

Training for a UK health and education qualification regulator

Microsoft Dynamics CRM



Optimum, the IT training consultancy, has designed and delivered eLearning materials and courses to train more than 1700 clients and staff of Cache, the specialist care qualifications body, to support the launch of its new integrated web customer interface.

The training was developed for two specific audiences. Optimum created online tutoring materials for staff at the 1200 training centres around the UK that offer Cache qualifications and who can now log on to the 'cachezone' to access customised web portals to manage their learner awarding services. The learning materials were designed both as online help facilities and downloadable versions for paper-based support.

Optimum designed the second element as a mix of eLearning, backed up by half- or one-day workshop style courses. These were created to train Cache's 120 staff initially on how to use and support the new integrated customer interface, which is based on Microsoft's Dynamics CRM system, and then to develop best practice. Quick cards were also produced for easy to access back-at-desk help.

Project Scope

- Implementation of Microsoft Dynamics CRM system.
- Phase one included online tutoring materials for staff at the 1200 training centres around the UK.
- Phase two encompassed a mix of eLearning, backed up by half-day or one-day workshop style courses, coupled with quick cards to offer back-at-desk refreshers.

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 modules
& passive videos



Skill the Trainer
Prepare internal
team for delivery



Classroom Delivery
Hands-on training
sessions



Go-Live Support
Onsite floor-walking
and hypercare

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Esther McLaughlin Deputy chief executive

Esther McLaughlin, Cache’s deputy chief executive, said: “Optimum’s training was first class. The feedback from staff and customers has been extremely positive. The proof is that our customers are actively using ‘cachezone’ well and our staff have the confidence to deal with the new system.” She continued: “Meeting the go live date was non negotiable and Optimum’s consultants delivered against a very challenging timetable. They also had to be flexible in their approach because they were working alongside multiple external suppliers and our IT project team who were still testing the final elements of the system.”

Post go live Cache wanted to reinforce the eLearning and classroom training for its staff with additional materials which could be used for new staff at induction, for ongoing refresher training and to support any potential performance management issues. Optimum has created a series of tutoring materials in a range of formats and has also trained Cache how to use the eLearning software to set up and develop its own library of materials.

A major part of the IT project has been significant change management, and the introduction of new work processes, such as using task queues rather than email to progress actions, giving greater visibility to how Cache deals with its customers. Optimum has documented all these new business processes and produced a full reference guide to ensure continuity and best practice.

McLaughlin reflected: “As a qualifications awarding body, it is paramount that we get things absolutely right first time and the quality of Optimum’s meticulous planning and delivery throughout the project was key for us. Quite simply, they made a very significant contribution which made our go live such a success for our customers and our staff.”



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