

Project Overview

Our customer is a leading IT Solutions provider which is strategically aligned to Hewlett-Packard, Microsoft and Oracle. They invest heavily in technology and marketing initiatives to promote and drive the importance of technology in the workplace.

As a growing company it became apparent that they required a system to track their expanding customer base and to better target their customers and prospects.

They selected CRM system 'Adeo' to provide a single software solution with the aim of increasing efficiency, business revenue and customer satisfaction.

Best business practice and new procedures needed to be identified to ensure the system could deliver employee efficiency and business benefit.

The Solution

With a culture that was sales focused it was imperative to deliver a training solution which focused on the business processes and not simply the CRM function.

As a result of a previous project it was identified that staff would revert to old procedures if they were not comfortable using the new software, negating the investment the organisation made in IT.

With this in mind, training needed to be tailored to individual needs and responsibilities in regards to business function ensuring users were able to perform their specific tasks more effectively and efficiently.

A training solution, addressing individual job roles, focusing on business benefit, individual needs, and incorporating best business practices was developed.

Users attended a one day training programme, that was tiered by job role, focusing on specific aspects of the software incorporating shortcuts, common functions and do's and don'ts.

Training documentation was developed and it was decided that three Quick Reference Guides were required to capture the relevant job roles. Post implementation support was provided in the form of floorwalking and FAQs published on the client's Intranet site.

Snapshot:

Client

- IT Solutions Provider

Project

- Migration to CRM system, Adeo, to manage expanding customer base and better target prospects

Solution

- Individual training needs were accessed and a one day training programme was developed. The programme was tiered based on specific job roles and software applications

Project achievements:

- Innovative approach ensured successful roll out, gaining maximum benefits for the organisation
- Objective of adopting customer centric approach using a CRM tool, which could not only increase business revenue, but provide customer satisfaction, was met
- Client now has the ability to provide faster response to customer enquiries and can exploit cross selling opportunities due to the integrity of the data
- Senior management making better business decision in relation to strategic goals