

A person wearing a light-colored hooded jacket, sunglasses, and a backpack is walking on a rocky trail. The image is overlaid with a dark teal tint.

ORVIS® × kaptio

KAPTIO CASE STUDY · EXPERIENTIAL TRAVEL

From Spreadsheets to Scalable Growth

How Orvis transformed its adventures division
with a single, end-to-end booking platform

ORVIS®

THE CUSTOMER

A US-based retailer specializing in fly fishing, wing shooting, and lifestyle apparel, with a dedicated adventures division delivering premium, multi-day guided experiences across global destinations.

Operating much like a mid-sized tour operator, Orvis manages complex itineraries, unique supplier agreements, and tailored customer requirements at scale.



BEFORE KAPTIO

The operational ceiling

01 Heavy reliance on spreadsheets and email for all booking operations

03 Disconnected systems for bookings, payments, and customer data

05 High administrative workload limiting team capacity

02 Manual quote creation causing slow turnaround times

04 All bookings handled over the phone during office hours only

06 Growth required more headcount, or a fundamentally better system

THE CENTRAL CHALLENGE

How do you maintain a
premium, personalized experience
while scaling efficiently?

THE SOLUTION

One platform, end-to-end

Kaptio centralized and automated Orvis's entire sales and booking workflow



Automated Quote Generation

Fast, consistent quotes replacing manual, time-intensive creation



24/7 Self-Service Booking

Customers review, confirm, and pay on their own schedule



Customer Data Collection

Automated capture of travel details and preferences



Unified Reporting & Insights

Full visibility into performance, trends, and business data



The transition has been **hugely transformational**. We've gone from almost all bookings happening over the phone to customers booking on their own time through the platform.

Andrew Pierce · Travel Experiences Manager, Orvis

MEASURABLE IMPACT

Results post-implementation

25%

Reduction in quote creation
time

30%

Increase in sales conversion
rates

20%

Reduction in administrative
workload

CORE CAPABILITIES

What drives the impact

01

Sales & Quoting

- Fast, automated quote creation
- Seamless deposit and payment collection
- Sales teams focused on selling, not admin

02

Customer Data

- Automated capture of travel preferences
- Reduced back-and-forth communication
- Centralized, consistent customer records

03

Reporting & Insights

- Identify trends and booking gaps
- Improved decision-making through data
- Full business performance visibility

THE OUTCOME

**No longer constrained by
systems.
Empowered by them.**

By moving away from spreadsheets and manual workflows, Orvis now works more efficiently, sells more effectively, and delivers a better customer experience — without adding headcount.