

# A JOURNEY OF PROFOUND TRANSFORMATION

Digital transformation of Coach  
America's Salesforce



# Setting the Standard in Nationwide Charter Bus Services

Coach America is a full-service charter bus company, renowned for its wide-ranging fleet that includes passenger vans, motor coaches, and more, servicing clients across the United States. Founded by industry veterans Dylan Rosenthal and Salvatore Ciaravino, who collectively bring over 20 years of experience in transportation, Coach America has quickly become a leader in providing flexible and reliable transportation solutions.

With a steadfast commitment to safety, efficiency, and customer satisfaction, the company ensures that every journey is a luxurious experience. Whether it's a school trip, corporate event, or wedding, Coach America offers tailored solutions that meet the diverse needs of its clients, supported by a meticulously maintained fleet and highly professional drivers.





# Challenges in Managing a Growing Transportation Network

As Coach America expanded its operations nationwide, the complexity of managing a diverse fleet and coordinating with numerous vendors posed significant challenges. The company's existing systems were not equipped to handle the intricacies of booking multi-stop trips, managing vendor relationships, or integrating payment systems efficiently.

The manual processes involved in trip planning, vendor selection, and financial management led to inefficiencies and increased the potential for errors. To maintain its high standards of service and operational efficiency, Coach America needed a comprehensive digital solution that could automate these processes and provide real-time insights into all aspects of its operations.



# A Tailored Salesforce Solution for End-to-End Charter Management

To address these challenges, Coach America partnered with DTC Force to design and implement a customized Salesforce platform that could support every facet of their charter bus operations.

The solution involved the creation of a custom module within Salesforce Sales Cloud, allowing users to register clients, plan detailed trip itineraries, and automate key calculations such as distance and pricing using integrated Google Maps.

This centralized system provided Coach America with a unified view of all operational data, enabling more accurate reporting and better decision-making. By automating the booking process, the solution eliminated many of the manual tasks that had previously slowed down operations.

# Streamlining Vendor and Client Interactions

A critical component of the Salesforce solution was the development of dedicated portals for both vendors and clients through Salesforce Experience Cloud. The Vendor Portal allowed Coach America's partners to log in, view job requests, update their fleet information, and accept assignments with ease. This streamlined the vendor management process, ensuring that the right vehicles were matched to the right jobs efficiently.

On the client side, the Customer Portal provided a self-service platform where clients could manage their bookings, modify quotes, and view their trip history. These portals significantly improved communication, transparency, and overall efficiency in managing both vendors and clients.





# Seamless Integration with Financial Systems

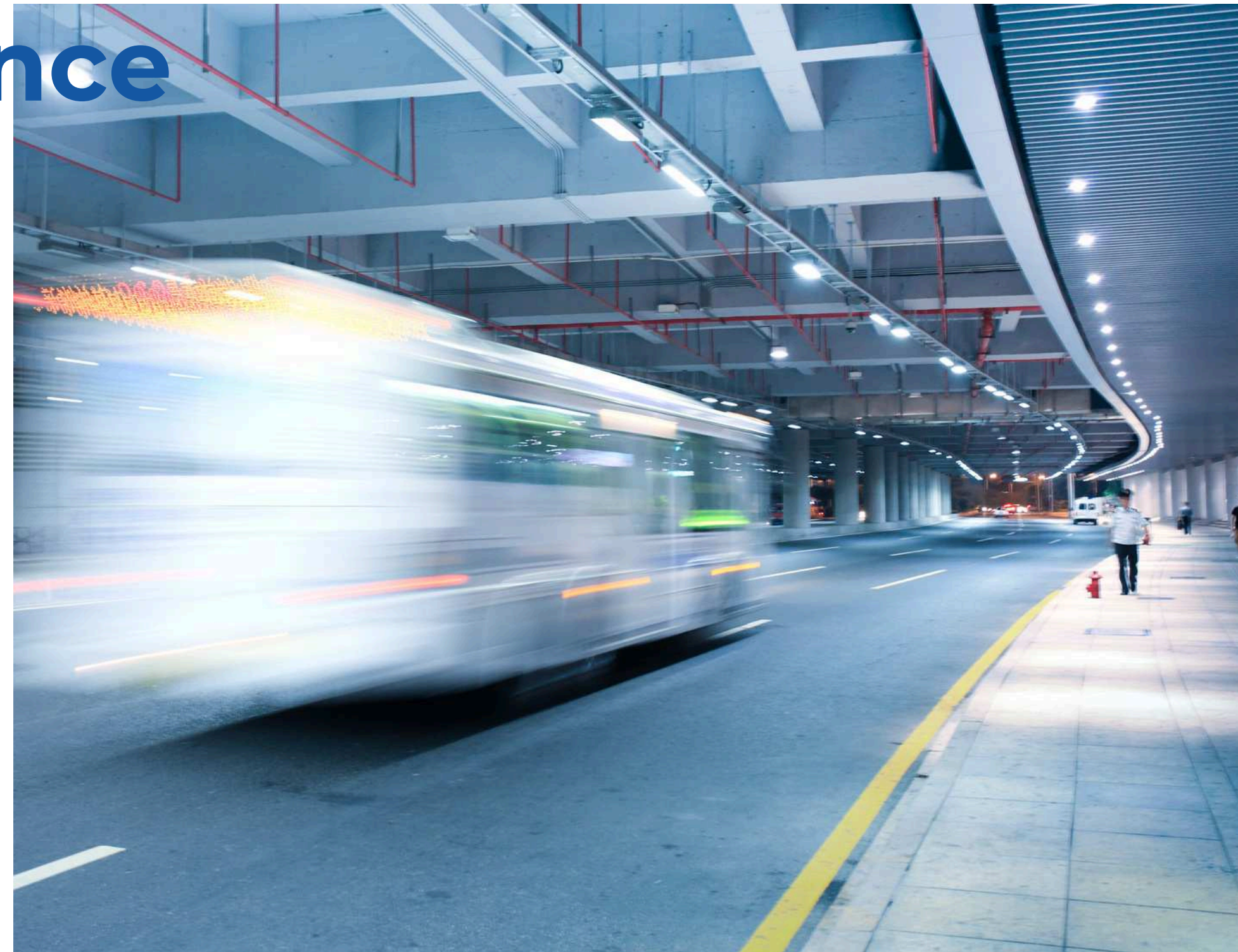
DTCForce integrated Salesforce with Coach America's QuickBooks system to further enhance operational efficiency. This integration ensured that all financial transactions, from payment capture to invoicing, were seamlessly synced between the two platforms.

And by leveraging connectors like Breadwinner or DBSync, the integration allowed for real-time financial data updates, reducing the need for manual data entry and minimizing errors. Additionally, implementing payment capture solutions within Salesforce enabled clients to make secure online payments, streamlining the payment process and improving cash flow management.

# Driving Towards Operational Excellence

The comprehensive digital transformation delivered by DTC Force equipped Coach America with the tools needed to sustain and scale its operations in a highly competitive industry. By automating complex booking processes, enhancing vendor and client management, and integrating financial systems, Coach America was able to increase efficiency, reduce operational costs, and continue delivering exceptional service to its clients.

This transformation not only addressed current operational challenges but also laid a strong foundation for future growth, ensuring that Coach America remains at the forefront of the charter bus service industry. The successful partnership with DTCForce underscores the importance of strategic digital investments in driving business success and maintaining industry leadership.



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