

## Microsoft Dynamics™ CRM 4.0 Customer Case Study



**newcollege** 

**Train to  
Gain** 

### Supporting Train to Gain with Microsoft Dynamics™ CRM

**Education establishments have had to become increasingly commercial in their outlook to survive increasing competition. Diversification and identifying new markets are two ways in which many colleges are looking to meet the challenge.**

With their expertise and experience in delivering high-quality training and education, they are ideally placed to offer short courses to commercial organisations. But, this market is already heavily populated with training companies who have spent many years building up their customer-base and market knowledge.

To survive and prosper in such a competitive environment an education establishment needs to embrace new ideas and initiatives, such as the government sponsored Train to Gain scheme. This scheme brings great opportunities for training providers by using Skills Brokers to target businesses that have not engaged with training in the past. Settings like NEW College now have the chance to offer high quality, flexible training to a huge new market.

Powered by the Government through the Learning and Skills Council with an investment of £230 million in the first year (2006/07), Train to Gain will raise skills levels and the quality of training in businesses across England. This investment will rise to £399 million in subsequent years.

## Managing sales enquiries

North East Worcestershire College has built a reputation for excellent results and high-quality education and attracts learners from and a wide surrounding area. Already wanting to diversify, it was attracted to the Train to Gain scheme, but realised that its existing systems were not capable of handling the enquiries and prospect information that would be generated.

Mike Hill, Assistant Principal of Information Planning at NEW College, explains; *"We held our customer or a prospect information in a number of databases. This made it very difficult to search for information across these systems. It also meant that we could not track enquiries or ensure that they were quickly followed up. All things which would be taken for granted in a commercial training operation. So although the quality and scope of our courses was excellent, it was difficult for us to compete in a sales situation.*

*We knew that we would need to invest in a new system that would provide us with these capabilities, but at the same time could make full use of the data from our existing applications."*

## Clear process for CRM deployment

The College issued a detailed tender to 4 prospective partners and eventually chose **Gap Consulting** and Microsoft Dynamics™ CRM as their solution.

Commenting on their choice, Mike Hill said, *"Gap's was the clearest presentation we received. What impressed us about them was their experience in customising and implementing the solution. This meant that they were very definite on the processes they were going to follow during the implementation, how this was likely to impact us and the areas we would need to consider. This meant that right from the start we understood the full scope of what we were undertaking and what we would need to do to ensure a successful implementation."*

Andrew Gallery of **Gap Consulting** continued, *"We sat down with NEW College at the outset of the project so that we clearly understood their objectives. We were then able to devise a project plan that embraced these. A critical part of this was ensuring that their existing data was seamlessly integrated into the new CRM system."*

**Gap** is a consultancy group exclusively focused on Microsoft Dynamics™ CRM services and solutions. Their knowledge and experience embraces both the technical and business aspects of delivering the right CRM solution. With a deep understanding of implementing Microsoft Dynamics™ CRM applications, **Gap Consulting** were the ideal partners for NEW College.

## Integration with student data

All existing student and course information is held on the College's EBS system and this application would continue to be used after the implementation of Microsoft Dynamics™ CRM. **Gap Consulting** designed and installed an automatic link between the two systems that takes the information daily from EBS and integrates it with the CRM solution. This has been built using a standard Microsoft Dynamics™ CRM development platform and so is automatically future-proofed against upgrades.

## Improved customer information

With the key data in place, **Gap Consulting** were then able to customise Microsoft Dynamics™ CRM to ensure the screens were applicable to NEW College's business processes. As part of the project they also trained NEW College's trainer. This ensured that all the staff that would be using the system could be thoroughly trained using internal resources prior to launch. Gap Consulting believe it is also important this level of self-sufficiency can be delivered to a customer.

During the implementation **Gap Consulting** submitted a weekly update report to Mike Hill and his team so that they could see instantly when tasks had been completed or when problems were occurring that needed input.

The new system went live in May 2008 and already the College is beginning to see a return on its investment, Mike Hill said, *"Now we have all the information we need on customers and prospects instantly to hand and always up to date. Our staff can develop a history on an organisation showing contacts, details, employees sent for training, history of each organisation, actions and outcomes."*

*This allows us to plan marketing campaigns and target specific organisations for courses we have running. We can search through all our customers and prospects by a number of criteria including SIC code to help us understand the type of new courses that they may be interested in.*

*Importantly, we can also now see when a student has completed a course so we know when to target them for any follow-on training. All these tasks can be quickly assigned to a member of our team and given a time deadline to complete. This ensures that every enquiry is always followed up in a timely and professional fashion."*



## CRM in Education

There are huge technical and financial advantages for educational settings considering the deployment of Microsoft Dynamics™ CRM. Technology-wise, Microsoft Dynamics™ CRM represents an excellent fit with the Microsoft tools already used on a daily basis. End-users are happy to adopt this solution and feel comfortable with its intuitive interface, but it can also be tailored to very specific needs. Financially, Microsoft offer substantial discounts on Microsoft Dynamics™ CRM licences for customers in the education sector, currently around 75% off the retail licence price.

Emma Bannister, Marketing Manager at **Gap Consulting** concluded; *"We are delighted that we have had this opportunity to deploy Microsoft Dynamics™ CRM for NEW College. Whilst their business model is very different to our non-education customers, they wanted to achieve a commercially focused application. We enjoy a really positive relationship with NEW College and hope to do more work together in future. We recognise that they are leading edge in terms of using Microsoft Dynamics™ CRM to support Train to Gain, and are pleased that they are already seeing the benefits."*



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