



Adventure Life's Easy CRM Transition

Importing Historic Emails for A New Salesforce User



CUSTOMER OVERVIEW

Protecting the world's wild places and fostering the positive benefits of tourism, Adventure Life is a leisure, travel and tourism business that helps plan individualized trips for adventure seeking travelers. Adventure Life schedules trips for more than 4,000 travelers to over 50 different countries on all seven continents annually. In order to help it do so, the company turned to Salesforce.

CUSTOMER COMPANY PROFILE

LOCATION:	Missoula, MT
EMPLOYEES:	50
INDUSTRY:	Travel and Hospitality
Solution(s):	B2C Commerce, Sales Cloud
GO LIVE DATE:	B2C Commerce – Sept. 2019

Challenge	Solution	Results
- Adventure Life communicates with over 4,000 travelers per year. With their business modeled around personalized travel planning, trip planners must be able to see the full history of communication between the company and the traveler. - When Adventure Life decided to upgrade CRM's to Salesforce Sales Cloud in 2019, it needed a way to ensure its legacy emails, stored in its past CRM, could be migrated to Salesforce - Other email integration solutions on the AppExchange lacked the ability to import legacy emails. - Importing legacy emails into Salesforce was a dealbreaker as to whether Adventure Life would choose Salesforce or go with a different CRM.	- Setting up an account with Match My Email enabled Adventure Life to import all legacy emails into its new CRM. - Emails can be brought in as either tasks or Match My Email's custom "email message" object. In Adventure Life's case, the company chose to bring in emails as custom objects. - The app places a limit on the number of emails it imports in a single day to make sure that API call limits are not exceeded. That limit is 1,800 email message a day per user - Match My Email automated the entire email importing process, saving users a tremendous amount of time to the satisfaction of Adventure Life.	Emails Successfully Imported - It took less than two weeks to process more than 250,000 emails that needed to be imported. - All legacy emails were captured in the related lead, contact and account records. Time Won Back - If it takes five seconds to log an email message manually into Salesforce, then Adventure Life saved over 350 hours! A Better CRM Implemented - The Adventure Life team found Salesforce to be the right CRM, but it was just missing legacy email importing. With Match My Email, this pain point was resolved.



Additional Detailed Information and Quantitative Results

Optional Commentary and Notes about Details of Deal or Implementation



Notes

- Match My Email offers complimentary support with subscription to the app. So, the extra help Adventure Life needed in configuring legacy email importing did not cost the company a dime.
- In addition to bringing in legacy emails, Match My Email has configured Adventure Life's org so that emails can match to its custom "Bookings" record.
- Lastly, Adventure Life and Match My Email are now collaborating on how to measure the company's sales reps average response time between emails. This report will make managing in a work from home environment all the easier!

Quantitative Results if Available

- More than **250,000+** legacy emails imported into Salesforce and automatically matched to related records.
- **350+ hours** saved from having to manually match legacy emails.
- Emails from more than **five years ago** were imported into Salesforce!
- Total job completed in less than **2 weeks!**



Solution Details



Additional Details

Competitors of Salesforce engaged in sales cycle:	SugarCRM and Zoho
Previous technology replaced by Salesforce:	GoldMine
Salesforce products deployed:	B2C Commerce, Sales Cloud
Customer Business Model (B2B, B2C, or Both)	B2C
Salesforce Product features:	N/A
If using Service Cloud, list use case (e.g. customer support, call center, field service, telesales, etc.)	N/A
Integrations:	Ring Central
AppExchange Apps/Partners	Match My Email, Ring Central



Sharing Guidelines

These questions are required for your story submission to be accepted. We will not contact the customer without reaching out to you first.



Sharing Use Case	
Can Salesforce AEs share this story and overview slide in sales settings?	Yes
Can Salesforce AEs mention the customer name in sales settings?	Yes
Is this customer willing to act as a reference customer for prospects?	Yes
Would the customer be willing to speak at Dreamforce or other events?	Yes

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