



Guadalajara

CLIENT PROFILE: GUADALAJARA

SITUATION: FIND THE BEST CRM FOR YOUR CVB

Industry-specific makes all the difference. Ricardo Gil's first project upon joining the Oficina De Visitantes Y Convenciones De Guadalajara, A.C. (OFVC) was to find the CVB a Customer Relationship Management (CRM) platform. Ricardo spoke with Kevin Bate, Simpleview's Senior Director of Business Development at the DMAI Accreditation training event in León, Mexico in early 2012.

"Here in Mexico, we don't have a platform that covers all of the things the Simpleview CRM does," said Ricardo Gil, Business Intelligence and Information Technology Director at the OFVC. "We have multiple platforms, but not specific to the industry and tourism in Mexico." Ricardo felt they had two options: try to create the system they were looking for themselves, or find a system outside of Mexico. He felt Simpleview offered the platform they were looking for, and by 2015 the CVB and Simpleview teams began working together to implement the Simpleview CRM system.



SOLUTION: EXPERT COLLABORATION

You know your bureau's needs, Simpleview knows the technology to meet those needs.

"As the IT guy of the CVB of Guadalajara, I believe if you see an opportunity where a tool can be implemented to be helpful on a daily basis, then you try to implement that product. That was the case with the CRM." The bureau's goal was to implement Simpleview's industry-specific CRM in place of their current system of spreadsheets.

The OFVC and Simpleview teams worked together to load the data, make certain customizations to the platform to accommodate the CVB's specific daily processes, and to get past any language/translation challenges. The mutual objective was to find the best practices specific to the Guadalajara CVB and Latin American DMOs, and to implement them.

He says it's been an interesting learning process, and one that's still in progress—"I know it's a full universe, the CRM," he says. Onsite trainings have helped, and now, in addition to showing his colleagues the functions they need to know to do their daily work, Ricardo feels he's been able to learn more about IT, other platforms, and digital technologies, in order to know which customizations will work best for his team. While working with Simpleview CRM Analyst James Werner, Ricardo is also gaining an understanding of the complexity of the development of the CRM and the breadth of what the platform can do. For instance, while James and his team focused on making sure the economic impact calculates correctly with the right taxes and formulas, Ricardo and his team focused on tracking in-kinds and expenses to win leads.



We have seen through history, someone who wants to start running before walking, they fall down. Better to go at a slow pace and complete everything in best practice."

Ricardo Gil,
Business Intelligence and Information
Technology Director at the OFVC



**Simpleview
CRM is
Efficient
Consistent
Organized
& Accessible**

RESULTS: GREATER EFFICIENCY FOR YOUR BUREAU AND YOUR CLIENTS

Consistent information, efficiently organized and easily accessible. Ricardo and his team appreciate the consistency and timeliness the CRM system affords, especially when it comes to keeping track of and communicating with contacts. "At this point it has been useful for us in the matter of internal communication," says Ricardo. "Before the CRM, it was up to the group to keep notes on a business trip or vacation. Or a client would call with one of us and one month later was speaking with another of us, so both needed to know the progress with the CVB. We now have the ability to get to know the process, who is the manager, how to follow up with that client in real time. Everyone knows what everyone is doing.

Now, instead of everybody having their own data sheet for their clients, we have a main database with the information of all clients. So if I want a colleague's info, I will find it in the CRM, I don't have to wait."

The Simpleview CRM assists the team with internal processes, as well, when they follow up on client petitions. The system helps them cut down on customer response time. "Once the information is in CRM, everyone involved knows in real time what they have to do. Instead of having the client response in two days, we have a response in 24 hours."



Ricardo's advice to new users:
"Don't be afraid to take new challenges. I believe that everyone has their own fears, but if you don't challenge them you will stay always in a small position. That's the beauty of taking risks, you will learn and you will grow from each risk you take."

Through close collaboration, consistent communication, and dedication to specific goals, the Guadalajara CVB and Simpleview have moved the bureau miles forward from spreadsheets with various owners to one database with consistent client information that fast-tracks customer response time.

While the difference the CRM platform has made for the CVB is impressive, Ricardo, James and their respective teams have truly illustrated another vital component to client success stories, the importance of not just the right tools, but solid relationships, as highlighted in Simpleview's vision statement: Simpleview: THE standard for integrated destination marketing solutions built on experienced leadership and meaningful relationships.

