

# HOW ROAD SCHOLAR SCALED SMARTER WITH OPTIMIZEZY'S OPAL AI

Road Scholar is a nonprofit that designs educational travel programs for a global community of curious adult learners. Behind that mission is a complex operation: hundreds of programs, each requiring multi-channel content and rigorous policy review before it can go live.

## THE CHALLENGE

Road Scholar needed to increase output across both marketing and program operations without increasing team size.

On the marketing side, execution was slowing progress. Campaigns required significant coordination across teams. Content was often recreated instead of reused, and workflows lacked consistency, making it difficult to maintain speed and alignment. AI tools had been introduced, but without shared standards or a clear operating model, adoption remained uneven.

In program operations, the same friction appeared differently. Reviewing itineraries against six internal policy areas, including animal welfare, physical activity risk, and cultural heritage sensitivity, required eight to nine hours of manual effort per person, slowing approvals and limiting how quickly programs could move forward.

Both sides of the organization faced the same underlying problem: critical, repeatable work was consuming the hours that should have gone toward strategy and better experiences.



## THE PROCESS

Road Scholar partnered with Nansen to improve how work is planned and executed across teams.

The engagement began with alignment. Leadership defined a shared set of KPIs across experimentation velocity, content throughput, AI adoption, team satisfaction, and campaign performance, creating a consistent framework for prioritization and measurement.

From there, the focus shifted to how work was structured.

Content, campaigns, and tasks were reorganized within a unified taxonomy supported by cleaned and restructured metadata, making it easier to locate, reuse, and govern assets. Standardized workflows, supported by playbooks, templates, and prompt libraries, reduced variability and improved execution speed. Creative briefs were enhanced to automatically pull in meeting recaps, giving writers and designers immediate context without additional manual effort.

AI adoption was introduced through phased, practical use. Teams participated in weekly retrospectives, peer demos, and lightweight exercises, applying AI within active campaigns and refining workflows based on real feedback. Early pilots focused on "live" work, ensuring that improvements were grounded in day-to-day execution.

This approach created a repeatable system that could scale across teams and functions.

## THE SOLUTION

With that foundation in place, Nansen deployed Optimizely's Opal AI across Road Scholar's marketing organization.

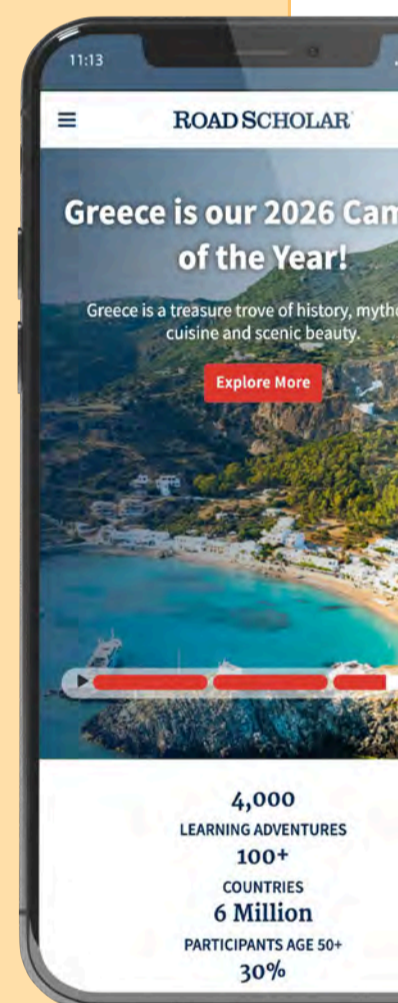
Opal was integrated into existing workflows rather than introduced as a separate layer. Marketing managers used it for meeting recaps, agenda development, presentation support, and task generation. Writers used it to condense itineraries, extract key highlights, generate SEO headlines, and validate URLs. Experimentation teams used it to accelerate hypothesis creation and testing.

Nansen supported adoption through workshops, peer coaching, and continuous feedback loops, helping teams move from initial skepticism to consistent, day-to-day use.

The same approach was extended into program operations.

The itinerary review process was redesigned into an automated workflow that processes programs in batches, evaluates them across all six policy areas, and generates structured, ready-to-use compliance reports.

AI became part of how work gets done across both marketing and operations, reducing manual effort while improving consistency and speed.



## THE RESULTS

These changes led to measurable improvements across efficiency, adoption, and focus.

### Execution became significantly faster:

- Catalog table-of-contents creation was **reduced from six hours to 30 minutes**
- Routine activities such as summarization, structured recaps, and content comparisons now **save two to four hours per task**, with those efficiencies tracked across teams

### Operational workflows were streamlined:

- Itinerary reviews that previously required **8 to 9 hours per person** can now be completed in **approximately seven minutes**, a **98.5% reduction in time**, enabling faster program approvals without compromising quality

### Adoption scaled with structure:

- Within six months, **60% of identified Opal use cases were in production**
- Standardized workflows and improved metadata supported consistency and governance

As manual effort decreased, teams were able to focus more on improving campaign quality, expanding experimentation, designing better travel experiences, and strengthening provider relationships.

As Mark Fagiano, Senior E-commerce Director at Road Scholar, shared:

**"This wasn't just a technical win — it was a strategic one. Partnering with Nansen allowed us to streamline operations, reduce friction, and give our teams the tools to move faster and work smarter."**

Road Scholar's approach was also recognized with an Opticon 2025 Award, reflecting the strength of its structured, phased adoption model.

## WHAT'S NEXT

Road Scholar continues to build on this foundation.

Next steps include connecting Opal with ODP to enable audience-led testing and real-time recommendations, introducing AI agents to automate workflows such as bulk email uploads and experiment tracking, and enhancing reporting through Slack-based visibility. The team is also refining instruction tuning to strengthen brand voice and output quality.

AI is now embedded in how work is executed across the organization and continues to evolve alongside it.