on the discovery phase, our team configures and customises the CRM to your specific business requirements. This includes setting up key modules, integrating third-party systems, and ensuring all workflows are optimised.

Phase 3: Data Migration & Integration

Timeline: 6–8 weeks

We use robust ETL tools to migrate data from your legacy systems, ensuring accuracy and consistency. We also integrate any external applications (e.g., quoting engines, payment systems) via APIs.

Phase 4: Testing & User Training

Timeline: 4–6 weeks

Once the system is in place, we conduct thorough testing with key stakeholders. This includes both functional and user acceptance testing. We also provide user training sessions to ensure your team is fully comfortable using the new system.

Phase 5: Go-Live & Post-Implementation Support

Timeline: 2–4 weeks

After a successful go-live, our team provides ongoing support to ensure smooth operations. We address any issues quickly and provide continuous updates and improvements.



TrailBlaze your own journey with Format14CRM

Transform your travel business with TrailBlaze from Format14CRM, the ultimate solution for streamlining operations, enhancing customer relationships, and driving profitability. With powerful no-code capabilities, seamless integrations, and a focus on scalability, TrailBlaze empowers you to exceed customer expectations while optimizing your processes.

For more information on how Format14CRM can support your digital transformation, contact us today on **01628 281 114**.

@ Email

sales@format14crm.com

📍 Address

Format14CRM, Newlands Mount, Bath Road,
Maidenhead, Berkshire, SL6 4LQ, United Kingdom

☎ Telephone

+44 (0)1628 281 114

🌐 Website

www.format14crm.com

