TRAVELLER PROFILE MANAGEMENT

A GUIDE ON THE SELECTION AND IMPLEMENTATION OF THE RIGHT PROFILE MANAGEMENT TOOL

GDPR
COMPLIANCE

PCI DSS
CERTIFIED

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PURPOSE OF DOCUMENT

Finding a way to store and manage travel profiles "under one roof ", ensuring connectivity to various booking tools and CRM systems, and having the synchronization process automated are the core features that define travel profile solutions. Profile Management Systems provide the solutions.

This user guide is intended to help travel agencies (TAs) and Travel Management Companies (TMCs)

— **understand travel profile solutions and their advantages**

— **support the profile management tool selection**

— **get an idea of the implementation process**

— **understand the minimum required investments**

— **clarify how all these can be achieved in the quickest way possible**

BUSINESS BENEFITS OF PROFILE SOLUTIONS

With the rise of ever more booking solutions and platforms, traveller profile data management continues to take ever more significance in the travel industry. A key system component of any agency, it ensures smooth operations of the day-to-day business through both **data consistency** and **data security**.

Data consistency

Data consistency across all connected platforms is achieved by a central hosting system that connects to multiple different 3rd party systems, and in doing so allows simultaneous updates of profiles across these interfaces.

Automated profile data management goes the additional extra step to ensure a handsfree, simultaneous synchronization of profile updates received via external feeds are automatically sent on to further interfaces. Manual updates for profiles already hosted in such a tool can also be performed at the click of a single button – ensuring the transmission of latest-version profile data to all connected systems.

The perfect travel profile solutions tool also tackles the problems that come with storing forms of payments and is connected to at least one or more CRM tools to simplify backend processes such as billing and reporting. With many interfaces, it will offer a broad selection of connected platforms and data entry points. HR feeds sending profile data directly to the tool from Corporates will allow profiles to be created, maintained or deleted without agency interaction.

Data security

Data security is a crucial factor that drives the profile tool choice. The ideal system should attest to GDPR as well as PCI/DSS regulations to ensuring the agency is compliant. In line with this, the server locations also play a critical role as territorial data access regulations drive more and more demand for data to be hosted in specific geographical regions. Should a system fulfil all requirements set by a TA/TMC, yet have its servers located in a country with either lower security standards or with legislation permitting access to that data, this could be a deciding factor on whether to proceed with the tool. Additionally, with the Right To Be Forgotten becoming law in many countries though GDPR, profile deletion across all connected systems - or disconnection from a specific system - should be possible with either API notification via an interface or the click of a single button in the tool.

Data autonomy

Another key factor is data autonomy. Any owner of data stored in the tool should be provided with the possibility to have access to be able to maintain their own profiles if desired. This is facilitated by features like Single Sign On (SSO), Self-registration, and will often be provided via online portal access. Flexible role-based access will allow travellers, travel managers and HR staff the ability to manage profiles either individually or en masse.

Other key factors

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SCOPE & IMPLEMENTATION

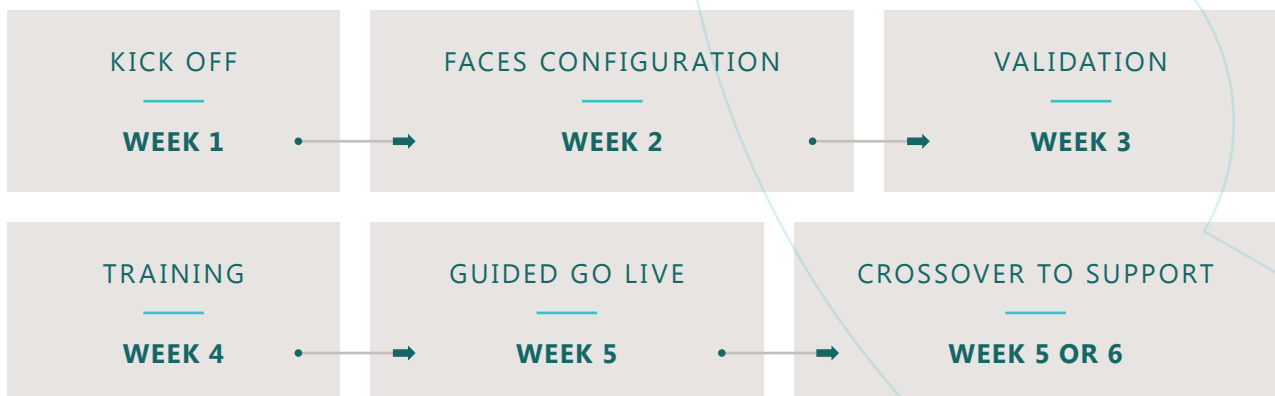Implementations are defined as either **standard** or **large** implementations.

Standard implementation

Characteristics

— **One booking source (GDS, OBT) available in Umbrella Faces**
— **One country**
— **One business unit**
— **Implementation time < 8 weeks**

Standard implementation

Although the delivery time of such an implementation process cannot be exactly defined, an estimation for a standard implementation can be made based on prior experience.

KICK OFF	FACES CONFIGURATION	VALIDATION
WEEK 1	WEEK 2	WEEK 3

TRAINING	GUIDED GO LIVE	CROSSOVER TO SUPPORT
WEEK 4	WEEK 5	WEEK 5 OR 6

Large implementation

Characteristics

— **Multiple booking sources**
— **Booking source integration necessary**
— **Multinational**
— **Several business units**
— **Implementation time > 8 weeks**

### Implementation

The complexity of an implementation depends on

— **The number of booking tools to be integrated**
— **The number of agencies to be implemented**
— **The similarity of the individual agency setups**

Number of Booking tools

When three or more systems are to be integrated then the project can be classified as a large implementation. If these systems already integrated within the profile software, then the factors to be considered are:

Mapping and the setup on the partner systems' side

Before starting to set up the various tools within the platform, a detailed list of all the fields available within the required external tools should be created. This should then be defined as to how they should be mapped to the profile software.
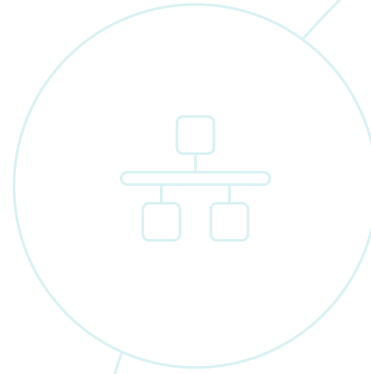
In case of a TA/TMC having several OBTs, it is better to have the backend data (customer metadata, or account identifiers for example) be the same for each custom field. Unification of this part of the dataset helps to avoid potential causes of data overwrite or data loss through unintentional overwrites, especially when bidirectional systems are connected. Good, well-documented mapping also facilitates easy import of profiles and connection of future systems.

Project segregation based on booking tools

This is necessary to avoid chaos during the roll-out of the tool. After the GDSs/OBTs have been set up, profiles should be imported from one, primary source then published to each interface in turn. Verifying that the profiles are fully functional in each connected interface before rolling out the next is crucial to avoid synchronicity problems that can multiply exponentially if left unchecked. This is a critical part of the deployment process of any profile management tool. Whilst it may elongate the actual deployment process it will, in almost every scenario, avoid complex and time-consuming corrective work after the fact.

New systems and their connection

If a system is not yet integrated, then there are a number of available paths to the TA/TMC. One is to verify whether it can be substituted with an existing integration, or whether a new interface needs to be built. New interfaces directly impact the implementation period as they can be time-consuming, and each implementation of a new interface is bespoke. The time and cost involved in connecting a new system are dependent on a number of factors. These can include the direction of development (i.e. either from the tool to the new system's API or from the new system to the tool's existing API), the engagement of the new system to the project, the available documentation and, of course, the competence of the developers involved. The direction of development is also important in the control of the time taken, with inbound development (from the new system to the profile tool) sitting outside of the profile tool's ability to influence.

TOOL SELECTION

There are several factors to be considered when choosing the right profile management tool. Below you will find a set of criteria that represent the main factors, derived from many years of experience with TA/TMCs and corporates alike.

EXPERIENCE

Substantial existing user-base	✔
Proficient experience in travel technology	✔
International project experience	✔
Global footprint	✔

CONNECTIVITY

Real-time API data interfaces with all relevant booking systems	✔
Bidirectional data flow with bookings engines and apps	✔
Easy connection for Single Sign On (via SAML, OAuth, HMAC...)	✔
Bidirectional, real-time API services for synchronization with in-house systems	✔
Bidirectional, real-time API services for on-demand data transfer to/from in-house systems	✔

DATA IMPORT

Easy automation of any HR feed	✔
Mass-updates for profile data Excel/CSV	✔

DATA SECURITY

GDPR audited	✔
ISO27001 certified data center	✔
PCI/DSS compliant	✔
Periodic penetration tests	✔

INFRASTRUCTURE

High security data hosting (Nine/Switzerland or cloud-based with Amazon Webservices)	✔

PRODUCT

UI settings for relevant languages	✔
UI is optimized for multiple device types (desktop, laptop, tablet, smartphone)	✔
Role model for access	✔
Automatic profile reminders for • expiring credit cards • expiring visa • expiring travel documents	✔

CUSTOMIZATION

White-label options	✔
Individual setup, definition and access rights for data fields	✔
Up to 5 pre-defined authorization levels	✔
Self-registration options	✔
Manual profile creation in Umbrella or through inbound APIs	✔

SERVICE

New data interfaces built in only 5 to 10 days development	✔
Accurate M.I. data capture using fully customisable data-validation methods (Regex/drop-down lists etc)	✔

SUCCESS FACTORS

The following factors play an important role in the time taken to successfully integrate profile solutions.

Implementation strategy and concept for multiple agencies

Where multiple agencies are involved, it is critically important to know if all setups are the same. If the setups are the same, then it is a simple process to use the same sync template across all agencies. Should the setups be similar, then a copy can be created and uploaded to the other agencies before further customized updates are made. Where each setup is entirely different, then individual mapping must be done for each agency. This is the most time-consuming option.

In case of multiple agencies, it is advisable to split the implementation per agency and then, as with individual systems, roll out to each agency and system in turn. One could also opt to implement only one agency as a pilot project to see how well the process goes and how well the TA/TMC can use the tool before deciding whether to then fully deploy the tool across the group of agencies.

If a customization across the group of agencies is necessary i.e., using a white label solution, then agency bundling under a "circle" is necessary. Agencies in the same circle will receive the same settings and configurations for many aspects of a given tool. It is important to note that the features of a circle are constant for all agencies and cannot be adjusted/ be applicable just for some agencies under the circle. Depending on what exactly must be developed for the circle, this can be complex work that directly affects the delivery time.

The golden rule for implementing several agencies successfully is for the project lead to have sight of all agencies, clarifying their needs upfront and comparing the desires of each agency against the rest, keeping all stakeholders informed of the specific limitations and advantages of being in a "circle" and, crucially, keeping all agencies in the loop regarding the project progress.

Project management

A TA/ TMC should have someone in charge of the project. This key stakeholder is responsible for the internal project planning and communication of the project details in coordination with the PTC. They therefore should be well acquainted with the systems to which they want to connect or import profiles and have an understanding of how profile synchronization / profile solutions work.

The project leads at both the TA/TMC and PTC must factor both human and financial resources in the planning and adhere as closely as possible to the implementation plan. This is a key factor to delivering the tool in a timely fashion experience shows that a profile tool integration can quickly slide down an organization's priority list based on trading factors such as new fares, customers, urgent requirements in booking systems, or even force majeure and so on. Clearly, project priority has an immediate impact to project success and maintaining momentum during the implementation phase requires effort from both sides that cannot be underestimated. In addition to that, the number of profiles to be hosted and the point of entry must be considered in the planning. Should profiles be hosted in a system that is not yet integrated within the profile management tool at projected go-live, then a way of profile import must be determined before the project kick-off.

Often a minimum-viable-product (MVP) approach may be taken to ensure a quick route-to-market inside of the agency or circle of agencies, with then future phases of development and deployment planned to integrate the disconnected system. It remains crucial to see through all phases of a project, as it is all too easy to leave loose ends that would defeat the object of having a synchronous, connected system architecture, simply because the initial project phase has gone live. In the long run,

the path chosen should reflect factors such as need, priority and the TA/TMC's longer-term growth and systems strategy to achieve success.

Nature of profiles

Many TAs/TMC believe that they have well-managed profiles, just not a great profile management tool. The tool provider is then given the impression that no profile data clean-up is needed. The challenge however arises when the data import attempt is made, and this fails with several errors. Such a transaction must then be stopped, and a profile clean-up must be performed prior to continuing with the import process. Depending on the profile volume and import method, this can quickly become tedious.

It should be noted that the clean-up of profiles can happen in many different ways, and as such a good PTC will offer a number of solutions for you to work with your data to get it into an acceptable format.

These can include:

- **Cleansing the profiles prior to import**
- **Using the profile tool itself to cleanse profile data after import**
- **Starting from scratch (full repopulation of data)**
- **Creating shell profiles from existing data and allowing travellers to complete them (partial re-population)**

The method chosen during the implementation will take into account a number of factors, including the age of the current data, ease of method alongside the number of profiles to be imported. Crucially, one chosen path may be best for one agent and not another, so the PTC should take a consultative approach during this phase.

It is important therefore to understand the current state of the profiles stored at the TA/TMC prior to any attempt at synchronisation. This is often where projects can stall if not given the correct attention. Data cleansing is, after all, not the most glamourous work, however, it is an important part of not only successfully implementing a profile management tool, but also achieving GDPR compliance as part of that process. No data should be transferred or stored if it can be considered inactive or superfluous.

In this respect, the capability of the profile tool to validate, correct or reject incoming data is also of considerable importance. Data that is ignored without backup or warning due to errors during the synchronisation process could lead to significant data loss if not monitored. It is therefore advisable to not only create a data backup before commencing with profile import, but also to clarify how data loss can be prevented and how any import failure is captured and reported before selecting a tool.

After selection, sample profiles should be disclosed to the PTC so that their project lead can determine if there is a need for prior data clean-up and to what extent. Only once data has been validated as compliant, or that any erroneous data has been identified as discardable should the project proceed.

CONCLUSION

In conclusion, implementing an effective traveler profile management tool is essential for TAs and TMCs to streamline operations, enhance data consistency, and ensure data security. To achieve this, they must consider factors such as scalability, transferability, and data autonomy during the selection process. Efficient project management, a well-planned strategy for multiple agencies, and thorough data clean-up before implementation are crucial for success. By carefully considering these factors and diligently following the implementation process, TAs and TMCs can optimize their business operations and enhance the overall travel experience for their clients.