

SERIES

CONVERGENCE OF GUEST, BRAND, AND PLATFORM EXPERIENCE

THOUGHT LEADERSHIP

This series examines how the hospitality industry is transitioning through the current state and shares a unified approach to improving customer, brand and platform experiences.

PART-1

PAPER PREMISE

This paper explores the dynamics of the hospitality sector under numerous environments. It gives a quick situational analysis of the COVID disruption, transformation of the hospitality landscape, and multi-dimensional viewpoints of key stakeholders. It gives an account of the changing paradigm of the customer perspective and the role of digital platforms to accelerate business transformation and regain lost ground. It brings in differentiating thoughts of a conglomerate platform to drive change and provides a brief about the entire customer platform landscape with the introduction of the *one* platform that is equipped to function as an entire conglomerate platform. The paper investigates why this *one* platform has more value over proprietary hospitality platforms, and how it is adequate to satisfy the needs of the entire industry. The paper connects market research and strategies that businesses could adopt regarding long-term expenditure and preparation.

PART-1 PREMISE

Cybage studies the current state of the hospitality industry to define its future roadmap. Instead of evaluating COVID-19 disruption in silos, we converge it with digital transformation and the bandwagon of key entities' expectations to deliver solutions for the hospitality industry's value chain needs. Cybage understands the journey will be unique to each hotelier aligned to their strategic business priorities. Our final step has been to translate the results of the analysis into concrete actions to overturn the existing situation and prepare for any unprecedented future.

AUDIENCE

This paper aims at the C-suite of organizations, cross-functional decision-making leaderships, and transformation consultants to define a unified platform roadmap and transform enterprises to fulfill the needs of the next generation customer and align to new norms of a changing business landscape.

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- 1.4 **Overall Situational Analysis** | “Customer First” and “Platforms For Enablement”



2. CUSTOMER PLATFORM Envisioning a Conglomerate Model



3. PROPRIETARY CRM IN HOSPITALITY Unveiling the *One*Platform



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PART-1

SITUATIONAL ANALYSIS HOSPITALITY LANDSCAPE

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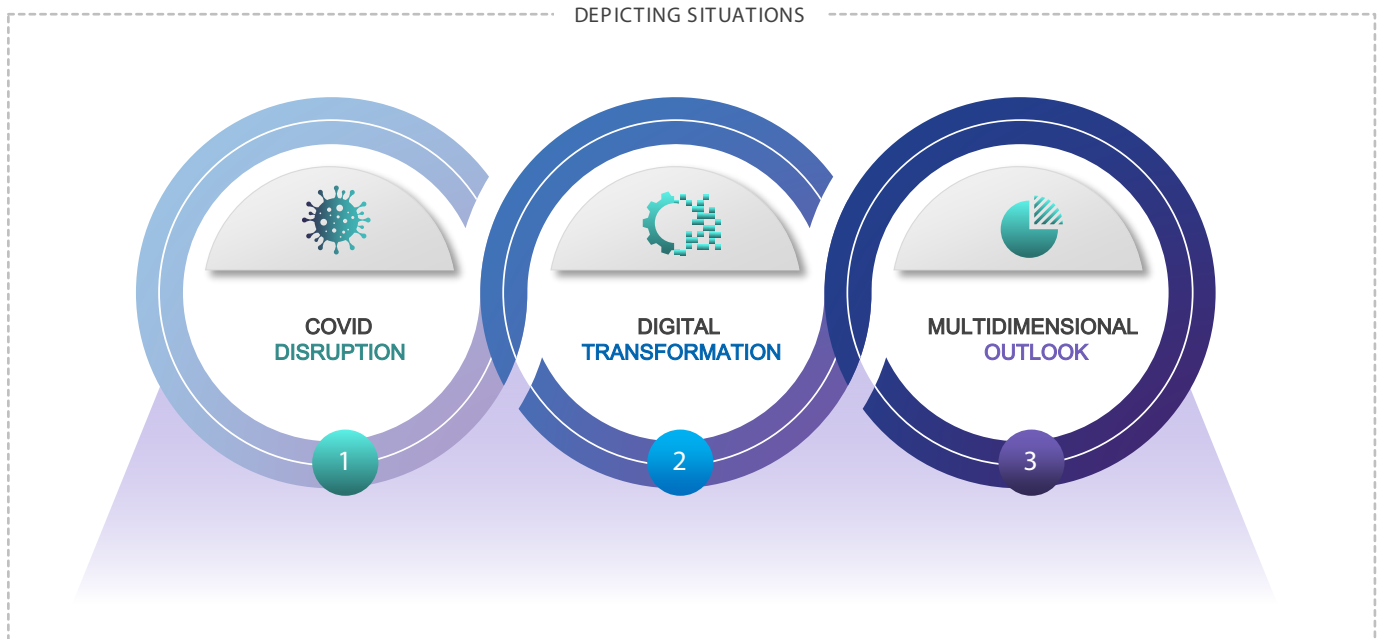
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1. SITUATIONAL ANALYSIS :Hospitality Landscape

The hospitality industry has been caught in the middle of severe disruption caused by the COVID outbreak and being holistic is imperative for a careful analysis. We are trying to place a multi-pronged analysis to depict the ground-level situation. The idea is to introduce a quick tactical plan and help decision makers in building strategic roadmaps.

To identify the realistic problems of the industry and figure out a concrete action plan, an approach has been adopted after analyzing three **ground-level situations**. [Fig.1] The outcome of each situation will determine specific pointers and direction to build a roadmap and gain momentum.



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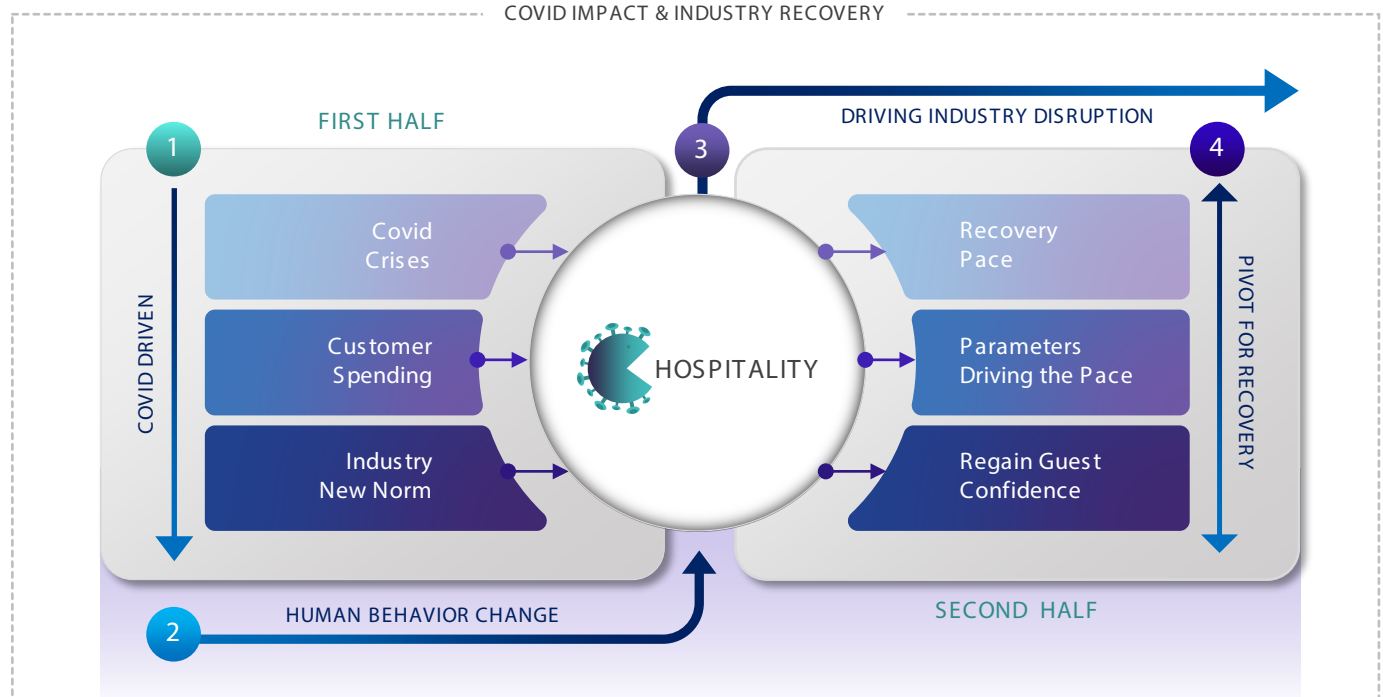
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1.1 HOSPITALITY DISRUPTION Driven by COVID

The COVID-19 pandemic outbreak put a halt to the boom that the hospitality industry was experiencing. Historically, no global crises has ever affected hotels and restaurants like the COVID-19 pandemic. Most hospitality businesses operate with marginal profits, and this has affected every hotelier.

COVID has been driving the whole domino effect. The crisis has forced a change in human behavior that has disrupted the entire industry ecosystem and is forcing businesses to reset for recovery. The complete effect is represented in **4 lags and divided into 2 halves**. [Fig. 1.1A]



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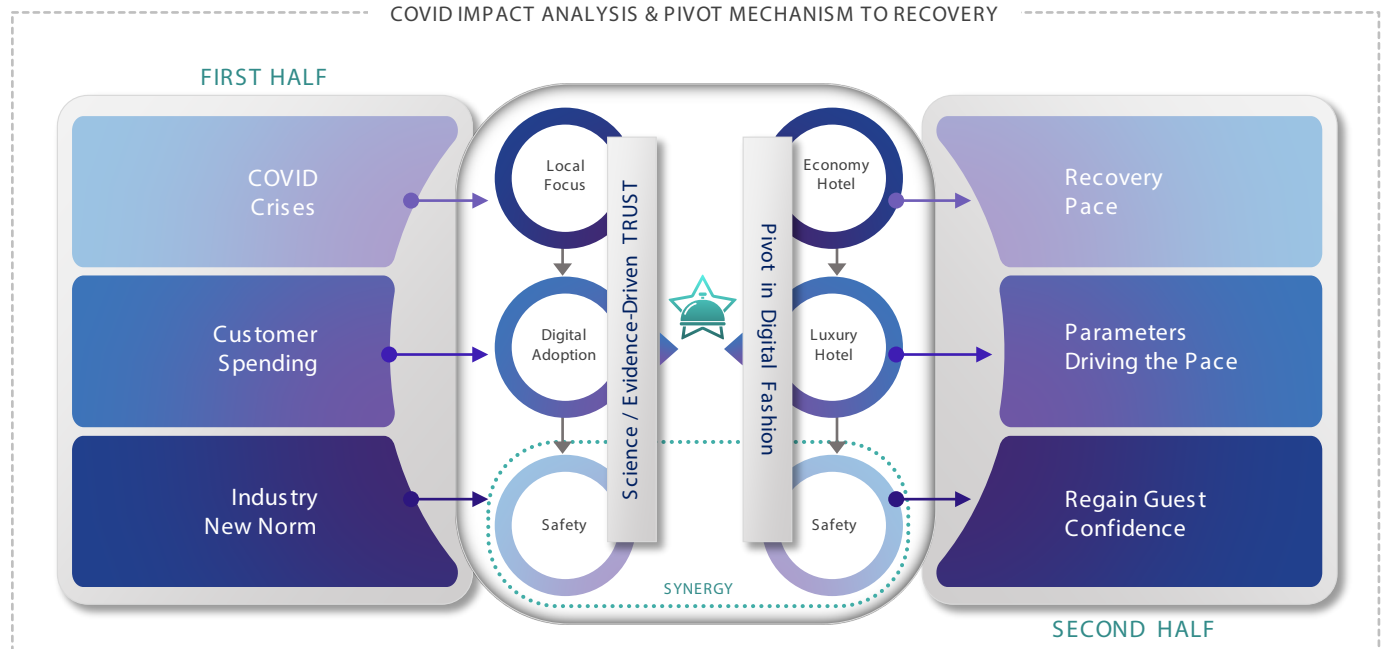
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1.1 HOSPITALITY DISRUPTION Driven by COVID

The COVID crisis is a lot different from anything that the industry has experienced in the past. It is not limited to one geographic area, and only hard science has the potential to solve this difficult situation. The pandemic has changed human behavior; customers are willing to spend more for digitally enabled services for their daily activities. Customers are cautiously spending on travel only when they are assured of a safe environment.

It's time to win back the customer's faith and confidence through technology implementation by furnishing evidence of measures ensuring guest safety and sanitization practices. The way to recovery demands businesses to pivot differently.

Analyzing the effect (1st half) [Fig. 1.1B] shows the outcome is not just disruption, but the factors emerging are beginning to chart a direction for the industry to play upon.



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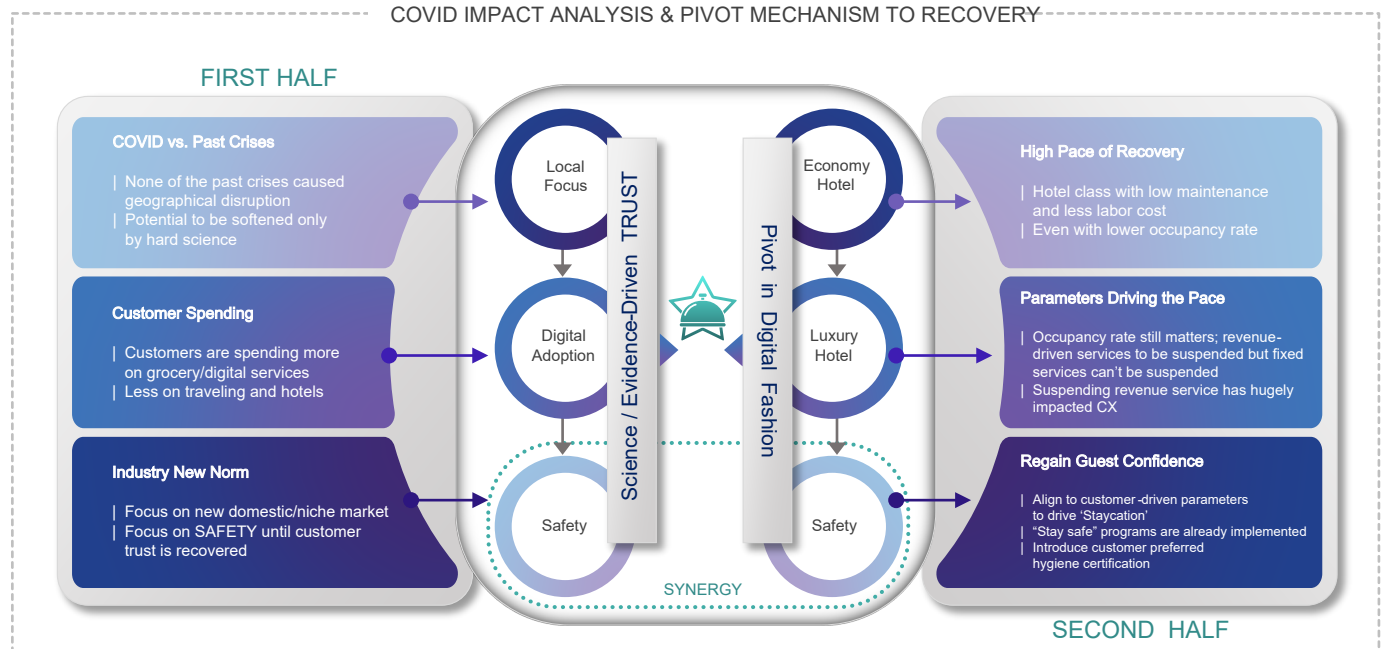
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1.1 HOSPITALITY DISRUPTION Driven by COVID

These factors are “focus on local market”, “strong digital landscape” and “align offerings showcasing safety and enabling it in the digital way” to win the trust of customers and advance in the local/global market. **The entire pivot mechanism (2nd half)** [Fig. 1.1C] sets different stages for the economy and luxury class of hotels. For economy hotels, the path of recovery is easy because of low maintenance costs and more customer inclination. Reverse is the equation for luxury hotels where the recovery is quite stiff.

Luxury hotels are at an advantage when it comes to controlling, customizing, and maintaining customer experiences to add value as a differentiator. Both classes of hotels must advocate promotions and services which are directed towards building customer loyalty. The only way to formalize and fix the pathway is through maximizing digital adoption. Finally, the outcome of both the halves converges in 2 main aspects - “safety of the customer” and “winning customer confidence digitally”.



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1.2 HOSPITALITY TRANSFORMATION- New Normal and Being Future-Ready

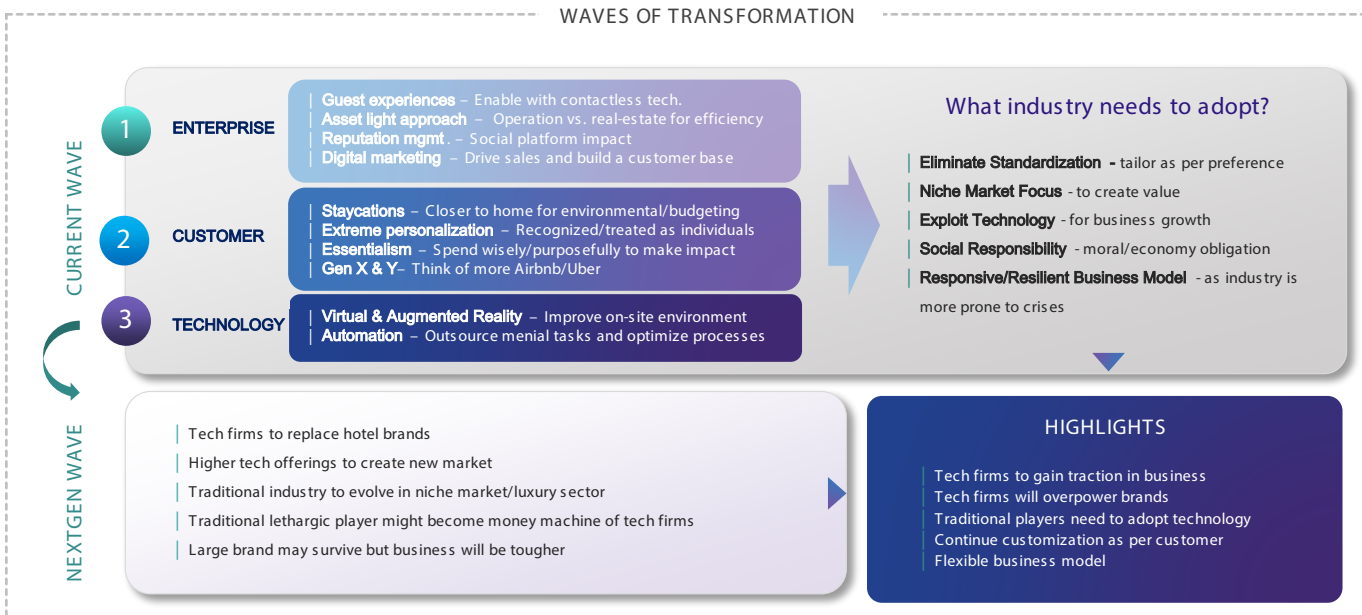
The entire situation is depicted by considering the AS-IS wave, giving rise to the emergence of the factor of adoption at the industry level, and the rise of the next-generation wave. Both are important and converge towards common highlights.

Hospitality's current wave [Fig. 1.2] is taking into consideration:

- | What enterprises are trying to achieve with the method of enablement
- | Customer's outlook and expectations from service providers
- | How technology can come to the rescue of service providers & customers

These are 1:1 in nature, as the whole industry needs to settle down in a holistic manner and adopt the tools for its fulfillment. The next-gen wave will be driven either by pure tech firms or traditional players who are ready to build parallel digital assets along with physical assets in a unified mode to showcase One Smart Hotel.

Convergence of both the emerging factors are heading towards next generation tech firms, tech adoption by traditional players, hyper customization, and a flexible business model as this industry has proved to be more prone to crises.



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1.3 HOSPITALITY MULTI-DIMENSIONAL VIEW Matrix of Customer, Brand, and Tech Firms

We compiled [Fig. 1.3] some survey numbers to figure out the specific expectations of each of these entities. Guest expectations are pointing towards improved experience. The brand movement is to strengthen functional alignment to improve customer service and enhance operational excellence.

Pure tech firms focus on understanding and improving customer needs and collecting data to move closer to the customer in an insightful manner. The eventual crux of the entire survey is "**customer first**" and adaptability of "**platform/tech**" to realize the outcome.

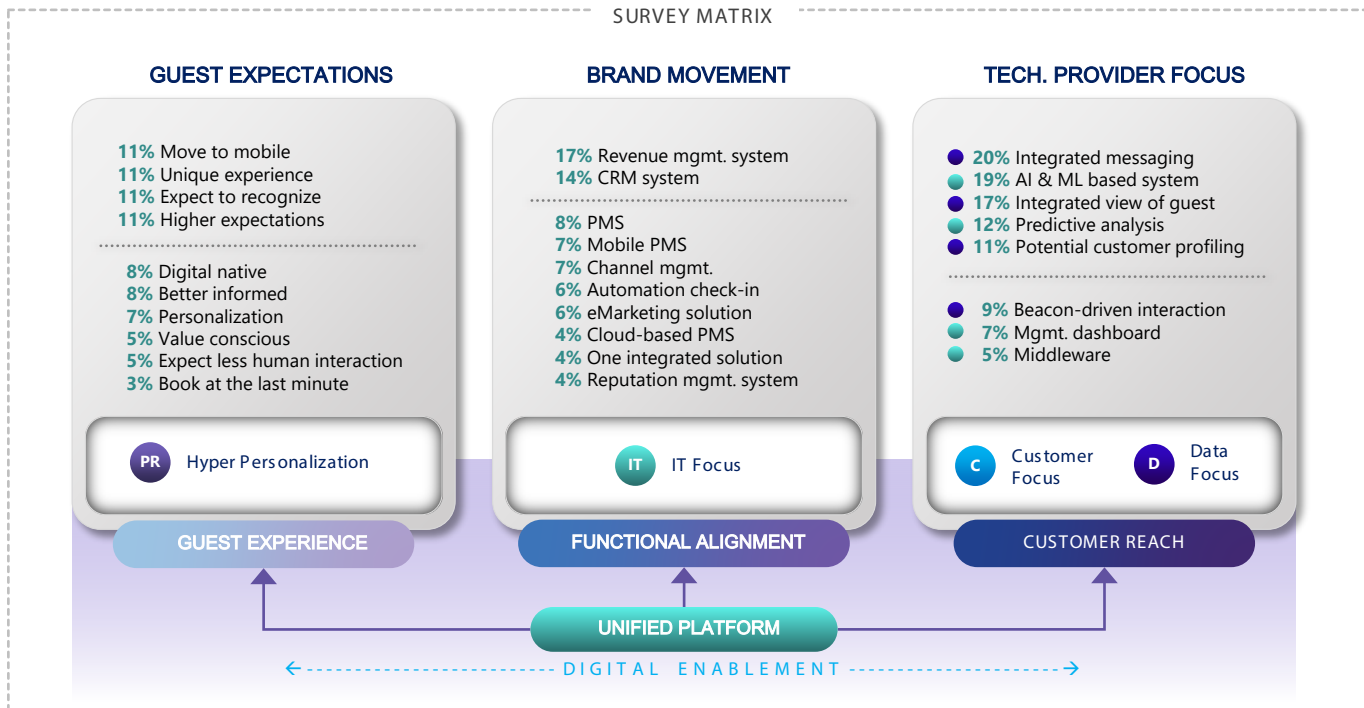


Fig. 1.3

*Source : Hotelnewsresource

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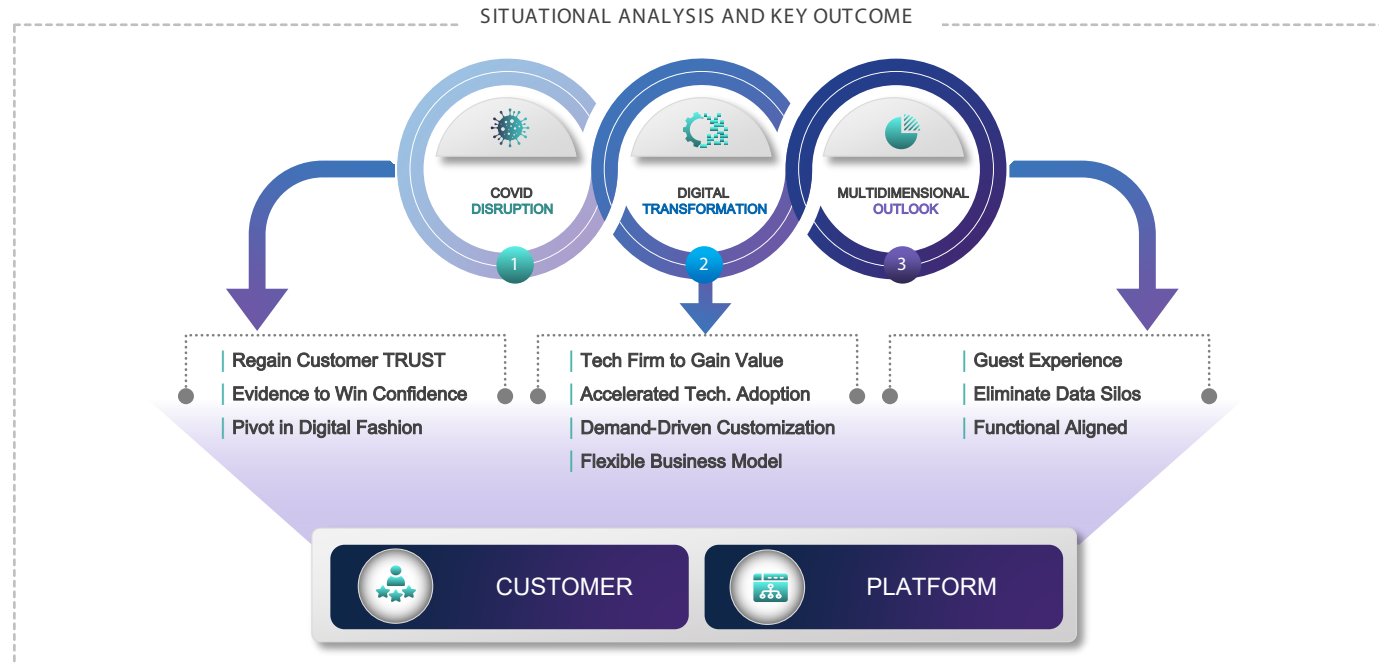
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1.4 OVERALL SITUATIONAL ANALYSIS "Customer First" and "Platforms For Enablement"

The overall analysis [Fig. 1.4] concludes that it is crucial to have a quality customer platform to facilitate rapid tech-adoption by hoteliers and tech firms. An integrated view of the available customer data over distributed IT infrastructure will fuel the process of customer acquisition by regaining their trust and confidence. When in silos, data is unclear and lacks importance. Combined systems will eliminate the data discrepancies producing clean

useful data to understand guest expectations and optimize functions accordingly. Digitalization will help hoteliers provide more access to the users to customize the services they need, giving flexibility to the overall business model. This will help bring value to customers, raise awareness among guests, and adapt to the innovative approach to overcome this crisis and gain momentum over recovery in an established manner.



NEXT PART

WHAT'S COMING NEXT? CUSTOMER PLATFORM

2. WHAT'S COMING NEXT Customer Platform

In the next part, we will learn about market research and the customer platform landscape and how the ISVs are evolving in their positioning to serve the enterprise customer in a better way by aligning themselves to fulfill the legacy gap. We will also extend the customer and platform stories by envisioning a unified solution, justifying the solution with specifics, and identifying the *one* magical platform that will meet the needs of the analysis outcome.

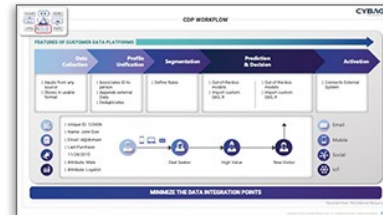
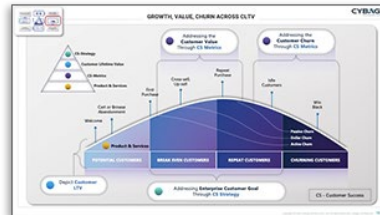
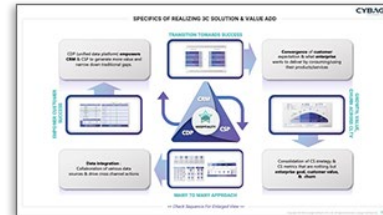
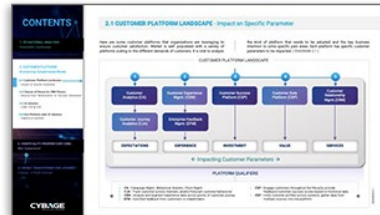
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PART-2 HIGHLIGHTS



Stay tuned for PART-2...



THANK YOU!



Cybage Software is a technology consulting organization specializing in outsourced product engineering services. As a leader in the technology and product engineering space, Cybage works with some of the world's best Independent Software Vendors (ISVs).

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