

Publishing Booklets with Last-minute Info from Salesforce: How a Travel Research Company Discovered a Smart Way to Create Event Programs



CLIENT	Phocuswright
INDUSTRY	Travel
SOLUTION	Forms and Print Services for Salesforce

Client Profile

Phocuswright, a wholly owned subsidiary of Northstar Travel Media, is the travel industry research authority on how travelers, suppliers, and intermediaries connect. In addition to industry leading research, Phocuswright hosts multiple events in the US and Europe to bring together travel industry leaders. Headquartered in the United States, Phocuswright has offices in India and local analysts on 5 continents.

Challenges

Phocuswright organizes events to bring together industry leaders, as well as discuss the latest educational content, innovations, and investment opportunities.

To direct people to the right seminars and sessions, Phocuswright provides event booklets and programs to the attendees. Information about events is stored in Phocuswright's Salesforce CRM system, for easy updates prior to events. However, printing the booklets and programs was a very hard and manual task.

First, data had to be extracted from Salesforce, then the content had to be formatted before the booklets could be sent to the printers. When preparing files for the printers, documents were created manually in Word. After the files were brought to the printers, the formatting would be distorted, and it was difficult to update the content with last-minute information, if needed. Additionally, the tools used by Phocuswright to format the booklets were expensive .

Solution

Early conversations with Phocuswright indicated that **Forms and Print Services for Salesforce** would be the best fit to provide results that Phocuswright wanted to accomplish. Forms and Print Services enabled Phocuswright to unify Salesforce data in the booklet, as well as make quick changes to the booklets when necessary, without the concern that the formatting would be lost.

Benefits Provided

- With custom formatting such as font type, coloring, line width and length, as well as page layout and design, Phocuswright is able to present event attendees with highly sophisticated programs.
- Event programs can be edited closer to the start of shows/ exhibitions allowing for more flexibility in event program creation.
- Phocuswright can now quickly create forms in PDF format, which means they will hold their layout and design when sent to the printer. This reduced the need for manual editing of event program books.

Solution - Key Points

- Standardization of templates substantially decreased the time required to create event programs.
- Customized templates can produce specific form features, such as coloring, formulas, line sizes and widths, add photos, depending on the user's requirements and information in the form.

Why Canon?

- **Forms and Print Services for Salesforce** allows users to quickly create highly visual material, ready to be printed, with up-to-date information from Salesforce.
- Canon Information & Imaging Solutions' Professional Services team has designed the sophisticated PDF forms according to Phocuswright's specific needs, upon a detailed consultation and analysis.



BEFORE	AFTER
Manual creation of program booklets	Booklets can be created with a few clicks
Long time to extract data from Salesforce	Automated extraction of data from Salesforce – Quickly!
Long lead time to prepare for print	Reduced time to create professional-looking, print-ready booklets
Last minute changes cannot be updated in the booklets	Up-to-date information, easy to make last-minute changes
Formatting gets lost , after the edited file is converted to PDF	Pre-designed template automatically pulls data into the pre-formatted PDF
Multiple, time-consuming fixes to repair the formatting	Booklets are correctly formatted and print-ready

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