

RDI Consultants Case Study

RDI has implemented Achiever CRM to manage its enquiry and enrolment processes

Coventry based training and development organisation RDI, implemented Achiever CRM in 2003 to manage its distance-learning course enquiry and enrolment process.

The Selection Process

In 2002, RDI decided to replace its existing enrolment and enquiry management systems with one solution that would provide new functionality and allow the system to be customised based on ongoing requirements and enhancements.

Achiever was recommended by an existing Achiever customer and was evaluated with several other leading CRM solutions as part of RDI's selection process.

Achiever was selected based on its seamless integration with Sage, its flexible workflow tool and the level of functionality offered.

The Project Phase One

RDI decided to implement Achiever using a phased approach to ensure user-acceptance was gained for each stage before progressing to the next. This allowed users to obtain knowledge and confidence in the new system in a controlled fashion. In addition, this approach enabled RDI to increase its participation in the implementation process of phase two and take greater ownership of the system.

Phase one of the Achiever implementation focused on streamlining the enquiry handling process. RDI used Achiever workflow to map its business processes, thereby ensuring the required information was captured at each stage and the enquiry was correctly progressed through to enrolment.

In addition, RDI incorporated Achiever's campaign management functionality to provide enquiry source analysis and identify successful marketing activities. Furthermore, utilising Achiever's marketing functionality also enabled RDI to commence targeting individuals that enquired but did not enrol.



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The Project Phase Two

Based on the successful execution of phase one, RDI embarked on the second phase of the Achiever project that focused on implementing the enrolment process.

Achiever was customised to manage student enrolment details including student and associated course information. Achiever workflow was incorporated into the solution to ensure the appropriate actions were undertaken prior to issuing payment requests.

On course commencement, RDI chose to utilise Achiever marketing functionality to distribute and monitor assessment questions to each student. Furthermore, tracking responses in the Achiever database allowed non-responders to be automatically flagged for prompt follow up.

Future Projects

RDI is planning to roll out Achiever to other departments, including Corporate Training to manage courses and events. Incorporating Achiever in other areas of the business will allow RDI to create a holistic solution encompassing information from previously autonomous departments.

In addition, future phases will include integration between Achiever and the accounts package to reduce unnecessary additional administration work.

How has Achiever been received?

RDI's IT Operations Manager, Barry Dawson, stated that, 'Achiever has been positively received within the business because of its intuitiveness, rich functionality and workflow. It allows us to manage our enquiry and enrolment processes seamlessly. He also adds, 'Since implementing Achiever, our customer service has definitely improved. We are able to offer customers a faster initial delivery of service and ensure all enquiries are followed up promptly. This, therefore, saves RDI time and money in administrative costs and allows our users to spend time on more profitable activities'.

www.achiever.co.uk

