



CASE STUDY

Helping Intrepid Travel gain a 360 degree view of their customers

PS+C

Let's build something better™
www.pscgroup.com.au

Intrepid Group is the world's largest provider of adventure travel activities. Their vision is to change the way people see the world and this requires providing an omni channel customer experience that is second to none.

To achieve this, Intrepid needed to create a single customer view by combining marketing, sales, operations and service data from six different brands and multiple data sources.

Business Challenge

Intrepid's existing customer data was spread across multiple brands, data sources (including spreadsheets) and databases, making it near impossible to have a complete customer view. Whilst some data was stored in Salesforce via integrations with legacy systems, there were no linkages from transaction views, and no data validation of account information.



How PS+C helped

PS+C Artisan's approach was to setup Sales Cloud as the source of truth for customer information, including subscription management, case management, indirect and direct sales. Customer, Booking and Account information was integrated into Salesforce with greater detail via a custom booking API.

Once the foundations were completed, we were then able to start work on the data merge and validation activities including:

- CRM Fusion Demand Tools/Dupeblocker was installed to manage de-duplication of Customer data
- 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
- 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

Intrepid's staff having a single, more detailed view of customer data detail allowed for:

- Marketing team to get better campaign results using more detailed booking and subscriber information
- Improved customer relations as all customer history available to manage cases in Salesforce
- Direct and Indirect Sales to have access to far more accurate reporting with the intent to use this for campaign creation
- Customer data merge allowed for an accurate single customer view where all cases, bookings, notes etc. could be found on a single customer record and the merge history table allowed 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 Salesforce

The system enhancements have resulted in all customer relations cases now being actioned within Salesforce, and all customer bookings now visible in Salesforce. Having one system as the source of truth has seen Intrepid's Salesforce logins increase by 350% due to high staff adoption.



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.

Level 11, 410 Collins Street
Melbourne Australia 3000

hello@pscgroup.com.au
+61 3 9682 2699
www.pscgroup.com.au



Let's build something better™
www.pscgroup.com.au