

# S1 CUSTOMER SUCCESS STORY

## Vocational Education

### AT A GLANCE

#### Summary

The Bremer Institute of TAFE implemented Microsoft Dynamics Customer Relationship Manager to improve their customer service, marketing and sales operations. Using S1 Consulting and Software Services to assess their readiness and configure their requirements, The Bremer improved their business processes and customer interaction through their on time, on budget CRM deployment.

#### Campus Locations

Bundamba, Ipswich, Inala, Goodna, Springfield, Boonah South East Queensland

#### Products and Services

Vocational Education and Training

#### Effective Full Time Student Load

11,000

#### Employees

450

#### Web Site

[www.bremer.tafe.qld.gov.au](http://www.bremer.tafe.qld.gov.au)

#### Key Challenges

- Inconsistent, decentralised customer relationship with many touch-points
- No uniform sales approach to pipeline management and sales forecasting
- No closed loop sales process
- Sales information mostly “after the fact” or non-existent
- Creating a more integrated Marketing operation

#### Project Objectives

- Integrate CRM with existing Student Management System and Course database
- Replace manual, paper based marketing and sales process
- Quick and easy access to student information
- Improve the co-relation between marketing campaigns and enquirer-to-enrolment ratios
- Increase sales and student enrolments
- Improve response times and engagement with both students and corporate customers

#### Solutions & Services

- Microsoft Dynamics CRM 3.0
- Import Manager 2006 by CRM Extensions

#### Database

SQL Server 2005

#### Operating System

Microsoft Windows Server 2003

#### Why S1 Consulting & Software Services?

- Independent Education Industry experts
- Proven experience
- Excellent references
- Recommended by CRM software manufacturer
- Queensland GITC Endorsed Supplier

#### Implementation Highlights

- Rapid 6 month installation
- Strong buy-in from an enthusiastic, committed team who wanted tools to do their jobs better
- Project completed within budget and on time

#### Key Benefits

##### Quantitative Benefits

- Improved response times to customer enquires
- Increased enrolments
- Integration with existing systems

##### Qualitative Benefits

- Better reporting for informed decision making about curriculum development
- Improve data cleanliness, less duplication
- Reminders, responsiveness
- User take up of the system – staff enthusiasm

#### Existing Environment

- Disparate Excel spreadsheets and Access databases
- Paper based records
- Outlook for alerts and reminders
- ISAS Student Management System (hosted by Queensland TAFE)
- Digital Data Course Knowledge Base (DDS)

## 2006 Large Training Provider of the Year, The Bremer Institute's CRM Implementation was On Time, Within Budget and On Target with S1 Consulting and Software Services

# THE BREMER INSTITUTE OF TAFE

Serving the growing training needs of Brisbane's expanding population in the southwest corridor, The Bremer Institute of TAFE (The Bremer) needed a better way to engage with their students, the community and industry. Existing customer information was spread across the organisation and mostly contained in spread sheets, Access databases or on paper. There was no central repository, no consistent way of tracking customer enquiries and no way of co-relating enquiries to enrolments, marketing efforts or student demand for the courses on offer.

The Bremer provides important industry training to the region. The newly established Corporate Business Development Unit needed an integrated sales and marketing system to build its fee for service business.

The Bremer Customer Service Centre wanted to quickly and efficiently capture and track student enquiries and make it easier for students to obtain course information and enroll.

Institute stakeholders trying to win business for The Bremer were frustrated due to a lack of organisational knowledge about the relationship between the institute and its customers be they corporate clients, workplace trainers or single-subscriber students.

What The Bremer Institute needed was a well conceived CRM strategy; a user friendly, easy to customise and maintain, value for money Customer Relationship Management (CRM) system and a blueprint for implementation.

**“The S1 Readiness Report was invaluable. It documented internal resourcing requirements and identified areas where The Bremer needed to engage specialised expertise. It articulated the appropriate engagement model, presented a viable timetable and estimated costs.”**

Garth O’Mara, IT Services Manager  
The Bremer Institute of TAFE

## **Considering the Alternatives**

The Corporate Business Development Unit was already looking at possible solutions. Being a new business unit, their business processes were fluid and their requirements undocumented. On the other hand Customer Service was clear on their objectives with a good understanding of their business and what they wanted to achieve.

Project Leader and The Bremer Manager for IT, Garth O’Mara assembled a team of stakeholders and decision makers from Management, Customer Service, Business Development and IT to guide the project.

None of the challenges faced stemmed from any lack of enthusiasm, motivation or commitment from The Bremer staff. They formed a positive, focused team committed to successful outcomes. They wanted systems and processes to empower them to do their jobs better.

With a draft set of requirements, The Bremer knew they’d need to engage specialised, independent industry expertise to assess and articulate the how, when and where of their CRM implementation.

“We chose S1 because of their experience and expertise in Education.” says Garth O’Mara. “S1 had already successfully installed CRM at similar institutions. Their references were impeccable”.

Working with key stakeholders, S1 held a series of workshops to qualify The Bremer’s state of readiness. This included a review of the current status and key environmental considerations for a successful deployment. High-level user and non-functional requirements were presented and CRM hotspots identified. S1 presented a CRM Solution Map aligned to the Institute’s project

goals with clear, bounded recommendations about how to proceed, a viable timetable and estimated costs.

The Bremer had 6 main high level requirements across for their Customer Service and Corporate Business Development units. The categories included Opportunity Management and Sales Force Automation, Contact and Company Management, Activity Management, Marketing and Campaigning, Enquiry Management and the Knowledge Base.

S1 drilled down into the specific tasks and compiled a full list of requirements in order of priority by business unit. To aid in the decision making, S1 also compiled a list of non-functional requirements as a “sanity check” for software acquisition.

The S1 Readiness report identified CRM Hotspots; quick wins to engage and empower staff. It was thought that giving staff a level of autonomy with the new system would encourage them to use the system and embrace the resulting changes to their work practices. S1 was confident that the deployment of a well conceived and well implemented CRM strategy would result in a more consistent and systematic approach to customers, increase enrollments, provide better decision making information and give staff greater job satisfaction.

The rest of the Institute would ultimately need to access the system with requirements primarily in Contact and Company Management and Activity Management. The Faculties and some of the other business units also needed to view Contact and Companies to maintain updated relationship information.

To be successful, the project needed tight integration with the Queensland TAFE ISAS student management system and the Institute’s Course data base, DDS. A plug-in, called the CRMExtensions Import Manager was acquired and used to import ISAS and DDS data on demand or via an automated sched-

ule. The system would also be integrated with Microsoft Outlook via the MS Dynamics Outlook Client, Microsoft Exchange for email routing, activities, tasks, etc and the Desktop via MS Word mail merge.

As a government organisation, The Bremer has rigorous procedures to observe when choosing a new solution. Ultimately the decision came down in favour of Microsoft Dynamics CRM 3.0. "It's easy to customise, easy to use and maintain and interface to the existing Student Management System and Course database." explained The Bremer's CRM Implementation Specialist. "Being on government contract, it was also easy to buy and represented good value for money" adds Garth O'Mara.

System requirements were considered for both a hosted and local installation. The S1 Readiness Report was a comprehensive blueprint of what the Bremer required, how and when to implement and how much the new system would cost.

Importantly, S1 found that The Bremer's requirements were sufficiently clear and concise not to warrant a pilot deployment. S1 recommended a phased roll-out, tracking experiences so as to maximize the benefit of phase 1 experiences in the subsequent phases that would go onto embrace Contact Management, Correspondence Tracking and Distribution, Data Migration, Activity Management, Campaign Management and Enquiry Management.

### Powering Through the Project

Backed by the hearty endorsement from The Bremer executive and the CRM team, S1 set about crafting the precise configuration of the CRM system. Intended changes to system views, added attributes, modification to existing business flows, and new workflows as well as recommendations on any new human

business processes were identified along with other system specific aspects such as software deliverables and milestones, integration needs and the reporting model.

Of particular importance to the configuration was the consistent focus on the underlying business drivers:-

1. Close the customer enquiry and feedback loop.
2. Improve customer accountability and visibility at various levels throughout The Bremer.
3. Manage the multitude of Customer Touch-points, including electronic and more manual channels.

**"Three weeks after implementation, we knew the system would work. S1's value-add was their focus on our immediate requirements. They made sure we could walk before we ran."**

*Julie Poole, Customer Services Manager*

Another vital part of the project was the initial insights provided by the S1 software demonstrations. Examples of how the software could be configured as well as pre-configured processes in the system mapped to The Bremer's business were presented to The Bremer team. This helped users better understand

the process of configuration and change.

### Valuable Lessons Learnt

"We got a bit hung up on developing customer quotes. It's a complex function for the Corporate Business Development Unit. In hindsight, rather than attempt to address 100% of the requirement, it would have been more productive to achieve an 80% fit and focus our efforts on the change management aspects." warned Garth O'Mara. "Things seemed more complex than they necessarily turned out to be."

"One of our learning experiences is that it would have been advantageous for our in house developers to be trained concurrent with S1's system configuration" observed Garth O'Mara. "Similarly with our power users. Earlier training could have made a greater contribution in fine tuning the implementation.

It's something we recommended S1 consider for future implementations."

### Teamwork Leads to Success

The Bremer had 6 months to deploy their CRM strategy and reengineer its business processes ready for the next student recruitment cycle. Commencing in June, the S1 Readiness Report was completed by August, configuration commenced in November with user training early in December ready for a Go Live later that month.

### Looking to the Future

The combination of a robust system, usability and an enthusiastic team meant that come January 2007 enrolment, The Bremer handled a peak of 8,000 enquiries with next day dispatch of requested information. "We can now track leads to enrolments. We now have quality data upon which to make informed decisions regarding our curriculum." says Julie Poole, Customer Service Manager.

The new system is distributed to all faculties with 55 power users across the Institute. Facility Administration use the system to track their individual contacts. As was originally intended, the Customer Service Centre is now the main customer enquiry "go-to" point within the institute and the funnel through which all enquiries are processed.

"There is a growing trust between the Faculties and Customer Service now they're confident we're responding to all enquiries in a consistent and reliable way." observes Julie Poole.

The Bremer's next initiatives are outbound marketing programmes to generate more community and corporate interest in their course offerings. They also plan to follow-up clients

with surveys to improve course offerings, quality assurance and student satisfaction.

"The system is so flexible and open," says The Bremer CRM specialist "We're considering using it as a toolkit for a number of other requirements. The framework and technology makes it easy to integrate with our other systems."

### S1 Consulting & Software Services

S1 Consulting & Software Services Pty Ltd (S1) specialises in providing independent professional IT services to the Australian & New Zealand tertiary Education market. We are subject matter experts in our field and operate exclusively in the education market.

With more than 60 accumulated years of industry experience at over 25 Educational Institutions, S1 is a market leader in functional, operational and technical domain expertise. Our in-depth education industry experience and understanding of industry best practice is the cornerstone of S1's consulting practice. We concentrate our efforts on what we do best; business transformation in the education sector providing our customers with quantifiable, quality results.

S1 has a consistent pattern of customer success and a list of strong customer validated benefits that form the basis of our consulting methodology S1 **momentum**. For more information call your S1 Consulting & Software Services representative today on +61298873980, email us at [info@s1consulting.com.au](mailto:info@s1consulting.com.au) or visit us online at [www.s1consulting.com.au](http://www.s1consulting.com.au).