

輕視資訊科技 將來悔之已晚

Ignore IT at your peril

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(編按：過去三年，香港資訊科技商會完成了旅遊業資訊科技推廣計劃。該計劃分為兩個階段，由商會的執委會成員兼教育工作小組召集人黃岳永先生和陳俊明先生負責推行，並且得到議會的協助和政府資訊科技總監辦公室的贊助，旨在向旅行社行業推廣資訊科技的應用。本文的內容摘自黃先生和陳先生所撰寫的小冊子：《旅行社 I.T. 錦囊》和《旅行社 CRM 錦囊》。兩本小冊子都已寄給會員，並可在議會的網站下載：<<http://www.tichk.org/public/website/b5/faqs/it/links/html>>。)

(Editor's note: In the past three years, the Hong Kong Information Technology Federation (HKITF), with help from the TIC and sponsorship from the Office of the Government Chief Information Officer, has carried out the e-Transformation for the Travel Industry campaign aimed at promoting IT adoption in the travel agent industry. Mr Erwin Huang, a Council Member of the HKITF and Convenor of its Education Working Group, and Mr Eddie Chan took charge of the two-phase project. This article is extracted from the two project booklets, Travel Agent I.T. FAQ and Travel Agent CRM FAQ, written by Mr Huang and Mr Chan. Copies of them have already been sent to members, and they can also be downloaded from the TIC website at <<http://www.tichk.org/public/website/en/faqs/it/links/html>>.)

計劃成果撮要

第一階段(資訊科技個別顧問服務、一個座談會、一本小冊子)：在二零零四至零五年推行，焦點有兩個，一是辦公室自動化問題(包括垃圾電郵、系統保安、網絡管理等)，二是由資訊科技(特別是互聯網)所引發的營商環境的根本改變，這種改變令旅行社的中間人角色面臨嚴峻挑戰。

第二階段(顧客關係管理(CRM)個別顧問服務、兩個座談會及兩個資訊科技方案展覽、一本小冊子)：在二零零五至零六年推行，展示了五家旅行社的五種不同顧客關係管理模式。此外，顧客關係管理方案供應商並且闡述了各種類型的方案。這個階段還提出了一個使中小型旅行社憑藉「迅始點」而可輕易推行顧客關係管理的建議。

從這些東西學到甚麼？

香港的旅行社大多數都是中小型旅行社(大約九成旅行社的僱員不足十人)。就資訊科技的應用而言，它們眼前的問題最可能與辦公室自動化有關，可是，真正的挑戰其實是怎樣推行一個以資訊科技為核心兼且以客為本的營運模式，從而挽回它們的中間人角色可能消失的終局。這次所提出的建議，是採用以資訊科技(包括互聯網)為核心的顧客關係管理方式，以應付由資訊科技(特別是互聯網)所引起的種種問題。

顧客關係管理並不是甚麼新概念。任何一家旅行社都

Summary of results

Phase 1 (IT consultancy clinic sessions, a seminar and a booklet) was conducted in 2004/05 and focused on Office Automation (OA) issues, including email spamming, security and networking, and a paradigm shift in the business environment of travel agents, induced by IT (particularly the Internet) and severely challenging their role as middleman.

Phase 2 (Customer Relationship Management (CRM) consultancy clinic sessions, two seminars with two IT solution fairs and a booklet) was conducted in 2005/06 and showcased five different CRM models adopted by five travel agents, with CRM solution providers illustrating their various kinds of solution approaches. A light way for small- and medium-sized (SME) agents to implement their own CRM (executing via "quick-start anchors") was proposed.

What can I learn from all this?

Most travel agents in Hong Kong are SMEs (about 90% of them have less than 10 employees). Whereas their immediate concern, as far as IT adoption is concerned, is most likely to be OA issues, their real challenge actually lies in adopting an IT-enabled customer-centric business approach in response to the potential cutting out of their middleman role. CRM enabled by IT (together with the Internet) is the very solution proposed to those problems caused by IT, especially the Internet.

CRM is no new concept. Every travel agent can claim that it has already adopted CRM since keeping customer records, offering promotions to customers, especially those loyal ones, etc are what customer relationship management is all about. But the point is: how can SME agents jump-start their own


能聲稱自己已實行顧客關係管理，因為處理顧客紀錄，提供推廣優惠給顧客(特別是熟客)等等，正是「顧客關係管理」的含義。但問題是，中小型旅行社怎樣開展以資訊科技為核心的顧客關係管理？中小型旅行社在時間、財力、人力等方面的資源並不充裕，要提高成功的機會，最好是採用這次所建議的輕易方法。該方法建基於三個很重要的原則：低預算、快回報、少干擾，並且以互聯網為主，因為它成本低、易於親自實行，但又成效大、覆蓋範圍廣。

這次建議的輕易方法通過六個「迅始點」推行，即網站、名單管理、編製內容自動化、大量發放電郵管理機制、顧客資料整合數據庫、顧客聯絡紀錄。但再繼續之前，要先看看究竟甚麼是「迅始點」。

「迅始點」是甚麼？

「迅始點」指在目前的營運中正擔當重要角色或逐漸成為重要角色的組成部份、範圍或功能；如果「迅始點」得以改善，就能在短期內帶來好處，而且極容易使其他的組成部份、範圍或功能都陸續出現改善。因此，「迅始點」不妨視為中小型旅行社在顧客關係管理改革路途上的觸發點。

要確認「迅始點」，可觀察易於變成障礙的地方，那些地方正可能是「迅始點」。在推行「迅始點」的各個階段時，應將每個階段的開支都規劃成獨立的單位。換言之，推行某個階段而產生的轉變，已足以為旅行社帶來裨益，而無須理會下一個階段是否實行。這樣一來，每個階段的開支全都用於本身(低預算)，成果又立竿見影(快回報)，而且對營運造成的干擾都局限於每個階段，不會波及其他階段(少干擾)。

本文的內容、已寄給議會會員的小冊子，甚或整個計劃所提出的方案，都可能不夠全面，不足以為旅行社提供即時解決現有經營問題的方法。可是，如果旅行社能因此而有了新視野，並產生了有益處的新意念，這已足以使所有參與這個計劃的人舉杯慶祝了！

IT-enabled CRM system? With limited resources in terms of time, finance and staff, they stand a good chance of success if they adopt a light way based on three important principles: lean budget, quick return and least disturbance, with the use of the Internet being a priority because of its low-cost, hands-on, easy implementation, and yet effective and extensive coverage.

The light way proposed is implemented through six "quick-start anchors", namely website, list management, content generation automation, mass emailing mechanism and management, integrated customer database and customer contact log. But before we move on, let us first take a look at what a "quick-start anchor" is.

What is a "quick-start anchor"?

A "quick-start anchor" refers to an existing component, a part or a function in the current business operation that is playing an important role, or is growing in importance, and an improvement in it will bring benefits in the short term and will highly likely enable improvements of other components, parts or functions that may take place in sequence. As such, a "quick-start anchor" can be taken as a trigger for an SME agent to set foot on its own CRM path.

A "quick-start anchor" can be identified by observing those areas prone to become bottlenecks, which may then be taken as potential "quick-start anchors". In implementing various phases of a "quick-start anchor", the expenses spent on each phase should be designed to be self-contained. That is to say, changes brought about by implementing one phase can already benefit the agent's operation even if the next phase does not materialise. In such a way, the expenses for one phase are spent for itself (lean budget), the fruit is reaped right away (quick return), and the scope of disturbance in operation is restricted to that phase, separate from others (least disturbance).

This article, the booklets sent to TIC members and even the whole campaign may not be all-embracing enough to provide travel agents with a ready solution to their current business problems. Nevertheless, if they can re-orient their perspectives and generate a stream of new ideas they find nourishing, this is all that will make all those who have contributed to the project celebrate! 