



Case Study

Educational Institution - CRM - Business Productivity & Customer Relationships

Business Challenge

Our client happens to be one of the leading technology service provider to public, private, charter and parochial schools in South California. It offers special courses to more than 9,000 students.

Potential participants can register for the courses through its website, in person, or with a call, and historically the centre relied heavily on separate business tools and applications to manage this process. The registering of participants for the courses was processed using Microsoft Excel 2003 spreadsheets and Microsoft Office Access 2002 databases. Enrolment data on the website was stored in a central Access database. These separate and non-integrated processes proved labor-intensive and time-consuming, affecting staff productivity. As a result of increasing enrolment, our client is looking for a system to

JIVA's Solution

The technology solution that we offered our client was to deploy Microsoft Dynamics CRM to automate its customer relationship management (CRM) processes. We were also involved in the deployment and customization of business processes for course administration, and the software needed to create course records.

Our client now uses Microsoft Dynamics to provide staff with direct access to course and participant information, to improve service quality, make timely decisions, and reinforce their reputation as a world-class educational establishment. After deploying Microsoft Dynamics, they have streamlined their workflow processes and improved productivity. The Centre now has a technology solution that adapts easily to dynamic business changes, with a minimal learning curve for employees.

Business Result

By integrating the customer leads to SUGAR CRM, the client is now able to track the leads and their progress much efficiently. As a part of marketing strategy, we have used the concept of Geomarketing.