Achieving Essential Quality Awards and Team Management of Crucial Data

Client : Kingsway Consulting Limited
Vertical Market : Education and training
Requirement : To have data in one place, available and usable. To meet quality standards set by education settings awarding body.
Solution: GoldMine Corporate Edition

Benefits to Kingsway Consulting of GoldMine delivered by Caltech :

- Transformed the way the business development team manages client information
- Reporting ensured that Kingsway Consulting could deliver great customer excellence
- Effective reporting attracted funding i.e. Train to Gain
- A single, common system that consolidates information and IT systems
- Management have real-time visibility of what is happening in the organisation
- Improved accountability and response times of quoting and client record information

"I don't feel like I could do my job properly without GoldMine". Cat Symington, Business Development Co-ordinator

Background

Kingsway Consulting Limited, a wholly owned subsidiary of North Lindsey College, provides training and support services to businesses locally, regionally and nationally. It enjoys a high profile reputation for the quality of engagement and outputs.

North Lindsey College are the largest provider of post-16 education and training in North Lincolnshire, offering a huge range of full-time, part-time and work based learning courses at a range of levels.

Organisational Challenges

Kingsway Consulting were using several excel spreadsheets and databases and found that managing business development through these functions were simply unmanageable.

There were lots of people working independently and not as a team, with several databases and sources of information being used throughout the organisation.

Proposed Solution

During 2004 Kingsway Consulting reviewed its options of a system to keep all data in one place, have one central calendar and take away some of the pain of sending out mass mailings via letter or emails.

They contacted Caltech, one of the UK's leading providers of CRM systems.

Caltech proposed GoldMine as the solution that would meet their needs as it is available in several packages, and can be tailored to suit the needs of many industries.

Kingsway Consulting also added on QuoteWerks which is a powerful quoting software solution, giving extra capability to GoldMine. QuoteWerks creates quotes so quickly and accurately that they can be prepared and sent to clients with speed and accuracy. Once a quote has been created, QuoteWerks sends this to Kingsway Consulting clients in pdf format. This has saved Kingsway Consulting time and effort.

User Acceptance

GoldMine was a natural choice and the users quickly saw the benefits of the system. The uptake of using the system was exceptional, and everyone is committed to using GoldMine. "It's our life blood." says Cat Symington from the Business Development Team

"All information is in one place – it's the first thing we do in the morning. Load up GoldMine." Cat Symington, Kingsway Consulting

Over 5 years Kingsway Consulting have reaped the benefits of the system.

"GoldMine was the driving force in helping us to achieve TQS and Customer First accreditation." states Katie Ricketts, Business Support Team Manager.

Ricketts continued, "GoldMine has also helped us in gaining certain areas within Part A TQS. All the archive and history is captured in one place and it's very powerful not just for these accreditations but also for users capturing and using information."

"Evidence for TQS accreditation would not be available without GoldMine, and there would be so much duplication, with data in so many places." Katie Ricketts Kingsway Consulting

Ricketts confirmed, "GoldMine is an essential part of our client engagement process. All appointments are linked in GoldMine to each client record, and the write up from each appointment is easily available. This gives Kingsway the ability to track key accounts and also track who is corresponding with clients. Having useful relevant information is powerful for our Account Managers to get to know each client and drive relationships without any control compromised."

Ricketts continues,

"GoldMine is what makes us different from other training providers; we don't prepare standard letters – we send meaningful communication relevant to each client.

Once changes are made in GoldMine it only needs to be done once, and done properly. This could be something so simple like amending an address or surname, but again this saves wasted time and effort."

"GoldMine is reliable – our central nervous system. The information I need is there, fast." Cat Symington, Kingsway Consulting

What's next?

Kingsway Consulting have been successfully using GoldMine for 5 years.

The next steps Kingsway are considering are to offer remote users (Assessors) a better usage level of GoldMine whilst away from the office. iGoldMine could be an option as it is a web-based system that runs very quickly and can be accessed from any machine without compromising security.

Kingsway Consulting are also considering record curtaining giving access of GoldMine to other teams.

Terminology :
Record Curtaining: ability to display only part of a record if data security may be an issue. This is also used to give access to teams that may only need part of a record or for internally sensitive information.

About Caltech

Established in 1999, Caltech has become one of the UK's leading suppliers and implementers of Customer Relationship Management software (CRM). Based near Leeds, it works with clients to manage their customer contact strategies, operational processes and daily business functions in order to maintain audience loyalty, increase awareness and ultimately drive sales. This is achieved by recommending, implementing, developing and integrating a variety of cutting edge database technologies that are most suited to the brief in hand, including; Microsoft Dynamics CRM, GoldMine, HEAT and ACT! By Sage.

Caltech is able to tailor every system to the specific needs of its clients whether it is an SME or large blue chip organisation and regardless of their IT capability. Long term and successful integration is when CRM works best so Caltech, unlike many of its competitors, is not just a supplier – the team works on an ongoing basis with every client to develop specific systems so they work hand in hand with existing software, from accountants systems to telephony packages, which can be adapted to meet ever changing needs.

Current Caltech clients include; Simply Biz, TNT, the NHS Information Centre and Hays Travel. Customer service is at the very heart of everything Caltech does – it sees clients as partners and is committed to meeting and exceeding expectations in the most effective way possible, leaving a real sense of confidence.

To find out more contact
Catherine@caltech.co.uk or jonathan@caltech.co.uk.
Telephone : 01924 507 280
www.caltech.co.uk