

Bales Worldwide case study

“We’re selling more than just a holiday and we take that responsibility very seriously. We want it to be something that will be long remembered because it was so special. Our aim is to offer the highest possible service we can and we place a tremendous amount of investment in making sure our staff have the skills to be able to deliver this.” (Vivienne Thorn, HR Director)

Bales Worldwide is a family-owned, independent tour operator which prides itself on delivering the highest possible standards of customer care and personalised service to its clients. This is achieved through an extensive initial training programme for new staff and continuous, ongoing development for all staff.

People1st interviewed Vivienne Thorn, HR Director at Bales to find out more about their approach to training and development and the benefits this brings for the business.

Company background

Bales Worldwide began as an air brokerage in 1947, expanded into the leisure market in the 1960s when it began organising group tours and then introduced its tailor-made programme in the 1990s. As a family-run business, Bales Worldwide has over 60 years of knowledge and experience creating holidays of a lifetime.

The company vision states: *“We combine personal service and first hand knowledge with a passion for customer care to turn travel dreams into reality.”* The company aims are:

- To offer travel that is more than just a holiday
- To offer an experience that will be long remembered
- To offer a level of personal service that is second to none.

It is their emphasis on providing the highest possible levels of personalised service and attention to detail which sets them apart from their competitors and ensures the company continues to be successful 60 years on.

Consistently high service

“We want to have a consistent, high quality, well-branded relationship with our clients and to do that we have to make sure that everyone in-house is doing the same thing. To make that happen we need everyone to go through a thorough training program specific to their role.” (Vivienne, HR Director).

New sales employees are often surprised to find out that they will receive 6-8 weeks of one-to-one, dedicated training from Bales Worldwide in-house Training Co-ordinator, Susan Rock.

Susan has developed a training programme with a set structure which all new sales and operations staff complete. It starts with an introduction to the company, its written standards and familiarisation with the brochures. They then go on to learn about the reservation systems, Galileo and airline contracts and how to make quotes and take

bookings. By week six, they are usually able to take calls and do the job themselves, with supervision and support from Susan.

This intensive one-to-one training helps ensure that all staff are trained in exactly the same way and know the correct way of doing things. *“I think the consistency is the biggest benefit, everyone knows exactly what to do.”* (Vivienne, HR Director)

Previously, new starters were placed within their department and trained by their line manager with support from the team. They were shown how to do things by a number of different people which meant that we were unable to manage consistency of the training and the content.

The benefits of providing 6-8 weeks of intensive one-to-one training means that not only is there consistency but it also frees up managers and their teams time to concentrate on what they do best – making sales. *“It means that the training is more concentrated and consistent without distracting the manager of sales staff from their other priorities... previously it would take at least one sales person off their job to train up the other person”* (Susan, Training Co-ordinator).

There are also other benefits:

- It reduces mistakes as staff are trained the correct way to do things and where mistakes are made, these can be identified and rectified much earlier.
- It's a good indication of how well the person is performing and identifies their strengths and areas where more development is needed.
- It can help to retain the staff member as they feel more confident and are not thrown in at the deep end. Feedback shows they feel supported and well looked after.

“The immediate benefits are that they can straight away do their job and not need the same level of input from the team or manager, although they would always provide support and guidance when needed. I would say that by spending that initial amount of time with them it gets them up to speed much quicker and they will be making sales and taking bookings much quicker than they would normally.” (Susan, Training Co-ordinator).

Product training

“Product training never ends.” (Vivienne, HR Director).

At Bales Worldwide training doesn't stop after the initial 6-8 weeks – it is continuous and ongoing. A clear example of this is product training which must be absolutely up-to-date to ensure that sales staff can put together complicated tailor-made itineraries.

Bales provides a high level of overseas training trips, with the sales staff averaging at least two trips overseas each year. This ensures that they really have a far more in-depth knowledge of the destinations, are confident to talk about it and are able to provide recommendations based on their own experiences:

“Product knowledge is absolutely vital. For our sort of product where they are creating very complex itineraries e.g. they might be doing a trip all over India and going to 8 or 10 different locations, we need people who are able to say ‘it would be better if you travel on this train so that you get to see that temple at sunset’ it's that level of detail and making that level of recommendation”

Sales training

“To differentiate and offer this personal service, we’ve really got to help our sales staff be able to deliver this passion for travel and deliver this passion for personal service.” (Vivienne, HR Director)

With the technical and product knowledge, staff also need the tools to be able to sell the trip to the customer. Around three years ago, Bales Worldwide appointed an external training company to provide sales training to their sales team.

Three full day off-the-job training sessions are delivered to the sales team each year to help them improve the personal service they provide and develop advanced sales skills. The focus of each session changes according to the needs of the team at that time. Past sessions have covered:

- High performance sales habits (e.g. formula for success in sales, understanding the client, effective goal setting, phone skills)
- Word tracks (developing a script to be used as guide for sales conversations)
- Communicating (e.g. conviction in the product, verbals and non-verbals)

The training has proved very successful and the benefits can be seen in their conversion rates which have risen from around 20% four years ago to 29% last year. The conversion rate is the percentage of tailor-made quotes converted into actual sales.

Customer service levels have risen, evidenced by high levels of repeat business, customer testimonials and reduced complaints. Key to this success is understanding customer’s expectations at an early stage of their enquiry.

Each customer receives a Welcome Home telephone call which measures their satisfaction with Bales Worldwide before and during their holiday. Over 75% of customers say that their holiday exceeded their expectations.

Staff return from the sessions more motivated, with greater confidence and there is a clear return on investment through their improved sales conversion rates.

Key business benefits

To summarise, we asked Vivienne what she felt the key benefits for Bales Worldwide have been from investing in training and developing:

- **Higher levels of customer service** – training has helped their staff to become much more customer focused, providing a high level of personalised service to the customer.
- **Reduced customer complaints** – linked to the higher level of service provided, complaints at Bales Worldwide are less than 2%.
- **Increased sales** – sales conversion rates have increased from 20% to 29% as a direct result of providing sales skills training.
- **Consistency** – when all staff are trained in the same way, the service provided to customers is consistent.
- **Less errors** – well trained staff make less mistakes, for example ticketing ADMs (charges imposed by airlines for ticketing errors) have decreased.
- **Greater efficiency** – people are confident, have the tools and skills they need to do the job, they do it more accurately, are more efficient and are therefore more likely to get a higher workload done.

- **Staff retention** – staff that are well trained and know what they are doing are likely to have greater job satisfaction, which improves staff retention levels *“If you train your staff and they continue to see you investing in their development, they will be happier at work and be more committed to staying with the company.”*
- **Helps you to stay ahead of the competition** - *“It’s a competitive, tight market with so many challenges – if you haven’t got good staff who deliver why would your clients come to you?”*
- **Greater accuracy in costings** – training on how to cost a tour has resulted in greater accuracy which can be seen in the gross profit margins.

In short... *“As a final word, training and development of staff is the future of your company. If you want to get somewhere and move with the times you’ve got to invest in your people to make sure that they can do their part to take you there.”* (Vivienne, HR Director)

Further information

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