

CRM training for British university

Unit4 Agresso CRM



Optimum, the IT training consultancy, has developed a full suite of training materials for the University of Salford following a major upgrade of its Agresso customer relationship management (CRM) system as part of a multimillion pound employer engagement programme.

The University called in Optimum to write and produce presentations, WebEx sessions, quick cards and a general reference guide to train around 100 users on the new features of the CRM system from system vendor Unit4.

Sandra Macpherson, CRM development manager at the University of Salford, said: "The new system looks different and has a number of new facilities so we wanted not just to update all the training documentation but to give it a much more professional look and feel."

"We didn't have the in-house resources or time to develop the materials ourselves but knew of Optimum and their experience with Agresso systems so they were the obvious choice."

Project Overview

- Upgrade to Agresso customer relationship management (CRM) system.
- Developed and delivered the new system features to around 100 users.

Methods Used

 **RapidScope®**
Planning & designing your training

 **Reference Guides**
Comprehensive end-user manuals

 **Trainer Packs**
Lesson plans for consistent delivery

 **Presentations**
Demonstrations to large groups

 **Online Solutions**
Various web-based learning options

 **Quick Cards**
Double-sided simple process cards

 **eLearning**
Interactive, passive & concept modules

 **Skill the Trainer**
Prepare internal team for delivery

 **Classroom Delivery**
Hands-on training sessions

 **Go-Live Support**
On-site floor walking & hypercare

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Sandra Macpherson CRM development manager

The Salford users are already familiar with CRM so, faced with a large audience and a very tight timescale, Optimum designed a presentation on the new functionality and basic processes for Macpherson to deliver on a group basis. This overview is supported by WebEx tutorials available on the University's intranet for users to follow in their own time to explore the system in more depth. These sessions will also be uploaded to Optimum's own learning portal.

Back-at-desk help is available in the form of quick cards on specific processes plus a general functionality guide to remind users of the system's main features outside individual roles.

Macpherson reflected: “Optimum faced some challenges, especially with the really compressed timeframe, but the four consultants had the specialist tools and skills necessary to deliver a very professional looking set of detailed and high quality training materials on time. That gives our users everything they need to navigate around the new system with confidence and help the university provide a better, more co-ordinated service to its customers and business partners.”



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