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COMPANY CASE STUDY

ECG TRAINING

ecg

COMPANY BACKGROUND

ECG are a healthcare training provider, based in Milton Keynes, who offer mandatory, clinical and soft skills training required for healthcare professionals working in primary or secondary care. Courses are delivered onsite or online and open courses are available nationwide. ECG Training is now in its 17th year and has seen significant growth due to the COVID-19 Pandemic and the increase in healthcare professionals requiring training.

Pragmatiq implemented a Bespoke Training Management Solution which has transformed the course management process for ECG.

CHALLENGES

> Previously operating with a manual setup which was heavily reliant on Microsoft Outlook calendar

> Running a high volume of training courses per day meant manual way of working was inefficient

> Managing and tracking communication with course trainers and attendees was a manual process

> New course enquiries relied on individuals to ensure they were followed up

> Reporting was a manual, admin-heavy task each month

SOLUTION

> Designed and developed a bespoke Training Management Solution

> Redesigned and systemised manual processes in the most efficient way

> Provided a structured way for enquires to be registered and followed up

> Implemented a logical process for new training courses and associated information

> Implemented an Outlook Integration

> Setup dashboard overviews within Dynamics

BENEFITS

> Time saved across the business

> Improved reporting and insights

> Business continuity

> Platform to grow other areas of the business

> Enhanced communication tracking

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CHALLENGES

Previously, ECG Training was operating with a manual setup that was heavily reliant on Microsoft Outlook calendar. ECG runs a high volume of training courses per day and calendar invites were used to hold information relating to training courses, location, trainer details, attendee details, etc. This way of managing information presented challenges around visibility, efficiency, and lost information, as Outlook is not designed for this purpose.

Managing communication with course trainers and attendees was also a manual process and each week, relied on a member of staff to pull together individual schedules and email these to the recipients. Further communication was difficult to track and also presented challenges from an auditing perspective, as information was stored in lengthy email threads and spreadsheets. When new course enquiries were created these were also handled manually and relied on individuals to ensure they were followed up, which could be more efficient with a systemised tracking process in place.

On top of this, some data was manually extracted out of calendar invites into spreadsheets, to capture additional information. This process meant that data was at risk of being duplicated, prone to errors, and also wasted valuable time entering information into multiple applications. Due to this, employees lacked clear visibility of what they needed to support them in their day-to-day tasks.

From a business continuity perspective, the lack of a centralised solution presented challenges, as ECG Training was heavily reliant on employee knowledge and expertise. Lastly, reporting was heavily impacted due to the disparate information and producing basic reports was a manual, admin-heavy task each month.

SOLUTION

We established early on that the standard Dynamics 365 Applications were not suitable for ECG Training and there was the possibility to use Power Apps, part of the Microsoft Power Platform, to design and develop a bespoke Training Management Solution.

As the majority of ECG Training's processes were completed manually, we had to redesign and systemise these in the most efficient way. There was a significant focus on designing the management of training enquiries and the overall management of training courses, to reduce admin, aid user adoption and ensure that all departments could quickly access the data they needed.

For new enquires, we provided a structured way that enquires could be registered and effectively followed up, alongside an individual having the ability to then progress the enquiry through to a training course within the system, if required.

For new training courses, there is now a logical process to create a course, book trainers, locations, multiple sessions with a course, calculate financials and notify the required people of a new booking. Having data centralised around training courses also enables ECG to send weekly schedules to each of the trainers and provide access to internal trainers to view their upcoming rota directly in the system.
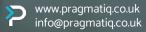
From an automation perspective, we enabled a group of courses to be cloned, enabling the quick creation of courses and sessions in the systems. This process would have previously been conducted manually and now saves both time and effort across the business.

We also implemented the Outlook Integration for tracking email correspondence, which will assist auditing and make this process more efficient. Alongside this, ECG Training adopted email templates, allowing required information at certain points in the course process to be generated and sent.

To improve reporting capabilities and provide staff members with greater visibility of information, we setup dashboard overviews within Dynamics. This provides an overview of key areas, such as courses that need attention, where auditing is yet to be completed, total number of upcoming courses planned, any outstanding enquires, etc. This information is presented in a visual, easy-to-read format so employees can see clearly what needs to be followed up and what actions need taking day-to-day.

"After outgrowing our training management calendar, we contacted Pragmatiq to help us design a bespoke system for our unique requirements. We are a fast-growing business requiring a system that is able to keep up with the pace and provide us with quick processes, reports and dashboards for all departments. We have worked closely with the team for over 12 months and we are over the moon with where we currently are. Jamie guided us with the best solutions to meet a logical workflow."

CLARA TRAVERS - HEAD OF OPERATIONS AT ECG TRAINING

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BENEFITS

Through the implementation of our solution, the following benefits were realised:

> **Time saved across the business** – By systemising the processes relating to training courses, time is saved across the business. Employee productivity has also increased as staff do not need to search through Outlook invites and spreadsheets to find required information, allowing them to save time and remain focused on their tasks.

> **Improved reporting and insights** – The Training Management Solution centralises business data and accompanied by the dashboard overviews, saves hours of time spent previously gathering data to build reports and generate basic insights. This also provides immediate access to live and accurate data and therefore will vastly improve decision-making abilities.

> **Business continuity** – Business processes are now logically systemised in the new solution and data is accessible to those who need it. The new system also the onboarding process of new staff, as there are structured processes to follow optimises.

> **Platform to grow other areas of the business** – ECG Training recognise the benefits of the Training Management Solution and are looking for other areas of the business where this solution could be rolled out; The nature of Dynamics and the Power Platform means that the solution can be customised to suit future requirements.

> **Enhanced communication tracking** – ECG Training can now manage and track all email communications. Having a secure process for this is important for auditing purposes, as well as ensuring emails are followed up in a timely manner.

"In this project, we successfully moved ECG Training away from a manual and time-consuming system that was heavily reliant on Microsoft Outlook calendar, to one that ensures all users are working to a standardised process, reduces admin and centralises their data. This ultimately enables them to gain a clear overview on what is going in their business, improve productivity and provide a platform for scalability and growth."

JAMIE EVANS - TECHNICAL DIRECTOR AT PRAGMATIQ

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