

Gold Educational Tours Streamlines Data Management with Power Platform and CRM Integration



Gold Educational Tours is an educational tourism and homestay management company. The organisation specialises in cultural immersion programs that connect Japanese students with Australian students and host families, through real-life, immersive experiences. Across Western Australia, Gold Educational Tours partner with over 60 local schools and have a growing host family community.



Data challenges hindered future growth

Gold Educational Tours has always embraced the Japanese concept of Kaizen—continuous improvement. As their business operations expanded, they recognised the pressing need to enhance, automate, and streamline their processes. The challenge? Cumbersome, paper-based tasks were hindering their future growth.

Until recently, Gold Educational Tours managed Japanese students' data through a labour-intensive, paper-based process: every student would fill in a form, scan and email. Once received, this data needed to be downloaded and manually entered into the customer relationship management (CRM) solution.

Additionally, essential data on every host family based in Perth would be captured during a home visit. With employees manually inputting the data directly into the CRM during visits.

Considering the volume of students and host families represented by Gold Educational Tours, this approach consumed significant time and was also prone to data error.

Darren Hutchinson, Director of Operations and Home Stay, said, "We deal with thousands of students and families, so the management of that data was getting more difficult as we grew. We realised we needed a technical solution to automate and organise that data."

Already utilising Microsoft Dynamics 365 Sales App as their CRM solution, Gold Educational Tours sought to leverage Microsoft technology. Their transformation goal? To modernise their existing processes and build a solid foundation for future business efficiencies.

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On the road to improvement

Gold Educational Tours, dissatisfied with their previous partner, researched the local market for leading Microsoft partners, contacting iCatalyst to review and provide expert advice. After the initial meeting, iCatalyst were able to recommend a rapid, cost-effective solution to address the organisation's legacy data management challenges.

When evaluating potential partners, Gold Educational Tours prioritised consistency, responsiveness and expertise. They had encountered situations where initial consultations left a positive impression, only for subsequent interactions with the delivery team to disappoint due to a lack of knowledge.

However, their experience with iCatalyst was different. He explained, "We were promised a dedicated consultant, and that consistency, skill, and responsiveness gave us the confidence to partner with them."

With senior Microsoft Business Application team members assigned to the project, iCatalyst recommended Microsoft Power Platform to automate, consolidate and simplify the organisation's data overload. The result - a customised portal built on Power Pages that seamlessly integrated with the existing CRM, delivering a modern data management and document handling solution.

"I would have no problem recommending iCatalyst. They have delivered to a high technical standard and provide a very high touch customer service."



Results and impact

Since its launch, Gold Educational Tours has experienced significant efficiency gains, thanks to improved data management, real-time data transparency, streamlined document handling, and reduced data errors – all achieved with minimal manual intervention.

One particularly time-consuming aspect of their operations involved matching students with host families. The manual input of data and the need to export all the student and host families' profiles was incredibly time consuming. As part of the project, iCatalyst developed a Cloud Flow (using Power Automate) that automatically exports each profile both as a word and PDF document, seamlessly uploading to Microsoft SharePoint. This innovation has resulted in immeasurable time and cost savings for the business.

Hutchinson considered the benefits of deploying a digital platform for their data management,

"It's hard to quantify the hours, but in the past the company had one person dedicated to producing this documentation and now any member of the team can do that very quickly. It has been a huge efficiency."

iCatalyst also provided enhancements within Gold Educational Tours' CRM solution by integrating SharePoint to boost collaboration and document management.

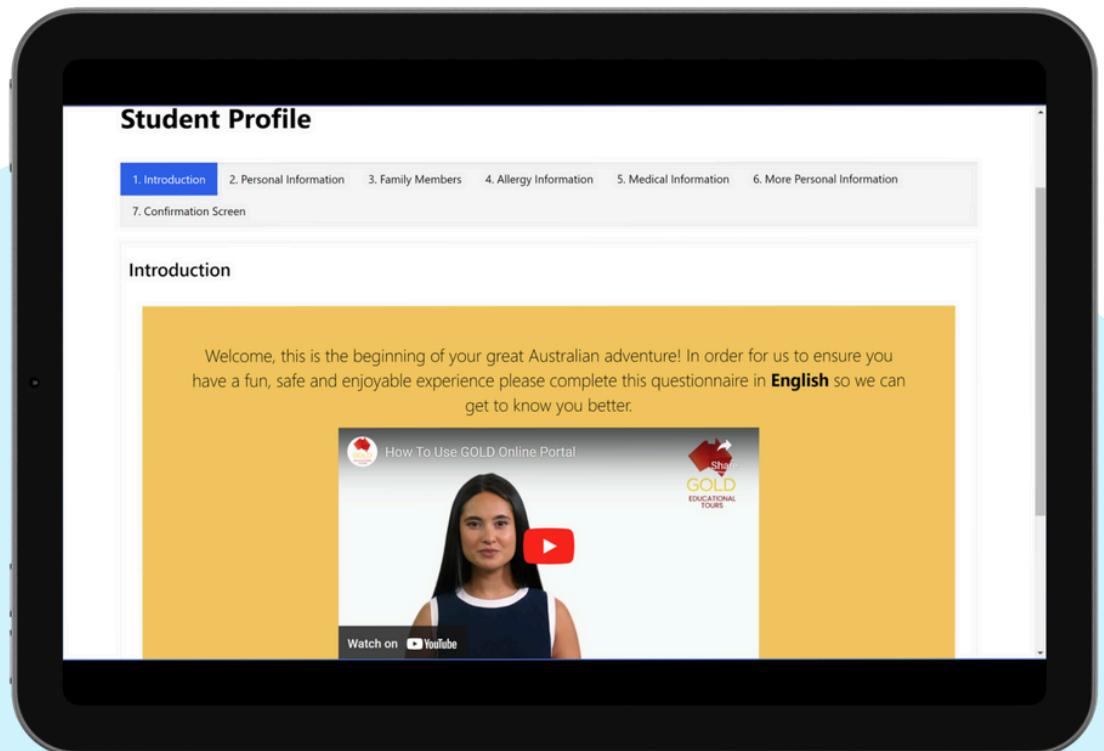
“The staff have been very receptive - it’s easy to use - and they love any improvements that make their life easier.”

Additionally, they redesigned the students’ application forms to improve their appearance and useability.

When discussing the staff’s response to the transformation, Hutchinson highlighted their appreciation for the time savings and improved data quality. Furthermore, the reduction of data handling has enabled the business to redeploy staff into more strategic and rewarding roles across the business, heightening job satisfaction. He said, “The staff have been very receptive - it’s easy to use - and they love any improvements that make their life easier.”

The portal has also been well-received by Gold Educational Tour’s clients, particularly the agents in Japan. The agents were previously responsible for manually handling student profiles and sending them to the company. The digital solution has significantly simplified their job and engagement.

Beyond data management, the launch of the portal has introduced additional opportunities and business efficiencies. Hutchinson mentioned, “It has enabled us to include some instructional videos within it. Not only are they entering their information, but they are being onboarded at the same time, which is extremely helpful.”



Screenshot of Gold Educational Tours new student enrolment portal, including instructional video to guide applicants on portal usage.



Having a local, experienced and dedicated partner mattered

When analysing the project delivery, Hutchinson was pleased to recommend iCatalyst as a Microsoft partner. He specifically highlights the responsiveness and commitment of Jeremy Desanker, General Manager of iCatalyst's Platform team, throughout the project delivery. He stated,

"I would have no problem recommending iCatalyst. They have delivered to a high technical standard and provide a very high touch customer service."

Gold Educational Tours currently maintains an on-going Support and Managed Services agreement with iCatalyst and are subsequently considering additional departmental operations that could benefit from technology-led efficiencies.

Leveraging their solid Microsoft foundation and the trusted partnership with iCatalyst, they plan to introduce new functionality and enhancements across the Power Pages Portal. Additionally, they aim to implement Microsoft Power BI for improved data insights and strategic decision-making: "We've got plenty to do."

In conclusion, Hutchinson rated the data and document management project with iCatalyst a success, ending the interview with,

"iCatalyst has an exception level of customer service, providing prompt and personalised assistance that has exceeded our expectations."



Solutions and services delivered

- Microsoft Power Platform (Power Pages, Power Automate)
- Integration with Microsoft Dynamics 365 Sales App
- Solution Architecture and Project Management Services
- On-going Support and Managed Services

Dynamics Done Differently

Founded by a team of highly skilled Microsoft Dynamics professionals, iCatalyst are an Australian-owned partner with an unwavering focus on Microsoft Business Applications. Our team leverages hundreds of years of ERP and CRM experience to transform businesses across a variety of sectors. We believe in true partnership, flexible engagement models, and a happy team driving positive outcomes for our valued customers.

Reputation is everything. Experience counts. Focus matters.