

Oxygen Learning

Sugar CRM for Training & Development organisation



Oxygen Learning offer training & development interventions and conference content which provides individuals and organisations the tools to create effective change

What was the challenge?

- A need to have a contact relationship management system in place for better client service
- Greater visibility of contacts within client organisations, to enhance cross-selling opportunities
- Recording of training and conference programme information on delegates; a way to ensure a great experience for delegates throughout their relationship with Oxygen
- Reporting on sales opportunities against lead source, progress and success.

What did we do?

- Conducted robust analysis of their current process and workflow
- Introduced on-line Sugar CRM system, tailored to meet their specific needs
- Customised system to handle delegate information on training and conference programmes
- Introduced on-line delegate booking from web-site to CRM automatically

What was the result?

- Enhanced & dynamic management information and reporting to guide the sales and marketing effort
- Greater collaboration between account managers handling large accounts; maximising sales opportunities within each client organisation
- Enhanced levels of service and support to programme delegates; delivering a better experience to all

“They are fantastic to work with because they work really hard to understand our strategic objectives as well as the practical realities of our business..... this has enabled us to build an honest, uncomplicated and very enjoyable working relationship.”

Jo Bootle, Office Manager, Oxygen Learning

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