

Case Study

Building an Automated Guest CRM for Luxury Retreats



01 Project Overview



Project Overview

NewTree Ranch, a luxury retreat destination, needed a centralized way to manage its guest operations. With two ranches, multiple chefs, guides, and scheduled experiences, the client was struggling to track everything through endless email threads. We built a robust CRM in Monday.com, using Zapier, structured boards, and automations to streamline reservations, experiences, and internal communication into one system.

02 Problems

Problems

01

Guest emails were scattered across multiple inboxes.

02

Bookings, invoices, and communications were unstructured and siloed.

03

There was no central place to view a guest's itinerary.

04

Each retreat's unique schedule had to be manually put together.

03 Solutions

Reservations Board

01

The reservations board organizes all guest stays into clearly labeled sections. Color coded statuses provide instant visibility for each reservation. This eliminated the reliance on scattered emails for tracking bookings, giving the team a single view of all active and upcoming reservations.

The screenshot displays a 'Reservations Board' interface. At the top, there are navigation options: 'View All Reservations', 'Form to Add a Reserva...', 'Calendar', and 'Main table'. Below this is a search bar and filter controls. The main content is organized into sections based on arrival time: 'Arriving in 24 HRS', 'Arriving in 48 HRS', and 'Incoming'. Each section contains a table of reservations with columns for Reservation name, Dates of Stay, Villa Type, Stay Type, Booking Stages, Experience Invoice R..., Booking Confirm..., Booking Source, # of Adults, # of Children, Pets Informat..., and Email. The 'Incoming' section lists several reservations, including those for Joanne Lin, Sophie Buechert, George Lim, Michael Fine, Roland Sturm, Heather Dinger, David Chew, Beth Yudofsky, Amy Dalton, Sandra Doyle-Ahern, Sarah Puff, Thomas Vogt, Abigail Johnson, and Jane Doe. Each row is color-coded based on its booking stage, such as 'Received Booking Confirm...', 'Need to Confirm Itinerary...', 'In Conversation with Edwa...', and 'Contract Not Fully Paid Yet'. A summary row at the bottom of the 'Incoming' section shows a total of 89 adults and 17 children for the period of Aug 6, '25 - Aug 22, '26.

Reservation name	Dates of Stay	Villa Ty...	Stay Type	Booking Stages	Experience Invoice R...	Booking Confirm...	Booking Source	# of Adults	# of Children	Pets Informat...	Eme
Arriving in 24 HRS											
Arriving in 48 HRS											
Incoming											
Joanne Lin	Aug 6 - 8	The Barn Vi...	Stay / Vacation	Received Booking Confirm...		Send Email	Website Booking	2	0		orangetricycle
Sophie Buechert 1	Aug 22 - 26	Both Villas	Wedding	Book & Confirm the Guides	Invoice Drafted for ...	Send Email	Website Booking	12	2	1 Dog, Rosie	sophiebueche
George Lim 1	Aug 28 - 30	Both Villas	Wedding	Need to Confirm Itinerary ...		Send Email	Website Booking	12	6		georgehim@
Michael Fine	Sep 16 - 20	Both Villas	Stay / Vacation	In Conversation with Edwa...		Send Email		8	0		
Roland Sturm 2	Sep 23 - 28	The Barn Vi...	Stay / Vacation	Received Booking Confirm...		Send Email	Website Booking	4	0		l.semmer@kn
Heather Dinger	Oct 12 - 14	Both Villas	Complimentary			Send Email		4	0		heatherdinger
David Chew	Oct 15 - 21	Both Villas	Stay / Vacation	Received Booking Confirm...		Send Email	Kohmsa				davidLchew@
Beth Yudofsky	Oct 23 - 26	Both Villas	Wedding	Received Booking Confirm...		Send Email	Website Booking	10	6		beth.yudofsky
Amy Dalton	Nov 22 - 29	Both Villas	Stay / Vacation	Received Booking Confirm...		Send Email	Website Booking	12	1		agdalt0n98@
Sandra Doyle-Ahern	Dec 25, '25 - Jan 6, '26	Both Villas	Stay / Vacation	Received Booking Confirm...		Send Email	Website Booking	10	0		sdoyleahern@
Sarah Puff	Jun 2, '26 - Jun 5, '26	The Estate ...	Stay / Vacation	Received Booking Confirm...		Send Email	Website Booking	8			spuff76@ya
Thomas Vogt	Jun 25, '26 - Jul 2, '26	The Estate ...	Stay / Vacation	Received Booking Confirm...		Send Email	Website Booking	5	2		40nanner@
Abigail Johnson	Jul 11, '26 - Aug 22, '26	Both Villas	Stay / Vacation	Contract Not Fully Paid Yet		Send Email	Direct Booking ...				acjohnson86@
Jane Doe			Stay / Vacation			Send Email		2			jane@gm
+ Add reservation name								Aug 6, '25 - Aug 22, '26	89 sum	17 sum	
Past											

Form DB Board

The screenshot shows a software interface for a 'Form DB Board'. At the top, there are navigation tabs: 'Checklist + Quanti...', 'Calendar', 'Form', 'Experience Checklist', 'Main table' (selected), 'WorkForms Submissio...', 'Experience Checklist', and 'Table'. Below the tabs is a search bar and a 'New item' button. The main area displays a table titled 'Incoming responses' with the following data:

Item	Transportation Request	Describe your Transportation Request	Email	WIP Reservations	WIP Experiences	Draft Itinerary	Per Person R...
> Ginny Chamber's Experience 9			virginia0815@gmail.com	Ginny Chambers	Sound Journey Guided Yoga +3		0
> Jaewon Byun Experience 9			jaewon.byun@gmail.com	Jaewon Byun	-		
> Sophie Beuchert Experience 12			sophiebeuchert@gmail.com	Sophie Buechert	-		
George Lim Experience				George Lim	-		
> Mapping Zap 29	✓			-	Cheese Platter Arrival Dinner +23		0
+ Add item							
							0 docs

At the bottom left of the table area, there is a button '+ Add new group'.

02

The Form DB captures guest experience selections from forms and automatically assigns them to relevant reservations. Each chosen experience becomes a subitem under the guest's booking. This removed the need for manual input & matching, saving significant hours for Edward.

Experiences Board

The screenshot shows a software interface titled "Experiences Board". At the top, there are navigation options like "Discover AI", "Integrate", "Automate / 1", and "Invite / 1". Below this is a search and filter bar. The main content is a table with the following columns: Experience, Contact Pers..., Email of Guide, Mobile, Final Rate for Clients (In..., Guide Base Rate, 20% NTR Charge - Rates, 9.5% Tax Charge ..., Rate Remarks, and WIP Reservat... The table lists various activities such as "Transportation Request", "Early Check-In Request", "Cheese Platter", "Arrival Dinner", "Food Trays", "Seed-To-Table Fine-Dining Experi...", "Chef Mason: Wood-Fired Italian Din...", "Chef Michael: Wood-Fired Italian Di...", "Japanese Lunch", "Troubadour Sandwiches", "High Tea", "60 Minute Massage", "90 Minute Massage", "Wine Tasting Experience", "Guided Yoga", "Guided Yoga with Sound Journey", "Sound Journey", "Guided Meditation", "Baked Goods", "Guided Forest Bathing", "Breathe Work", "Spa Bath", "Flower Arranging", "Farm Experience", "Bee Rewilding", and "Additional Cleaning". Each row includes contact information for a guide, such as name, email, and mobile number.

Experience	Contact Pers...	Email of Guide	Mobile	Final Rate for Clients (In...	Guide Base Rate	20% NTR Charge - Rates	9.5% Tax Charge ...	Rate Remarks	WIP Reservat...
Transportation Request	-	-	-	-	-	-	-	-	-
Early Check-In Request	-	-	-	-	-	-	-	-	-
Cheese Platter	Cheese D...	lwintermeyer@ol...	-	-	-	-	-	-	-
Arrival Dinner	-	-	-	-	-	-	-	-	-
Food Trays	-	-	-	-	-	-	-	-	-
Seed-To-Table Fine-Dining Experi...	Jamil Peden	jamilpeden@yaho...	-	-	-	-	1,000	-	-
Chef Mason: Wood-Fired Italian Din...	Mason Meier	meier.mason22@...	+1 707 480 85	-	-	-	-	-	-
Chef Michael: Wood-Fired Italian Di...	Michael Degen	mbdegen@gmail...	+1 707 239 231	-	-	-	-	-	-
Japanese Lunch	-	-	-	-	-	-	-	-	-
Troubadour Sandwiches	-	-	-	-	-	-	-	-	-
High Tea	-	-	-	-	-	-	-	-	-
60 Minute Massage	Patricia Kenne...	patriciakennedy21...	+1 707 280 05	-	-	-	-	-	-
90 Minute Massage	Patricia Kenne...	patriciakennedy21...	+1 707 280 05	-	-	-	-	-	-
Wine Tasting Experience	Vanessa Maclu...	vanessa@platinu...	+1 707 478 24	-	-	-	-	-	-
Guided Yoga	Sierra Wagner	sierralaurel@gma...	+1 925 348 154	-	-	-	-	-	-
Guided Yoga with Sound Journey	Kelliann Regin...	yogawithkelliann...	+1 510 734 862	-	-	-	-	-	-
Sound Journey	Vinita Larocia	vinitayoga@gmail...	-	-	-	-	-	-	-
Guided Meditation	Birgit Woetzi	birgit.woetzi@gm...	+1 650 387 701	-	-	-	-	-	-
Baked Goods	-	-	-	-	-	-	-	-	-
Guided Forest Bathing	Denell Barbara	denell@cervicalw...	+1 707 486 721	-	-	-	-	-	-
Breathe Work	Chuck McGee ...	icedvikingbreath...	+1 707 616 388	-	-	-	-	-	-
Spa Bath	-	-	-	-	-	-	-	-	-
Flower Arranging	-	-	-	-	-	-	-	-	-
Farm Experience	-	-	-	-	-	-	-	-	-
Bee Rewilding	John Henshaw	johnrhenshaw@y...	+1 808 271 555	-	-	-	-	-	-
Additional Cleaning	-	-	-	-	-	-	-	-	-

03

This acts as the master database of all available activities. It dynamically links to the Form DB so that guest selections are automatically mapped according to the experience booked. This streamlined the itinerary process, replacing scattered notes with a single, structured system.

Contacts Board

04

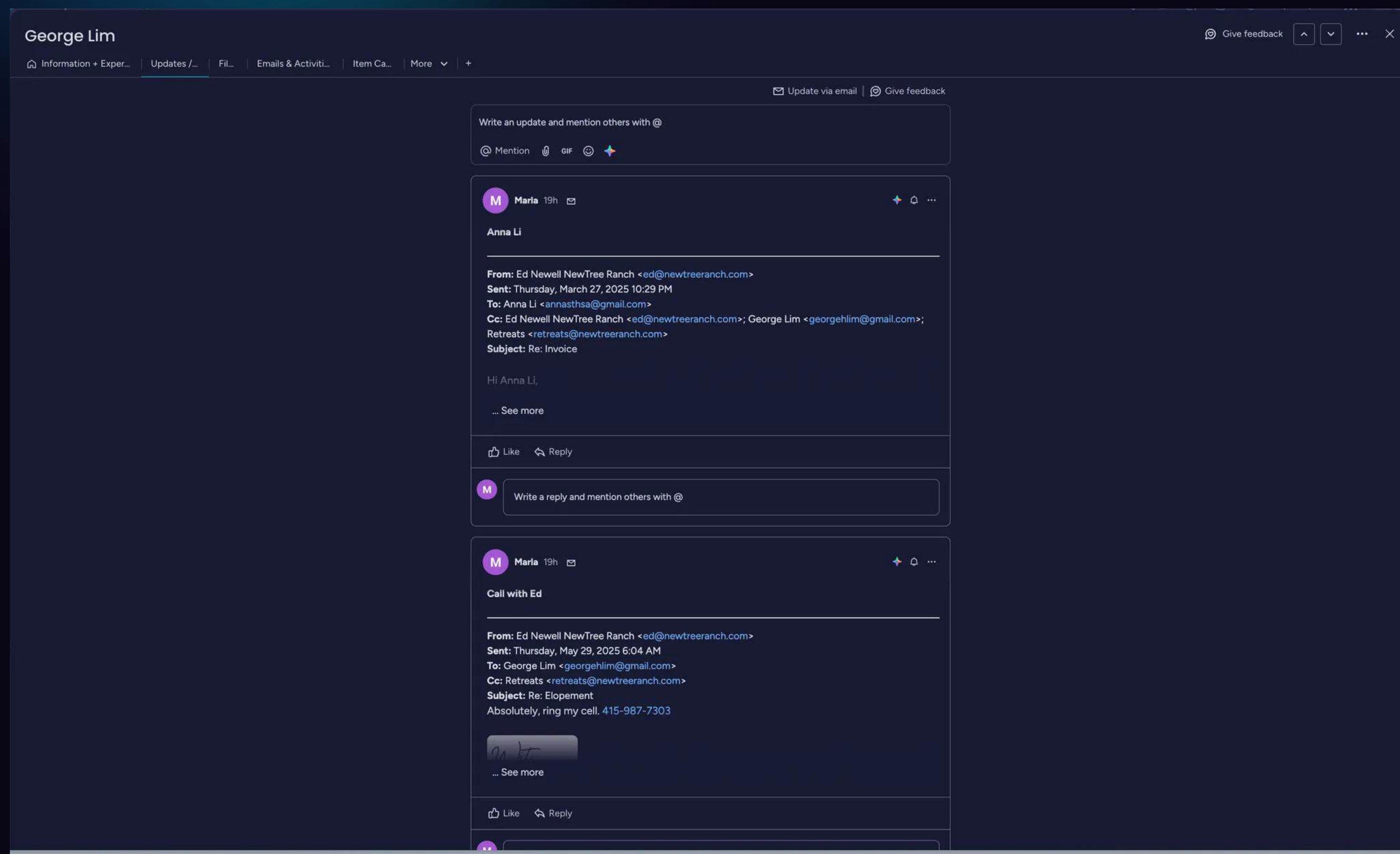
Each scene was sent to the Fal.ai API to automatically generate a professional video clip based on the provided instructions. This eliminated the need for manual filming, voiceovers, or video editing and helps save a lot of time for the business owner.

The screenshot shows a CRM interface with a 'Contacts Board'. At the top, there are navigation options: 'Discover AI', 'Integrate', 'Automate', and 'Invite / 1'. Below the navigation, there are search and filter options: 'New contact', 'Search', 'Person', 'Filter', and 'Group by'. The main content area is divided into two sections: 'Past Guests' and 'Guide / Supplier'. Each section contains a table with columns for Contact, Email, Contact Number, Category, Position, Company Name, Tasks, and Gift History. The 'Past Guests' table lists contacts like Jaewon Byun, Eliya Shirazi, Marla, and Ed. The 'Guide / Supplier' table lists contacts like Cheese Department - Oliver's Market, Damian Birdseye, D Lane, Jamil Peden, Mason Meier, Michael Degen, Patricia Kennedy, Kelliann Reginato, Sierra Wagner, Vanessa Maclure Platinum Vine Tours, Chuck McGee III, Denell Barbara, Vinita Laroia, Birgit Woetzl, and John Henshaw. A 'Partner' section is partially visible at the bottom.

Contact	Email	Contact Number	Category	Position	Company Name	Tasks	Gift History
Jaewon Byun	zain4abbas7@gmail.com	+92 317 5099577				-	
Eliya Shirazi	eliya@gmail.com	+92 317 5099578				-	
Marla	marla@gmail.com	+92 317 5099578				-	
Ed	ed@gmail.com	+92 317 5099578				-	

Contact	Email	Contact Number	Category	Position	Company Name	Tasks	Gift History
Cheese Department - Oliver's Market	lwintermeyer@oliversmarket.com				Oliver's Market	-	
Damian Birdseye	dbirdseye@oliversmarket.com				Oliver's Market	-	
D Lane	dlane@oliversmarket.com				Oliver's Market	-	
Jamil Peden	jamilpeden@yahoo.com					-	
Mason Meier	meier.mason22@gmail.com	+1 707 480 8578				-	
Michael Degen	mbdegen@gmail.com	+1 707 239 2310				-	
Patricia Kennedy	patriciakennedy2118@gmail.com	+1 707 280 0563				-	
Kelliann Reginato	yogawithkelliann@gmail.com	+1 510 734 8620				-	
Sierra Wagner	sierralaurel@gmail.com	+1 925 348 1540				-	
Vanessa Maclure Platinum Vine Tours	vanessa@platinumvinetours.com	+1 707 478 2494			Platinum Vine Tou...	-	
Chuck McGee III	icedvikingbreathworks@gmail.com	+1 707 616 3883				-	
Denell Barbara	denell@cervicalwellness.com	+1 707 486 7269				-	
Vinita Laroia	vinitayoga@gmail.com					-	
Birgit Woetzl	birgit.woetzl@gmail.com	+1 650 387 7084				-	
John Henshaw	johnrhenshaw@yahoo.com	+1 808 271 5551				-	

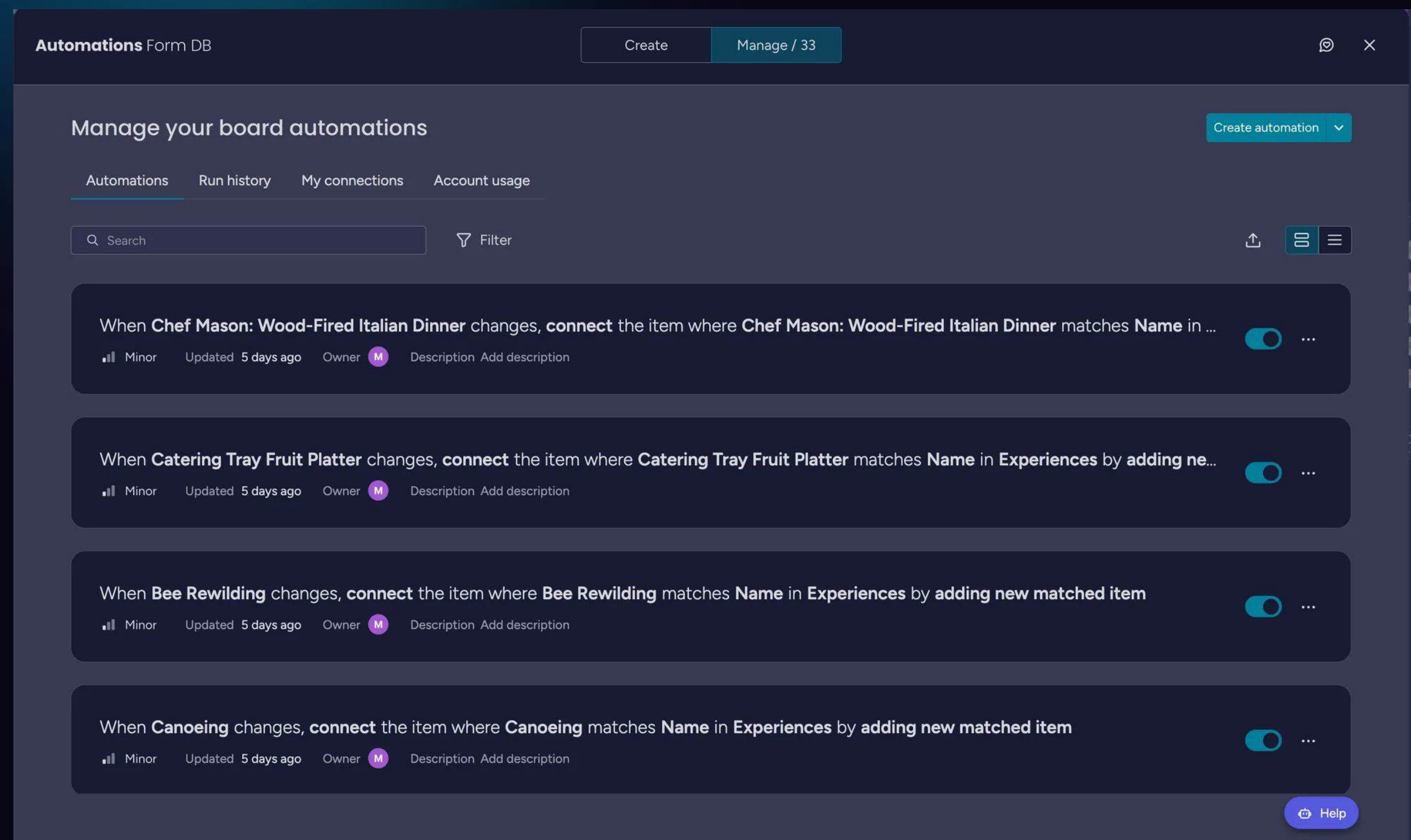
Email & Activity Integration



05

Emails guests, or staff are pulled directly into the relevant reservation as updates. This ensured that every conversation is stored alongside the booking, eliminating inbox hunting and giving the team complete insight into communications.

Advanced Automations



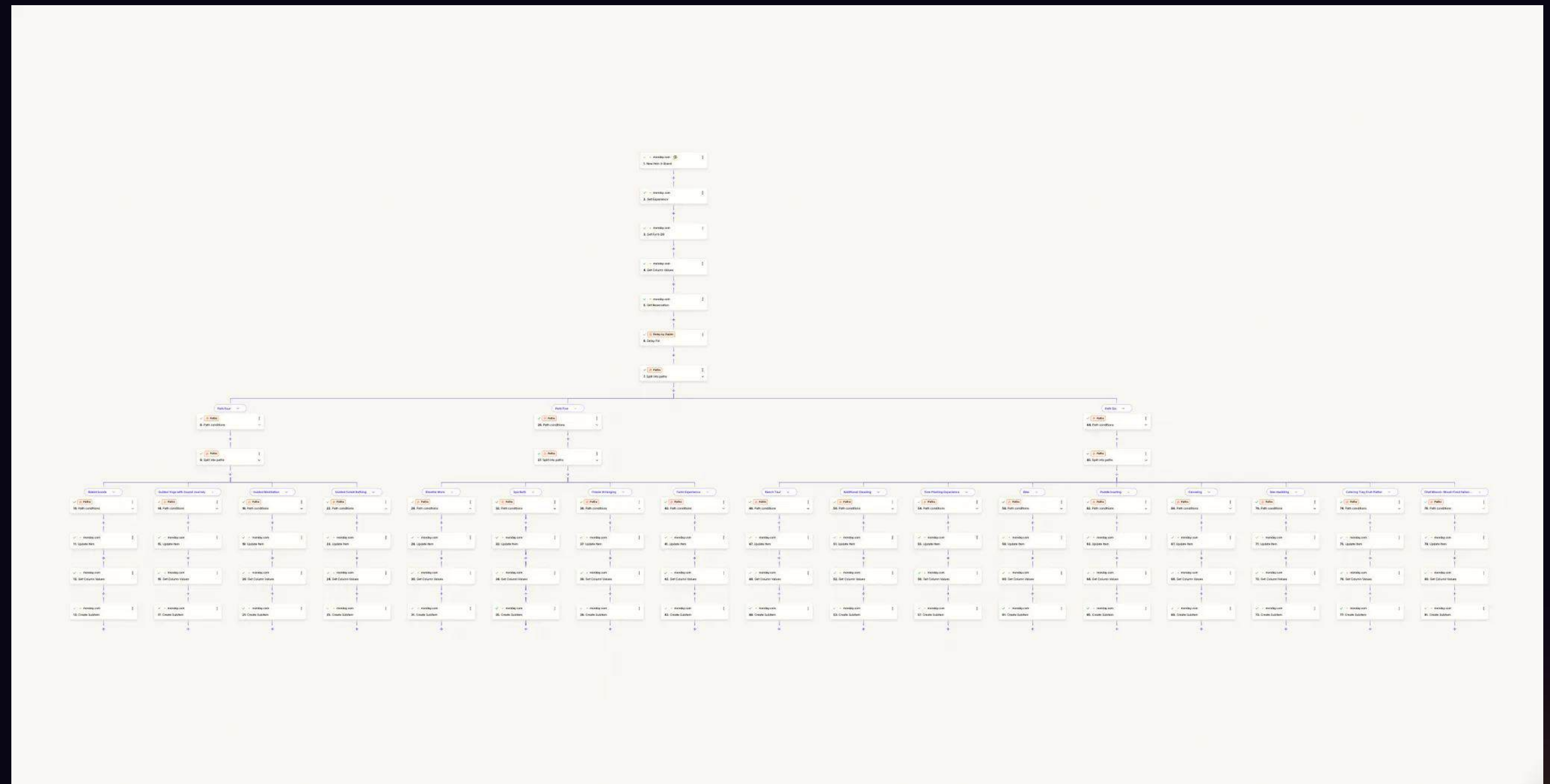
06

An FFmpeg-compatible concat.txt file was auto-generated with all video filenames in the correct format. This eliminated formatting mistakes and made merging seamless.

Automation Flow Design

07

Using zapier, conditional logic was built for assigning experiences. For example, if a guest chose “Guided Meditation,” the system checked availability, assigned the correct details & creates subitems for them in the reservation. This ensured the whole experience process is automated.



04 Conclusion



Conclusion

NewTree Ranch went from scattered email chaos to a fully automated CRM. The team now spends **90% less** time on emails, tracks every guest in one place, and generates itineraries automatically. With **33+ automations** running behind the scenes, Ed's team can focus on delivering seamless guest experiences instead of managing backend operations.

Thank You