



Case study



College of
Natropathic Medicine
Bespoke CRM

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Overview

The College of Naturopathic Medicine is the leading training provider in Natural Therapies in the UK.

They commissioned us to develop a bespoke CRM system to allow their sales & marketing teams to easily manage day-to-day workflows of their sales, marketing, course consultation and student enrolments.

As more potential students around the world are enquiring about CNM's training and diploma courses, it became apparent that there's a strong need for a CRM system to manage the full sales cycle. From capturing lead enquiries, through allocating specialist consultants to help prospects choose the best course options, up to enrolling and converting prospects into CNM students.

As some of the core business requirements for this CRM were very specific to CNM and could not be catered for by any off-the-shelf CRM products, we designed and developed a tailor-made solution for the college.

Some of the bespoke features that were implemented in the CRM are:

- Integration with existing legacy systems that have been used by the business for many years
- Migration of 25 years' worth of sales information held in proprietary college systems.
- Robust API to support automatic importation of leads and contacts from different websites.
- Automated assignment of incoming enquiries to appropriate course consultant in the relevant region.
- Automated calculation of variable sales commissions.
- Integration with office 365 outlook email accounts to capture all consultant / client interactions.
- Shared calendars for senior consultants.
- Improved KPI and Analytical reporting.

Challenges and objectives

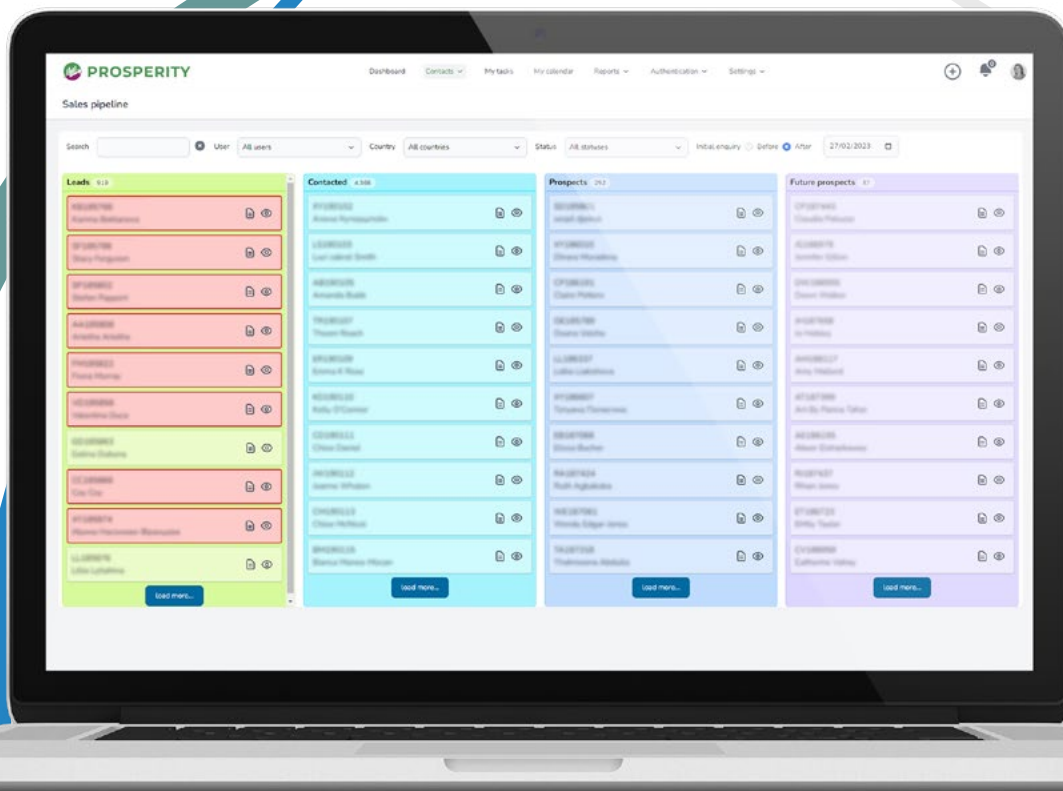
One of the biggest challenges in this project was the migration of existing data from the college's legacy systems. This process took the longest time, not just because of the large amounts of data that needed to be migrated, but also because of the need to categorise and classify it before it was migrated into a modern relational database.

The college has been using bespoke systems for over 25 years and some of those systems had to be integrated or synced with the new CRM.

It was essential to capture all the data that was accumulated over the years and transfer it in a better structured and categorised form into the new CRM.

The system needed to be predominantly used by sales and marketing teams on a daily basis, but also help senior management to analyse and visualize customer data to better understand the progress and status of their sales opportunities.

The CRM needed to be integrated with the college's website enquiry forms and their current enrolment system.



Our solution

We conducted a thorough business analysis and captured current business requirements along with future requirements.

After agreeing on the main priorities, we wrote a functional specification to outline the development of the CRM to the college's requirements.

We built a secure, cloud-based application, accessible to permitted staff from all over the world.

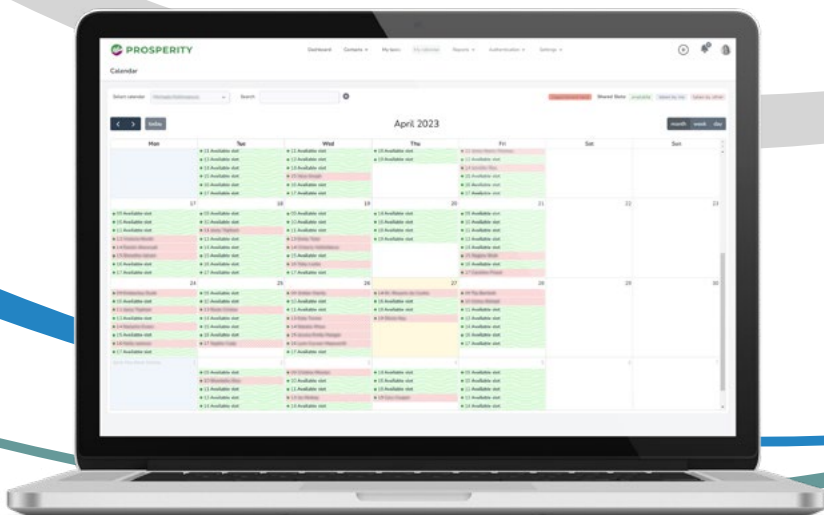
The CRM is integrated with the college's website forms. When website visitors fill in an enquiry form, it is processed and assigned automatically to the relevant sales consultant according to a set of evaluation criteria.

Consultants are notified when a new enquiry is assigned to them and then use different aspects of the CRM to capture and track the progress they make with each lead.

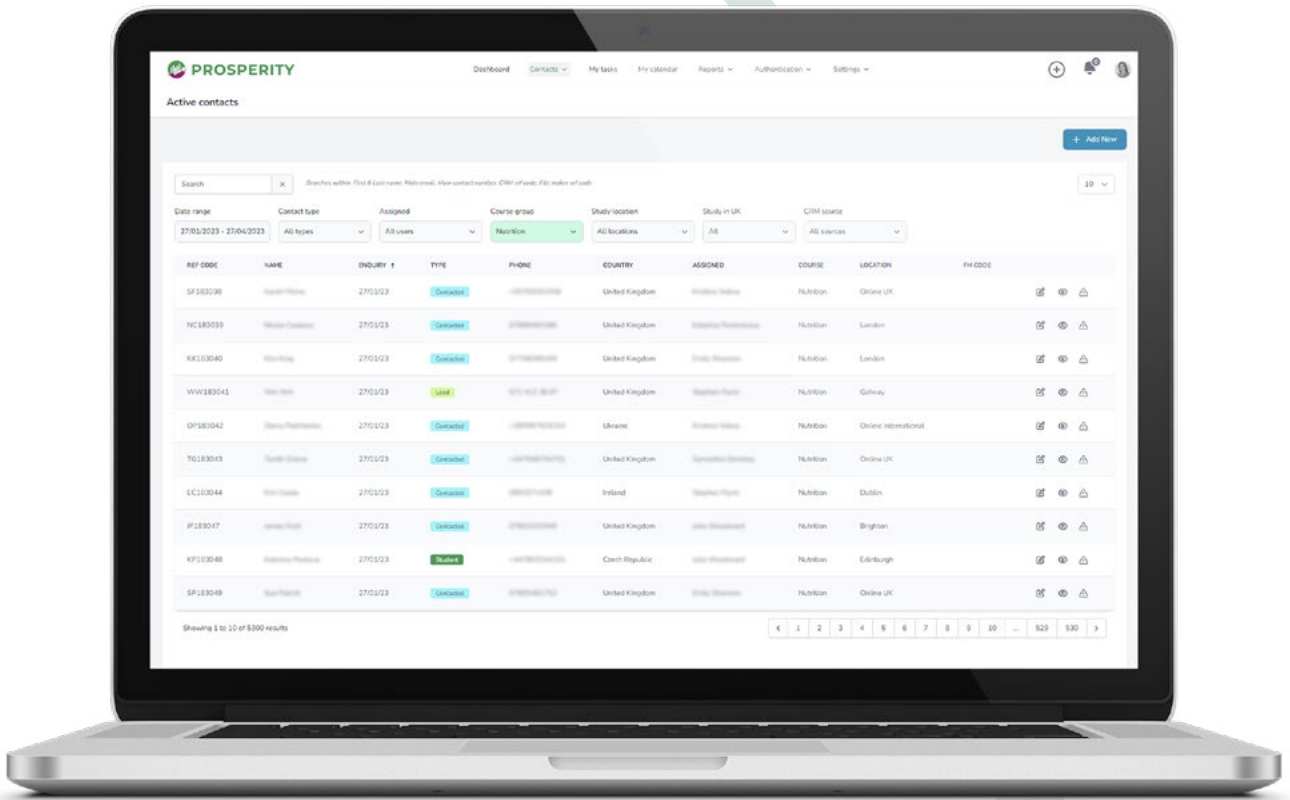
They can manage their own calendar, view and book appointments on shared calendars & capture their daily tasks into their 'to do list'. They can also set up reminders for specific date & times.

The CRM holds a repository of company email templates which are available for consultants to use when they want to send information to prospects. These templates can be used as is or modified and personalised as required. This ensures that the correspondence of all consultants is kept consistent and every outgoing and incoming email is logged and saved against the relevant lead/prospect.

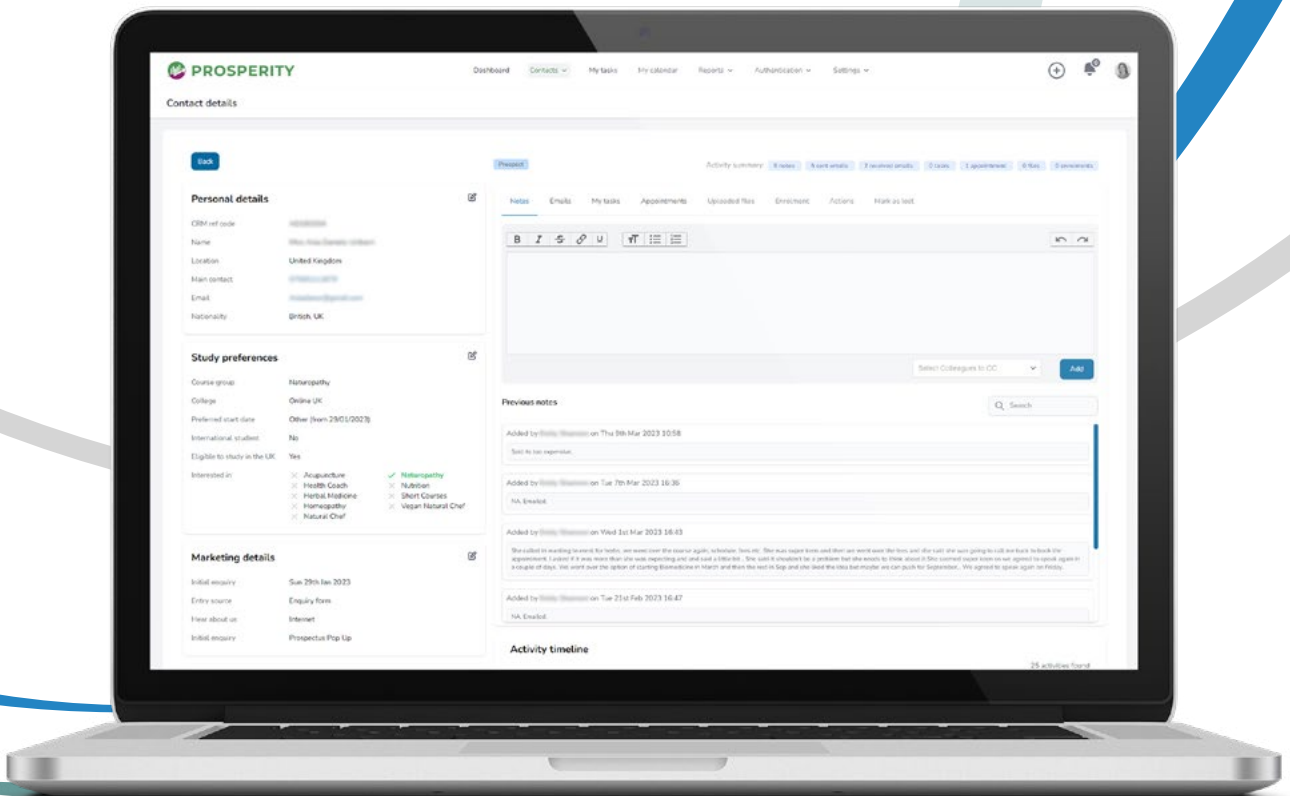
The CRM is introducing automation for manual repetitive processes. For example, it is capable of calculating sales commissions which helps senior management speed-up this complex and time-consuming monthly task.



Shared calendars of senior consultants allow the staff to be in sync with all bookings and meetings at a glance



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Results

- The CRM is being used by over 50 college staff members on a daily basis to log the process of converting leads into students.
- Workflow automations introduced by the system are saving time and human resources
- Shared calendars of senior consultants allow the staff to be in sync with all bookings and meetings at a glance
- Senior management are able to view current sales pipelines & reports as all information is held in one central place.
- The cloud-based, modern CRM is replacing an antiquated proprietary database. The user interface is user-friendly, modern and consistent
- The system is increasing efficiencies and optimizing internal operations, while improving data classification & quality.

PROSPERITY | Dashboard | 18/06/2022 - 25/06/2022

Your statistics

- Leads: 10
- Prospects: 45
- Enrolments: 12
- Lost: 0

My latest new leads (18/06/2022 - 25/06/2022)

REF CODE	NAME	INITIAL ENQUIRY	COUNTRY	COURSE	LOCATION
18062022	Yusef McLean	22/06/2022	United Kingdom	Herbal Medicine	Brighton
18062022	Yusef McLean	22/06/2022	Mozambique	Natural Chef	Birmingham
18062022	Yusef McLean	22/06/2022	Mali	Herbal Medicine	Brighton
18062022	Yusef McLean	22/06/2022	Mali	Short Courses	Edinburgh
18062022	Yusef McLean	22/06/2022	Mauritania	Herbal Medicine	Belfast
18062022	Yusef McLean	22/06/2022	Senegal	Vegetarian Natural Chef	Online UK
18062022	Yusef McLean	22/06/2022	Norfolk Island	Nutrition	Cork
18062022	Yusef McLean	22/06/2022	Mali	Health Coach	Online UK
18062022	Yusef McLean	22/06/2022	China	Acupuncture	Belfast
18062022	Yusef McLean	22/06/2022	Chad	Herbal Medicine	Online Ireland

My latest call-back dates (18/06/2022 - 25/06/2022)

REF CODE	NAME	CALL BACK DATE	STATUS	COUNTRY	COURSE	LOCATION
18062022	Yusef McLean	22/06/2022	Appointment requested	Burkina Faso	Acupuncture	Belfast
18062022	Yusef McLean	22/06/2022	New lead	Mali	Natural Chef	Dublin

My outstanding tasks (18/06/2022 - 25/06/2022)

CREATED	TITLE	PRIORITY	Due	CONTACT	REMINDER
17/06/2022	Go onboarding with leads	Normal	25/06/2022	Yusef McLean	25/06/2022
17/06/2022	Registration	Normal	22/06/2022	Yusef McLean	17/06/2022
17/06/2022	Plan onboarding	Normal	22/06/2022	Yusef McLean	17/06/2022
22/06/2022	Training Consultant	Normal	25/06/2022	Yusef McLean	22/06/2022

My calendar entries (18/06/2022 - 25/06/2022)

DATE & TIME	STATUS	TITLE	LOCATION	CONTACT
18/06/2022 13:00	Full	Yusef McLean	Yusef McLean	Yusef McLean
23/06/2022 18:22	Full	Yusef McLean	Yusef McLean	Yusef McLean

My new leads (18/06/2022 - 25/06/2022)

My enrolments (18/06/2022 - 25/06/2022)

My callbacks (18/06/2022 - 25/06/2022)

My new leads by course (18/06/2022 - 25/06/2022)

My new leads by source (18/06/2022 - 25/06/2022)

“ Client quote

“CM System Designs is an exceptional software and web development company that truly stands out. From the moment we engaged with them, we were impressed by the professionalism and expertise of their staff.

They were excellent throughout the entire process, from the initial specification stage right through to the delivery of the final application.

What really sets CM System Designs apart, is their commitment to providing ongoing support and improving their software to meet their clients' ever-changing needs.

They are proactive in their approach, always seeking ways to enhance the software and make it more efficient and effective for their clients. This level of dedication and customer service is rare and is a testament to the high standards of the team at CM System Designs.

Overall, we could not be more pleased with our experience working with CM System Designs. Their software has exceeded our expectations, and they have been an absolute pleasure to work with.

We would highly recommend them to anyone in need of top-quality software development and support services.”

They were excellent throughout the entire process, from the initial specification stage right through to the delivery of the final project

Future plans

As the CRM accumulates more and more data, we are planning to enhance the reporting facilities and add more analysis tools that will present results in various forms of charts, graphs, dashboards, reports and allow users to customize and interact with them.

As all data is kept in one place and uses the same format, it can greatly enhance management capability to align goals and strategies and improve their decision-making.

The next phase of development will be building an online enrolment system that will allow enrolees from all over the world to enrol on a variety of courses in different languages and pay online in multiple payment options and currencies.



We can provide low-cost, bespoke, web-based solutions to make your business more **efficient**, more **responsive**, more **secure**

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We'd love to hear from you