



# Wodonga Tafe – CRM



## CHALLENGE

Wodonga TAFE's existing paper-based CRM system:

- did not provide centralised access to data
- was unable to compile meaningful information

## SOLUTION

MS CRM has the flexibility to meet Wodonga TAFE's needs:

- option for in-house deployment
- highly customisable
- provides 360-degree view of all student interactions

## RESULTS

- reduced time and costs spent on recording and accessing information
- increased efficiency and communication
- smoother decision-making processes
- more streamlined and targeted marketing activities

## Introduction

Wodonga TAFE comprises 100 employees and has been a provider of vocational education and training since 1986. It services a regional population of more than 100,000 and provides a range of students and business enterprises across Australia with onsite training and distance education programs. Wodonga TAFE aims to continually raise performance standards and strengthen its independence and reputation by developing student abilities.

## Challenge

Wodonga TAFE's existing paper-based customer relationship management (CRM) system was inefficient and inadequate in addressing its needs.

The institute was challenged by a lack of centralised access to information and experienced difficulty in recording and tracking communication with students. The system was also unable to compile meaningful information for decision-making and marketing activities.

## Solution

Wodonga TAFE decided to implement Microsoft (MS) CRM to overcome the limitations of its existing system.

Patrick Northcott, managing director, PnP Solutions, said, "Wodonga TAFE chose MS CRM because it provides the option for in-house deployment, is highly customisable to suit the company's needs and provides a 360-degree view of all student interactions."

Wodonga TAFE selected PnP Solutions and S1 Consulting to implement the solution so it could benefit from the experience of both companies. The combination of PnP Solutions' Dynamics CRM skills and S1 Consulting's business requirement skills provided a technically and strategically viable solution.

## Outcome

PnP Solutions and S1 Consulting rolled out MS CRM in a series of phases and workshops, on time and within budget.

The initial phases involved gaining an understanding of Wodonga TAFE's business requirements and how the solution would meet these needs. This was followed by the architectural design phase and finally the transfer from the old to new system. The workshops helped identify a variety of underlying business issues.

Martin Halmarick, director, S1 Consulting, said, "The workshops gave Wodonga TAFE a clear understanding of its roles, responsibilities and information process. Feedback and adjustments were made during each phase to ensure the software was meeting the business' needs, rather than the other way around."

MS CRM makes information available to any Wodonga TAFE employee from a central source, enhancing the visibility of information and communication across departments.

Geoff Young, team leader, learning innovation, Wodonga TAFE, said, "The centralised information system ensures no file ends up on the wrong desk. MS CRM is also accessible online, so teachers no longer have to take files home as they can log in remotely."

Wodonga TAFE needs to keep track of all communication teachers have with students to comply with statutory requirements. MS CRM gives teachers a quick and easy way of recording all interactions, and its configuration abilities prevent records being deleted or edited.

Wodonga TAFE has developed an Individual Learner Management Process to increase work-based and flexible modes of delivery to suit the needs of the learner and the employer. MS CRM enables tracking and recording of the students' learning pathways as well as information gathered from student interviews at the beginning, middle and end of courses. These interviews help identify the type of learning that suits each student so teachers can adapt their programs to meet everyone's needs.

Young said, "A teacher can open a student profile on any computer within the institute and have access to this information."

MS CRM logs all expressions of interest for courses in the system. For example, if one person wants information on a visual arts course, MS CRM automatically assigns this person as a 'contact' in the system and adds them to a wait list. By reviewing a wait list, Wodonga TAFE can monitor the level of demand for that particular course.

Each expression of interest is assigned an automatic workflow. For example, all expressions of interest during information nights are entered into MS CRM by Wodonga TAFE staff on the evening and the system automatically sends them an email thanking them for their expression of interest, with course information and enrolment forms attached. The email is already in their inbox before they get home.

## Benefits

MS CRM has given Wodonga TAFE the following benefits:

- reduced time and costs associated with recording and accessing information by shifting from a paper-based to an electronic CRM system
- increased efficiency and communication with centralised, more accessible information
- smoother decision-making processes with more meaningful information about course demand
- more streamlined and targeted marketing activities with automatic workflows for enquiries and expressions of interest.

Wodonga TAFE plans to roll out additional marketing activities with MS CRM and integrate it with other systems, including its student portal and student management system.



PO Box 63  
Artarmon, NSW 1570 Australia

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

[www.pnp.com.au](http://www.pnp.com.au)