

CRM Dashboard for Travel & Tourism Agencies

A user-centered concept that brings customer, booking, payment, reminder, and travel-history information into one focused workspace.

CRM DESIGN

TRAVEL AGENCIES

UX RESEARCH

Designing a focused CRM for everyday agency work

For small and medium-sized travel and tourism agencies managing customers, bookings, and operational information across separate tools.

MY ROLE UX/Product Designer & Researcher • **SCOPE** Research → product definition → prototyping → usability evaluation

WHAT I DESIGNED

A CRM dashboard prototype

A single interface for customer profiles, travel history, bookings, payments, reminders, and daily activity.

User-centered design grounded in agency workflows

WHO

Travel & tourism agents

People handling customer inquiries, bookings, payments, and follow-ups.

PROBLEM

Fragmented work

Important information was spread across Excel, email, messages, and separate files.

GOAL

One clear workspace

Make information faster to find and everyday tasks easier to follow.

The work was not one task, it was a chain of connected responsibilities

Agents needed to move between customer history, bookings, payments, reminders, and operational information throughout the day.

1

Information fragmentation

Customer and booking details lived in different places, making retrieval slower and less consistent.

2

Manual follow-up

Payment checks and customer follow-ups depended on memory or separate notes.

3

Repeated searching

Agents often had to search across files, Excel sheets, emails, or messages to rebuild context.

4

Weak visibility

Booking progress and important daily actions were not visible together in one operational view.

Design implication The product needed to reduce context switching while keeping the workflow familiar to agents.

Understand the real workflow before defining the interface

Observations and interviews showed how agents manage their daily work. The findings were grouped into key themes and used to define the CRM requirements.

METHODS

Observation

Interviews

Affinity mapping

Thematic analysis

Workflow analysis

Usability testing

Research → requirements → prototype

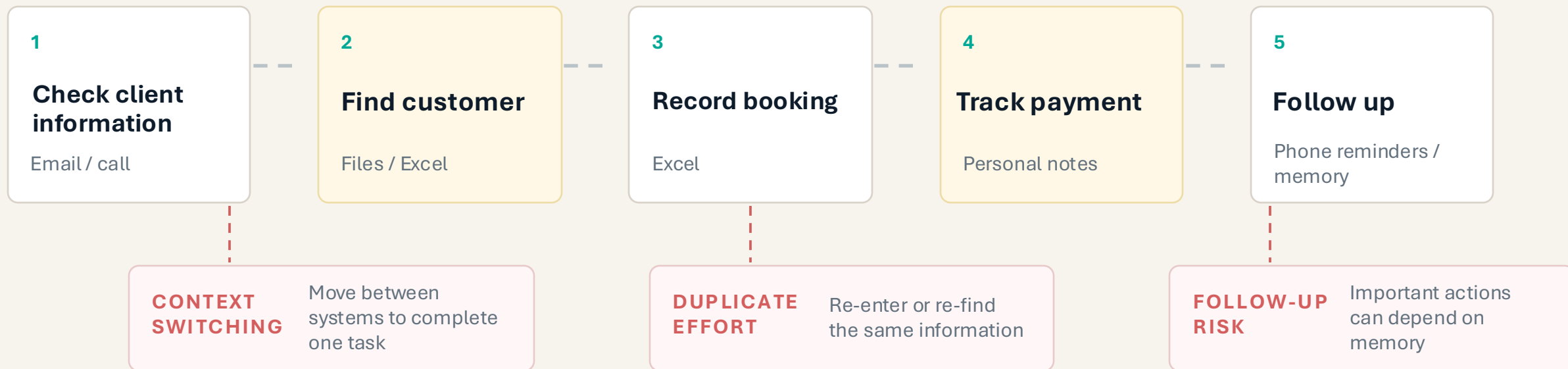
The findings were synthesized into requirements for faster customer retrieval, clearer booking progress, better visibility of payments and follow-ups, and a simple overview of daily tasks.

MOST IMPORTANT INSIGHTS

- Customer details need to be available quickly, not reconstructed from multiple sources.
- Bookings, payments, and reminders are part of the same customer-management workflow.
- Visible progress helps agents understand where they are in the booking process.
- A focused tool can be more appropriate than a complex, feature-heavy CRM for smaller agencies.

Too many handoffs between tools for one customer journey

The same booking could require repeated searches, manual updates, and separate follow-up tracking.



A practical archetype: the multitasking travel agent

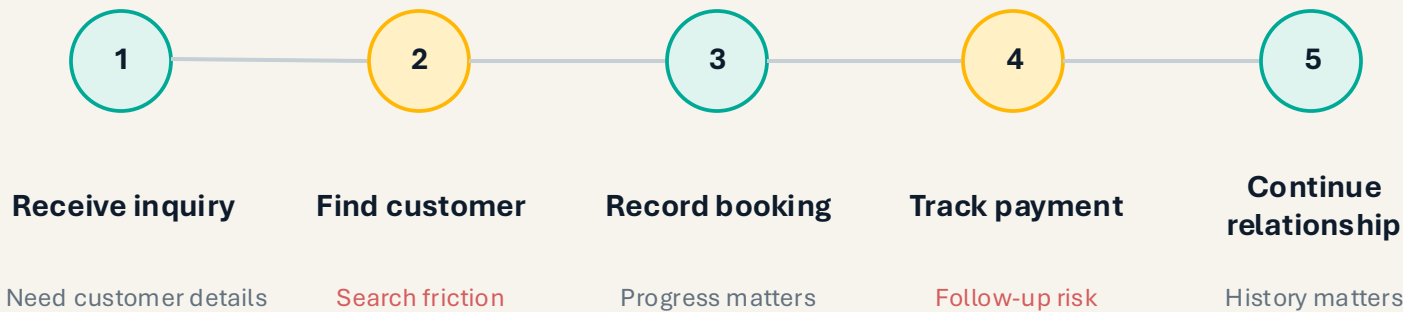
Only the behaviors that influenced product decisions were kept in the case study.

Travel & Tourism Agent

NEEDS

- Find customer details fast
- Manage booking easily
- Know what needs follow-up
- Avoid unnecessary complexity

JOURNEY HIGHLIGHTS



Key opportunity Keep details, status, and follow-up actions connected across the journey.

Turn research themes into a focused product scope

Affinity mapping and workflow analysis were used to group repeated needs and identify the functions that belonged together.

CUSTOMER

Profile · contact details · travel history

BOOKING

Booking steps · status · summary · cost

PAYMENT

Payable amount · payment-related information

REMINDERS

Customer and payment follow-ups

OVERVIEW

Important activity visible from one dashboard

PRODUCT PRINCIPLES

One place for core context

Fast retrieval

Quick booking creation

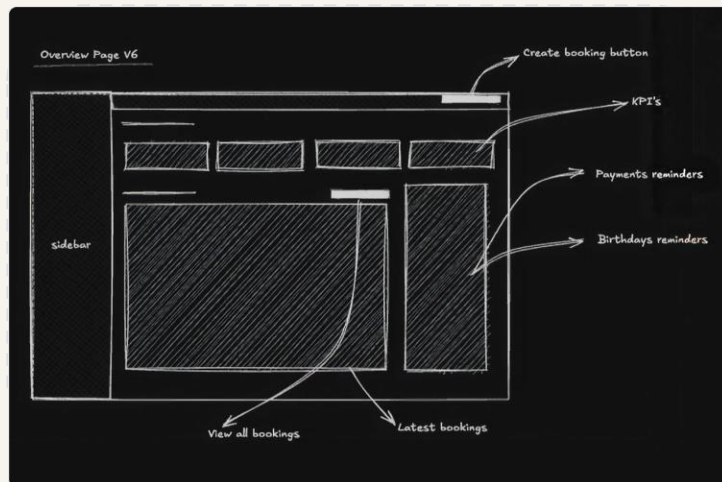
Simple daily prioritization

From structure to a polished interface

The interface evolved through progressively higher fidelity, refining hierarchy, information structure, and interaction detail.

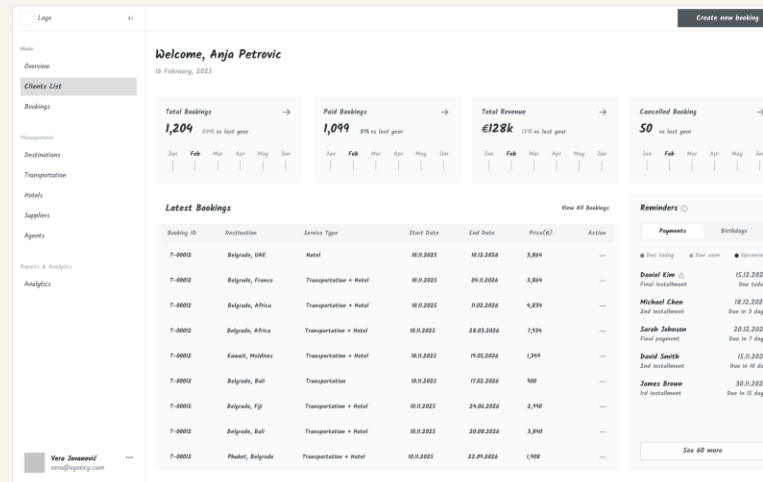
LOW FIDELITY

Structure & task sequence



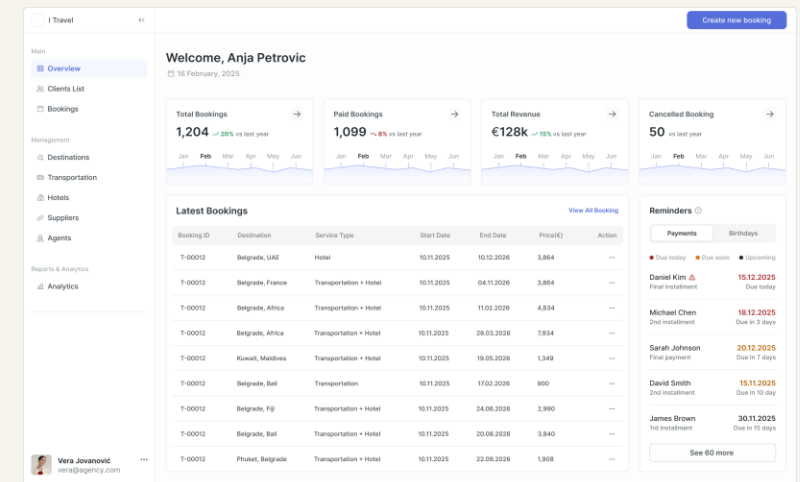
MID FIDELITY

Components & information grouping



HIGH FIDELITY

Visual hierarchy & interaction detail

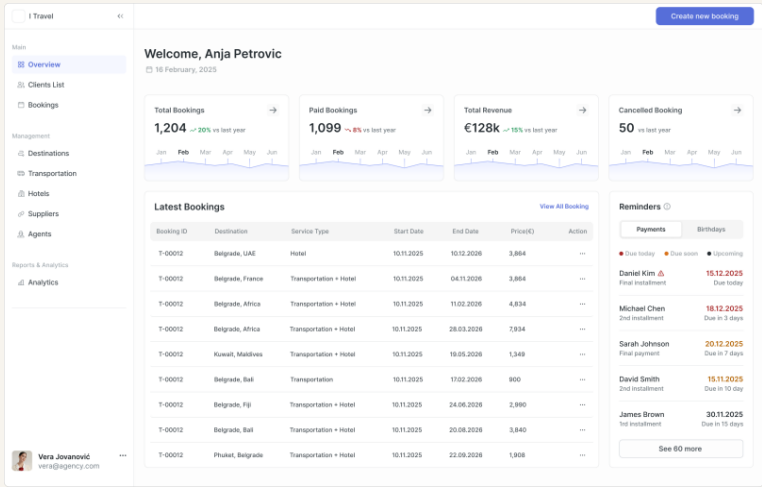


Concept and user flow defined the structure before wireframing; usability testing followed the high-fidelity prototype.

The final interface centers on three key views

Daily activity, customer context, and booking progress come together in one focused workspace.

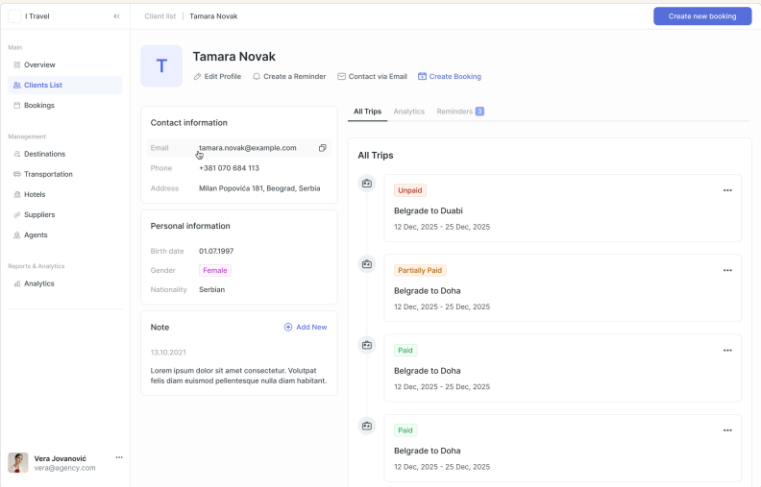
DASHBOARD



DAILY OVERVIEW

Bookings, reminders, and priority activity visible together.

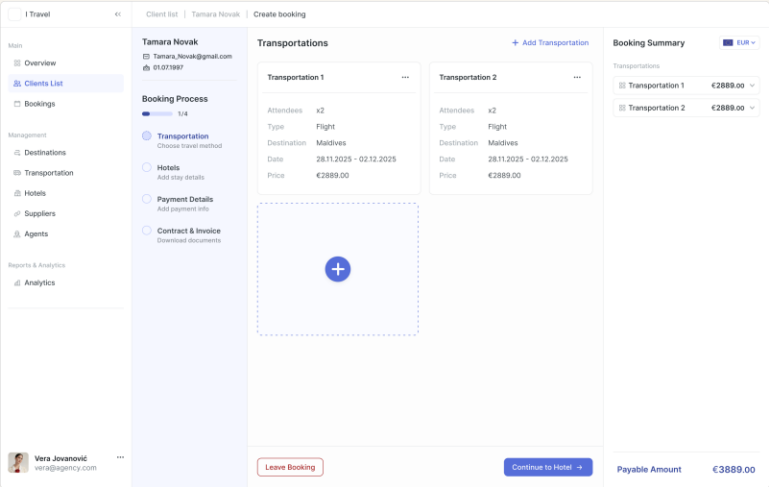
CUSTOMER PROFILE



CUSTOMER CONTEXT

Profile, travel history, and booking details in one place.

BOOKING FLOW



VISIBLE PROGRESS

Step-based flow with summary and pricing kept in view.

A focused set of connected capabilities shaped by recurring agency workflows

Each feature exists because it supports a recurring part of the agency workflow identified in the research.

01

Customer management

Search, customer profiles, contact details, and travel history.

02

Booking management

Structured booking process, status visibility, summary, and pricing.

03

Payments

Payment-related information and total payable amount within the booking context.

04

Reminders

Customer and payment follow-ups

05

Operational overview

A dashboard showing important activity in one place.

Usability sessions supported the core workflow and directly informed targeted refinements

The final usability evaluation involved two participants, so the findings are useful directional signals rather than broad evidence for the whole sector.

WHAT USERS VALUED

- Customer search aligned with their usual workflow.
- Customer profile kept relevant context in one place.
- Booking steps and visible progress were clear to follow.
- Booking summary and pricing supported review of the payable amount.
- Reminders were seen as useful for daily follow-up.

WHAT CHANGED

-  **Wording** Clarified interface language in response to participant feedback.
-  **Buttons** Adjusted action labels to better match what users expected to happen next.
-  **Information presentation** Adjusted how selected information was presented

TESTING SCOPE

2 participants · short prototype sessions · no live customer data · no production integrations

INTERPRETATION

Useful directional usability signals, not sector-wide validation.

CURRENT STATUS

A focused product story from research to tested prototype

The project translates travel-agency workflows into a CRM dashboard concept centered on customer context, booking progress, payments, reminders, and daily activity.

CASE STUDY SUMMARY

Research → product definition → design → usability feedback

PROJECT NOTE

This is a master's thesis project
Final academic conclusion
currently in progress
Product design and usability
evaluation completed

Research complete · product design complete ·
usability evaluation complete