

COMPANY CASE STUDY

L.E.A.D. TEACHING SCHOOL HUB



L.E.A.D.
Teaching School Hub
Lincolnshire



COMPANY BACKGROUND

L.E.A.D. Teaching School Hub supports schools to grow, recruit, develop and retain the very best teachers, support staff and leaders.

The role of the Hub is to promote the importance of high-quality continuing professional development from Initial Teacher Training through to executive leadership, supporting teachers throughout their career in a sequential and cohesive way.



CHALLENGES

- › Previously operated with disparate systems and spreadsheets
- › Lack of a centralised system made it incredibly difficult, manual, and time-consuming to access information
- › Difficult to gain a holistic view of a teacher's career, the courses they have been on, and the schools they have worked at
- › Data siloes and disparate systems also presented challenges from a reporting perspective
- › Limited opportunities for automation
- › Required a system that could be tailored to suit their requirements and fit around how they worked



SOLUTION

- › Designed and implemented a Bespoke CRM System, built on Microsoft Dynamics 365
- › Ability to manage all stakeholder records and view connected relationships amongst these
- › Easy to track information such as school performance, Ofsted visits, engagement levels, teacher participation, etc.
- › Implemented an Outlook Integration
- › Implemented Dynamics 365 Customer Voice to send course surveys
- › Established a robust reporting setup, allowing management to gain insights and interrogate data daily



BENEFITS

- › Improved visibility and access to information
- › Platform for future growth
- › Improved reporting
- › Enhanced productivity

CHALLENGES



L.E.A.D. Teaching School Hub previously operated with disparate systems and spreadsheets, to manage data across the organisation, such as stakeholder communication, training courses, teacher journeys, school engagement, and more. The lack of a centralised system made it incredibly difficult, manual, and time-consuming to access information that is needed day-to-day, across various departments.

Teachers require multiple qualifications & courses to progress in their careers. It's important for L.E.A.D. to facilitate this progression and without a system, they lacked a holistic view of a teacher's career, the courses they have been on and the schools they have worked at. This information is vital in identifying where a teacher is in their journey, which then determines which courses they should continue to engage in order to progress.

Due to the nature of the industry, L.E.A.D. is required to work with many separate Portals that hold data about different schools and institutions. The organisation maintains a series of its own spreadsheets, alongside these Portals, to track information about courses, attendees, and other key information. As a result of this disparate setup, users are often required to enter the same data in multiple systems. Not only was this process extremely cumbersome, there was also potential for human error.

Data siloes and disparate systems also presented challenges from a reporting perspective. With information residing in different applications, and a disconnected way of working, management lacked the ability to gain key insights into certain areas of the organisation, such as course statistics or school engagement.

On top of this, L.E.A.D. must produce comprehensive reports 6 times per year for the Department for Education (DfE). These reports detail statistics such as the number of teachers that are engaging with courses, which schools are high performing vs those who are not engaging as much, etc. This information is then further segmented by areas such as location, school type (primary, secondary, etc.), and type of course (CPD, ECF, etc.). With the previous setup, generating these reports was a very time-consuming and manual process, to find and collate all the required information from the suite of spreadsheets and portals.

The decentralised nature of the organisation's data also meant there were limited opportunities for automation, which led to significant effort being expended tracking day-to-day activities. L.E.A.D. recognising this and automating several of the processes across the organisation was a key driver for the new system.

L.E.A.D. required a system that could be tailored to suit their requirements and fit around how they worked.



SOLUTION



After gathering L.E.A.D.'s detail requirements, Pragmatiq designed and implemented a Bespoke CRM System, built on Microsoft Dynamics 365. The system focused on two main areas; Stakeholder Management (to capture information around schools, teachers, training providers, local authorities, etc.) and Course Management and Delivery (details around course participation).

Within the Bespoke CRM, L.E.A.D can manage all stakeholder records and view connected relationships amongst these. For example, an individual could work at one school, but occasionally support other schools. Custom functionality was built within the system to manage this unique process and enable users to easily view related records, without having to gather this information from various places.

To track relevant information around schools, functionality was built so that information such as school performance, Ofsted visits, engagement levels, teacher participation, etc., is visible from one place. As well as improving efficiency, users can make data-driven decisions and ultimately, make better recommendations to schools.

We also implemented an Outlook Integration, providing visibility of correspondence with stakeholders (such as emails, phone calls, appointments, etc.). Previously, this communication was largely stored in individual Outlook inboxes, causing challenges when someone was absent and there was no visibility of communications elsewhere.

Across L.E.A.D., there is a high volume of courses that are managed. Each of these is managed in a different way; some require only attendance tracking, others require more information such as the ability to organise the course, plan multiple sessions over various days, document the person delivering the course, track attendees, etc. The ability to manage these elements is built into the new systems, so users can track courses from planning through to delivery and all activities that follow.

Previously, L.E.A.D. sent surveys out to individuals who had attended courses, in order to gather feedback and improve their offering. Google Forms were used to send these out manually to each attendee, which was a time-consuming process. There are various types of surveys that need to be sent, including those that needed to be sent per session (for shorter courses), but also those that were sent periodically throughout the duration of a longer course. To support this process within the new solution and improve the process, an integration with Dynamics 365 Customer Voice was established.

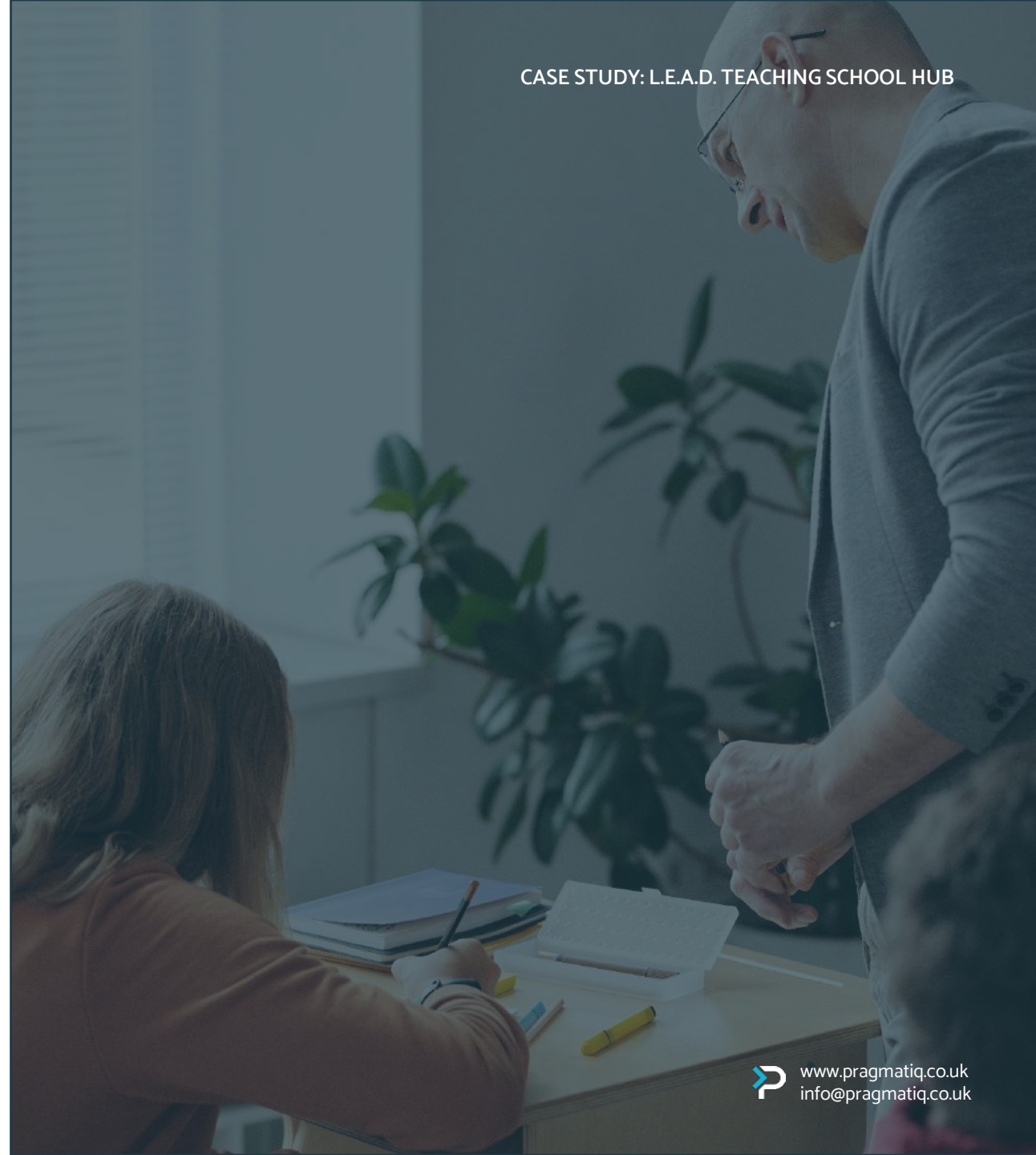
SOLUTION CONTINUED



On top of this, we implemented an integration with SharePoint to store any relevant documentation against contacts and courses, such as agreements with school, training material, certificates, etc.

To enable L.E.A.D. to work more effectively with the Portals they need to access, we created a space within the system that centralises the links to access these portals, so users can locate the information they need within a couple of clicks.

Finally, we established a robust reporting setup where connected data is refreshed in real-time, allowing management to gain insights and interrogate data daily. Dashboards present key statistics, such as school participation for each academic year, so management can more informed decisions about where to focus their efforts. On top of this, the DfE reports that were previously being produced manually several times a year, can now be automatically generated based on the required information in the system.



BENEFITS



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

- > **Improved visibility and access to information** – By moving L.E.A.D. away from disparate systems and spreadsheets, users reduce time searching for information and can conduct their daily tasks more efficiently.
- > **Platform for future growth** – By migrating business processes into Dynamics 365, L.E.A.D. benefit from immediate improvements to efficiency, usability and security. Longer term, the solution provides a foundation to grow and expand processes, with potential to introduce more automation, an integration with Portals, or adopt the marketing application, to name but a few.
- > **Improved reporting** – By establishing a robust reporting setup where connected data is refreshed in real time, management can gain insights and interrogate data daily. In turn, this will enable L.E.A.D. to get more control of their operations and highlight areas that need extra focus and improvement, as well as areas that are performing well. Additionally, reports for the DfE can be produced automatically; an activity that was previously a very time-consuming and manual process.
- > **Enhanced productivity** – The bespoke system accurately reflects the way the organisation works, providing a better user experience and enhancing overall productivity. For example, users can easily follow a teachers journey throughout their career and all relevant information, from one solution.



“We approached Pragmatiq after speaking to two large CRM providers, who offered ‘off-the-shelf’ products, which we felt wouldn’t fit with our outcomes and they also couldn’t understand how a CRM would benefit our business.

Right from the initial meeting, we felt like this would be the company for us! Everyone really took the time to understand our business, what we wanted to achieve, and they offered solutions and suggestions all the way through (even things we hadn’t thought of).

As a company, we often talk about collaboration and partnership working. This project was most definitely a real partnership to achieve a system which will help us to change the way in which we communicate with schools and delegates, supporting the customer segmentation, targeted marketing and future engagement with our work.”

SOPHIE HAYES-WATSON – OPERATIONS MANAGER AT L.E.A.D TEACHING SCHOOL HUB

CAN WE HELP YOUR ORGANISATION?

Pragmatiq are a Microsoft Partner, specialising in building bespoke technology solutions that solve real problems and make a difference.

If you want to learn more, please get in touch...

- > **Email** - info@pragmatiq.co.uk
- > **Phone** - 01908 038110
- > **Website** - www.pragmatiq.co.uk