

AUTOMATING BUSINESS PROCESSES

**TaskCentre**®

**Home Learning College cite TaskCentre as the perfect complimentary solution for SalesLogix**



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**Cathy Diver, Head of IT for Home Learning College.**

SalesLogix

**TaskCentre**®

The Leading Business Process Management (BPM) Solution

### Business Requirements

- ⇒ To automate repetitive manual administration tasks carried out by SalesLogix users
- ⇒ To automate the creation and distribution of management reports by exception or on a scheduled basis
- ⇒ To automate data exchanges via FTP, with Home Learning College’s debt collection agency.

### Solution Deployment

- ⇒ Automate the extraction, formatting and distribution of business critical information to and from SalesLogix
- ⇒ Automate the extraction, formatting and distribution of business critical information to and from Sage Line 500

### Business Benefits Delivered

- ⇒ The automation of repetitive administrative processes
- ⇒ Significant increases in employee productivity
- ⇒ Dynamic delivery of management information by exception and scheduled events
- ⇒ Decrease in debtor payment cycles
- ⇒ Improved trading partner connectivity
- ⇒ Integration of SalesLogix and Sage Line 500 data

#### ► Company

Home Learning College

#### ► Industry

Book Publisher

#### ► Geographies

United Kingdom

## Case Study: Home Learning College

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# TaskCentre

Orbis Software (UK)

Home Learning College has been established for over 18 years, and is now the leading provider of high quality home learning courses.

Over 2000 new students of various ages and backgrounds enrol with Home Learning College every month. These people are united in a common goal to enjoy the benefits, both personal and financial, provided through learning new skills and improving their knowledge.

Home Learning College employs 150 members of staff and achieved an annual turnover of £23m in 2006.

### **Home Learning College and its initial interest in TaskCentre**

Home Learning College has an enviable reputation for providing market-leading distance learning products and services. To achieve this, it has invested heavily in the leading CRM solution, SalesLogix.

Without question, this investment has brought greater structure and visibility of information, but Cathy Diver, Head of IT for Home Learning College saw this as just the beginning of its CRM strategy, "The positive impact of our recent SalesLogix implementation is highly visible to employees and stakeholders alike. Yet, the expectation level for business process automation had not been met and there was a need to review all processes and streamline them to include as many automated steps as possible."

It was at this point that it turned to the Business Process Management (BPM) solution TaskCentre, because of its reputation and history within the SalesLogix channel.

### **Home Learning College and its use of TaskCentre to enhance partner connectivity and credit score activities.**

The variety of methods used to deliver educational products and services today is a far cry from that of ten years ago and Home Learning College has been a key driver of this transformation.

A key competitive advantage of Home Learning College is its ability to deliver courses through virtually any channel and one of its key channels is via traditional establishments such as colleges and private tutoring providers. This was stated by Cathy, "We work in partnership with a number of partner organisations so that we can offer the best possible choice of delivery methods to students. However, this created a great deal of administration in the form of new enrolment information having to be processed and forwarded to the relevant partner organisation(s)."

To remove this administrative burden and improve the flow of critical information between Home Learning College and its partners, TaskCentre is used to automate the entire process, "We've used TaskCentre to automatically query SalesLogix on a scheduled basis, format the retrieved information as a CSV file and then send it via e-mail to our partners. This automated process has eradicated hours of work for our administrators and dramatically improved the delivery of information to our partners."

Another manual employee process that the company wanted to automate was the approval of instalment

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payment plans. Naturally, it is important that no errors occur in this area as it may lead to bad debt being incurred by the company.

Historically, the company would manually monitor and retrieve credit scores before authorising an instalment payment plan, but Cathy explained how TaskCentre has been used to remove this burden, "We now schedule TaskCentre to automatically update the SalesLogix database with the fresh credit scores we receive from Equifax credit score service. It is now the case that those who authorise instalment plans have perfectly accurate information and levels of bad debt have reduced."

### **TaskCentre and the automatic creation and delivery of management reports**

The phrase 'information is the currency of business' has never been truer than for organisations today and Home Learning College were of the opinion that it was no longer acceptable for the emphasis to be placed on employees to continually monitor and extract information from applications. Cathy highlighted this when she said, "Successful companies are driven by accurate and timely management reporting procedures. However, very few managers or employees have the time to create and distribute reports and this is why we are using TaskCentre to automate these valuable documents."

It also uses TaskCentre to produce and send MS Excel files to the external bodies. The business benefits were the saving of around 30

minutes a week on this single automated process. This was something that Cathy pointed out when she said, "By automating our report creation and distribution we've a) removed the needless and repetitive administration placed on employees and b) ensured that the reports include real-time information that is 100% accurate."

### **Home Learning College, its thoughts on TaskCentre and its future plans for the product**

The tangible business benefits that TaskCentre has provided, when used in conjunction with SalesLogix, were made perfectly clear when Cathy said, "I would say that TaskCentre is the perfect complimentary solution for SalesLogix as the benefits it delivers are instant. Its Graphical User Interface (GUI) makes automating employee processes very quick and easy. I'd also say that it is a great integration tool for those companies that want to pass information to and from other applications to SalesLogix."

With regards to the company's future use of TaskCentre, it plans to use it to pull orders directly from the web site and automatically enter them into SalesLogix. Home Learning College are also planning to extend this automated new order process by passing the event information over to its Sage ERP solution so that the financial elements of this process can be dynamically triggered and automated.