

Butterfield & Robinson

Company

Butterfield & Robinson

Industry

Travel/Tourism

Number of Employees

100

Corporate Headquarters

Toronto, ON

Website

www.butterfield.com



Toronto

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Calgary

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Vancouver

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Edmonton

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Overview

Butterfield & Robinson (B&R) has specialized in walking and biking tours since 1966. With a lineup of biking and walking journeys that now spans more than two dozen countries and six continents, each route is carefully designed to immerse travelers in the local culture and reveal a region's true spirit. B&R's goal is to create one-of-a-kind journeys for active people who value their freedom and want to see the world a little differently. B&R trips are for people who enjoy learning and experiencing as they travel – not by listening to lectures or gazing into glass cases, but through hands-on, cultural encounters.

Challenge

Butterfield & Robinson receive hundreds of inquiries and requests for travel brochures and itineraries each week. In order to generate real revenue for the company and leverage the momentum of these requests, travel advisors at B&R must provide immediate response to prospects to be able to convert them to customers.

To handle these inquiries, B&R relied on Travel Studio, their travel booking system for customer relationship management and marketing fulfillment. Travel Studio did not offer the complete functionality B&R required to track important customer requests and resulted in issues such as:

- Inability to access the right customer information at the right time
- Lack of visibility into customer activity history, which was required to track customer requests for brochures and itineraries
- Limited platform for future business growth

To overcome these challenges, B&R sought one system for Travel Advisors to access all customer data.

Solution

Ideaca Knowledge Services worked with B&R to implement the Sales module of Dynamics CRM globally. In addition, B&R also needed CRM to be able to integrate print and email requests that would address the distribution of company collateral and promotions. Based on Ideaca's recommendation, B&R implemented Microsoft Office SharePoint Server (MOSS) 2007 Beta with integration to Dynamics CRM. The solution used MOSS 2007 to store published materials, populating all trip related metadata from the Travel Management database (Travel Studio), using the Business Data Catalog (BDC) and exposing it in CRM using I-Frames. This allowed access to all customer information from one system.

By adopting this solution, B&R became the first company in North America to deploy Microsoft Dynamics CRM and MOSS 2007 utilizing the BDC for Line of Business integration. To capitalize on the success of this project, B&R plans to leverage this solution as the foundation for future integration.

Benefits

Implementing MOSS 2007 Beta integrated to Dynamics CRM resulted in numerous benefits for B&R's staff and customers:

- Timely response to customer requests, thus improving customer experience
- Ability to provide a tailored customer interaction for each specific client
- Capability of demonstrating an acute understanding of trends to support better decision making when creating future trips or modifying existing customer trips
- Real-Time query capabilities – something B&R had never been able to achieve
- Adoption of automated process steps via workflow
- Significant increase in employee productivity
- Access to the right information at the right time