

## CUSTOMER CASE STUDY

# How Mexico's Biggest Tourism Company Configured a Powerful Customer Experience Solution

The agency was made up of little more than three vans, two visionaries and one very big dream for the future. And while that may sound like the start of any great success story, this one is different. Because it wasn't investors and industry disruptions that propelled Lomas Travel from its humble beginnings to become a wildly successful business. For the company's founders, there was far more at stake. If they were going to succeed, there was one thing they'd have to do really, really well: impress the heck out of customers.

Today, Lomas Travel stands as Mexico's shining example of what can be achieved when a business is built entirely upon extraordinary customer experiences. Widely known as a pioneer in the country's tourism industry, Lomas Travel has grown to become one of the country's strongest enterprises and biggest travel companies.



**Industry** ///

Tourism

**Location** ///

Cancun, Mexico

**Website** ///

[www.lomatravel.com](http://www.lomatravel.com)

More than 1,000 tourism specialists take care of more than one million travelers each year. They coordinate destination weddings, arrange activities, handle transportation and plan trips. While the bulk of business comes from transfers and excursions, the Lomas Travel footprint doesn't end there. All-inclusive resorts, popular amusement parks, an activity-packed marina and an up-and-coming waterpark are all part of its portfolio. All fueled by outstanding customer relationships.

The company faced just one big problem. Each time the business hit another milestone, its customer base would expand. Again. And for all its innovations and advancements, Lomas Travel was in desperate need of a way to connect, communicate and manage the customer experience.

## **“We Created a Monster.”**

For decades, Lomas Travel relied on homegrown solutions to manage the customer experience and navigate its growing network of agents. “We used to have everything in different Excel sheets,” said Corporate Director Manuel Lamadrid. “They were good Excel sheets, but there's only so much you can do with spreadsheets. It was a lot of work, to say the least.”

What technology the company did have was spread across departments with no way to integrate or unify systems. Each department had its own way of doing things. None of the systems “talked” to one another, and it was impossible for employees to get a 360-degree view of customers and their needs.

“We created a Frankenstein by hiring one company, then another and a third and fourth until we had a monster on our hands” Lamadrid said. “It became very confusing.”

The company had accomplished so much, but had yet more goals to achieve. The one roadblock: technology. Agents didn't have a strong understanding of commercial activities, couldn't launch campaigns automatically and lacked the visibility needed to be effective. Clearly, it was time to make a change.

## **Time for a Change**

When Lomas Travel set out in search of a better solution, decision makers had a very clear picture of what they were looking for.

- They needed a solution that would offer a lot of flexibility.
- They needed to deploy “really fast” — faster than the average platform.
- They needed to integrate with a wide range of systems, including the company's mission-critical ERP.


Most importantly, they needed to gain a lot of intel: on customers, on opportunities, on sales and on how the three come together as agents work toward goals.

The company considered numerous options such as Salesforce and Microsoft Dynamics, but in the end only Sugar's customer experience platform met all the criteria.

Within a matter of months, a core group of sales and promotions professionals were daily relying on Sugar to measure outreach using a specialized Meeting Module.

**“As a tourism company, we need to keep up our sales and avoid wasting the opportunities that are in front of us. Thanks to Sugar, we now have a wealth of reports, information and feedback we can use to continually improve.**

**—MANUEL L.,** Corporate Director, Lomas Travel



That number quickly grew to incorporate more than 100 sales and marketing team members across a wide range of service areas.

## Configurations to the Rescue

In a simple and easy way, Lomas Travel has managed to configure Sugar so the business and its professionals can stay ahead of trends and changes.

Sugar integrates seamlessly with the company's ERP, which means specialists can finally get a clear picture of agent activities. Lamadrid and his team can see which opportunities are turning into sales, and replicate those successes across the organization.

Most importantly, Lomas Travel has been able to adapt the system to meet its needs — an especially important aspect when it comes to high-value groups and B2B clients. In an industry where one-on-one communication with customers is critical to success, the company needed a way to measure the effectiveness of meetings. All it took was a few add-on modules and configurations to gain full visibility into the impact of meetings held by agents all over the world. Executives can see what's working and which opportunities are converting into sales.

"Sugar has helped us overcome our biggest challenges," Lamadrid said. "As a tourism company, we need to keep up our sales and avoid wasting the opportunities that are in front of us. Thanks to Sugar, we now have a wealth of reports, information and feedback we can use to continually improve."

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## About SugarCRM

SugarCRM is how marketing, sales, and service teams finally get a clear picture of each customer to help businesses reach new levels of performance and predictability. Sugar is the CRM platform that makes the hard things easier.

Thousands of companies in over 120 countries rely on Sugar to achieve high-definition CX by letting the platform do the work. Headquartered in Silicon Valley, Sugar is backed by Accel-KKR.

To learn more visit [www.sugarcrm.com](http://www.sugarcrm.com) or follow @SugarCRM.