CapTech®

Franchise Automation at a Top 5 Global Hotel Chain

salesforce

SUMMARY

When a Top 5 Global Hotel Chain wanted to convert its existing manual franchising disclosure, application, and approval process, it engaged CapTech to develop an efficient, digital tool to support internal team members, as well as existing and new or potential franchisees. CapTech and the hotel chain collaborated to create a mobile-friendly, authenticated Salesforce Experience Cloud site that provided a consistent, self-service experience externally while also automating all internal processes from the lead stage through to contract execution. This resulted in a streamlined user experience, enhanced and clear reporting, and an increased number of signed Franchise Disclosure Documents (FDDs) and approved applications, while decreasing the time spent on administrative and manual processes across the organization.

CHALLENGE

The franchise disclosure and application submission process, as well as the processing and decision-making procedures at a Top 5 Global Hotel Chain featured hundreds of manual steps for both external and internal users.

FDDs had to be manually updated and signed by applicants each year to align to legal and compliance requirements, and application packets were typically mailed in and required numerous follow ups with applicants to obtain missing or incomplete information. The internal review team utilized handwritten notes and checklists in the application review process, leading to delays in approval time.

CLIENT
Top 5 Global Hotel Chain

INDUSTRY
Travel & Hospitality

SERVICES
Salesforce
Experience Cloud
Lightning Flow
Lightning Web Components

The internal review and approval processes were manually managed through emails and spreadsheets, which relied on time-consuming administrative tasks and reminders with little to no visibility across teams. This prolonged process caused some potential franchisees to seek opportunities with competitors who had more user-friendly disclosure and application systems in place.

The hotel chain had made an investment in Salesforce and wanted to leverage automation capabilities to improve the franchise disclosure and application process. CapTech helped create a customized "Franchise 360" model that would improve customer experience with a self-service portal, automate the disclosure, application, and approval process, and support users from the application phase, through approval, and beyond.

THE APPROACH

In March of 2018, the CapTech team met with the hotel chain's staff to map out the disclosure, application, and franchise process from beginning to end, including all documentation and checklists currently in use. Based on the information obtained, CapTech then developed a comprehensive recommendation leveraging Salesforce Experience Cloud. A working version of the initial solution was in place by August, and the full solution went live both internally and externally by the end of the year.

Key elements of this approach included:

- Building a microsite for the review and signing of FDD documents, as well as processes for the maintenance and update of FDD documents each year

- Developing the logged-in experience of the applicant and owner's portal, allowing applicants to submit their applications and view and update their existing property information and ownership structure(s)

- Turning paper applications and checklists into standard and custom objects in Salesforce, which gave employees access to reporting tools and dashboards in one centralized location and minimized touch points in the application process

- Allowing applicants to track the status of current and previous applications, as well as make any adjustments or upload additional documentation through the portal at the request of the hotel development team

- Training hotel development team members to maintain and use the new system; "Super Users" were identified and empowered to make changes within the system

- Building best-in-class and flexible application approval capabilities for executives to review and provide feedback on franchise applications using out-of-the-box tools from Salesforce with approvals, escalations, Salesforce mobile, and more

THE RESULTS

- The Salesforce "Franchise 360" Experience Cloud provided a self-service franchise disclosure and application portal for franchise applicants, allowing them to easily submit their application, track application status, and make changes online

- Existing franchisees were empowered with access to a logged-in portal where they can communicate easily with headquarters and receive important updates and documentation regarding their property

- Employees can review application documents online, quickly request additional information from applicants, and automate the approval process using Lightning Flow and Lightning Web Components

- Legal teams can easily update franchise forms and legal documents online as changes occur

- The digital solution has been adapted for the hotel chain to use internationally, maintaining a consistent user experience across Americas, EMEA, and APAC

Increase in the amount of applications processed

Increase in franchisee CSAT

Decrease in hotel launch time

Decrease in internal time spent

Connect with us.

Call **844.373.4025** or visit us at **captechconsulting.com** to start a conversation.

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