



CASE STUDY

Helping Intrepid Travel focus on a single customer view

PS+C

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Intrepid Group is the world's largest provider of adventure travel company. Their vision is to change the way people see the world. This includes providing the best customer experience.

The challenge, with six different brands and multiple databases, was to create a single customer view spanning marketing, sales, operations and service functions. As a first step, Intrepid initiated the Single Customer View project to bring bookings from their legacy booking system into Salesforce.

Business Challenge

Existing customer data existed in multiple systems for different brands, as well as spreadsheets. This leads to issues such as teams having no context as to whether a subscriber was a customer, subscriber or lead.

Only elementary integration existed between Salesforce and the two Starship systems to import booking data and to push Accounts to Starship. Starship data treated the booking as the single entity, therefore customers could appear multiple times across multiple bookings with no visibility of the customer from the single customer perspective.

Additionally there was no way to track what records had been merged between Salesforce and Starship, meaning records required cleansing and the ongoing method for keeping it unduplicated and cleansed required manual effort. Starship had no way of searching for customer data in Salesforce and account (Travel Agent, Suppliers, Operators etc.) information was not validated as it was in Starship leading to manual data entry errors



How PS+C helped

PS+C started by developing a custom booking API which provided greater detail by pulling Customer, Booking and Account information into Salesforce. Sales Cloud was used as the source of truth for Customer Information including marketing subscription management, case management, Indirect Sales (to travel agencies etc.) and Direct Sales (to customers, via Starship integration).

We installed and configured CRM Fusion Demand Tools and Dupeblocker to manage de-duplication of Customer data, and a custom Merge History table was built to track merges which included the Salesforce IDs as well as external IDs from the Booking system.

Validations and a customer Contact Completion Rating section were added to Customer and Agent records and a custom search was built to call Customer data via their booking system Starship. Account validation was added to enforce Account record hierarchy and classification



Building better

By delivering a more holistic customer view, we allowed Intrepid to:

- Market to customers smarter, by using booking and more accurate subscriber information
- Improve Case Management in Salesforce with Customer Relations Team now accessing the majority of customer interactions and booking data
- Direct and Indirect Sales now have access to far more accurate reporting with the intent to use this for target creation
- The customer data merge allowed for a true single customer view where all cases, bookings, notes etc. could be found on a single customer record and the merge history table, allowing administrators to troubleshoot merge issues from automation or manual merges
- The validations on Account and Contact greatly improved data quality and the custom search made visible to Starship greatly reduced the number of duplicate customer records being pushed to, reducing campaign costs and time of delivery.

This project has streamlined much of Intrepid Travel's back-office systems and has led to PS+C becoming a key partner of choice in future enhancements for Intrepid, which we are working with them to provide.



About PS+C Limited

We design and develop solutions that connect our clients with their customers, strengthen the security of their operations, streamline their processes and sharpen their competitive advantage.

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