



Academy Holdings – CRM



CHALLENGE

Academy's existing CRM system:

- lacked functionality
- lacked integration capabilities

SOLUTION

MS CRM has the flexibility to meet Academy's needs:

- web-enabled
- integrates with SEO and other sales/marketing strategies
- transforms raw data into meaningful information

RESULTS

- reduced time spent on sales management
- better closing rates and associated revenues
- faster resolution of customer service issues
- increased productivity of sales and customer service staff

Introduction

Academy Holdings Pty Ltd (Academy) is a registered training organisation that delivers credited qualifications and executive development programs to the corporate and government sectors.

Academy comprises 28 employees, predominately based in Sydney, and has future plans to expand into Melbourne. The company's ultimate goal is to develop, motivate and maximise workforce productivity by providing engaging and enjoyable training complemented by flexible delivery and innovative materials.

Challenge

Academy's existing customer relationship management (CRM) solution had several limitations that restricted its ability to effectively and efficiently manage its customer relationships.

The existing system was not web-enabled, meaning employees could not access customer information remotely when required. It also failed to integrate with search engine optimisation strategies, so the business development team was missing important leads. The raw data supplied by the system could not be transformed into the meaningful information needed for Academy to make important business and marketing decisions.

Solution

After considering a range of CRM systems and IT consultancies, Academy selected Microsoft (MS) CRM because its built-in modules could be easily configured to suit Academy's unique needs, and chose PnP Solutions for its expertise in implementing and configuring MS CRM for more than 10 education providers over the previous two years.

Outcome

PnP Solutions implemented and configured Microsoft Dynamics CRM (MS CRM) for Academy Holdings over a three week period.

Academy's employees now have direct access to customer information through Microsoft Outlook or through a web interface such as Internet Explorer, which lets them access the information they need, when and where they need it – be it in the office or on the road.

MS CRM's flexibility and ability to configure automatic workflows allows Academy to capture important information about leads generated from

its SEO strategy. When someone fills out the contact information form on Academy's website, the data is sent to MS CRM and is transformed into a 'lead', which is automatically allocated to the business development manager (BDM).

PnP Solutions configured the sales pipeline so that once the BDM has been alerted to the lead, the CRM leads them through a process up to the point of closing the deal.

Michael Wolf, chief operating officer, Academy, said, "This configuration is incredibly beneficial as it has made dealing with large companies such as American Express, which requires hundreds of tasks and dozens of phone calls, much easier. Staff simply look at the activity page each morning and the CRM tells them what to do and when to do it."

These automatic processes track all information, keeping employees well-informed and leads successfully nurtured. MS CRM has also replaced repetitive manual tasks, significantly reducing administration costs.

MS CRM also allows Academy to take raw data and manage it meaningfully to make appropriate business decisions about what products to market and who to target. Academy can now see which qualifications are in higher demand than others and which geographical areas are suited to which qualifications by tracking lead and contact information, allowing it to tailor its marketing campaigns and target more suitable candidates.

Benefits

Academy is experiencing the following business benefits with MS CRM:

- increased productivity with more accessible customer information
- a higher number of business leads with stronger search engine optimisation integration ability
- streamlined business and marketing decision-making processes with more meaningful information available.

Wolf said, "MS CRM is a significant improvement on the previous solution. It has improved efficiency and provides valuable information to help Academy in its decision making."

Academy plans to further leverage MS CRM's capabilities by implementing new workflows, integrated document management and extra training.



PO Box 63
Artarmon, NSW 1570 Australia

Phone + 61 2 9467 9300
Fax + 61 2 9467 9301

www.pnp.com.au