



University Continuing Education Case History

GeoMetrix helps a university's business school manage continuing education.



Sector:	Education
Institution:	University
Faculty:	School of Business
Program:	Continuing Education
Locations:	3
Graduates:	20,000
TrainingPartner purchased:	2007
Learner Licensing:	5,000
Administrator Licensing:	20

In 2007, the school of business at one of Canada's largest universities went looking for an integrated registration and customer relationship management (CRM) system. At the time, the school's continuing education program used different Web-based applications for registration, CRM and email, which were not linked together.

As a result of a change in leadership, increase in revenue and setting of ambitious goals, changes were necessary both to business rules and to the accommodating infrastructure. It was determined that the old system had become outdated, lacked necessary functionality and had reached the end of its useful life cycle.

Key functionality required for the new system included improved reporting capabilities, automated waitlist maintenance, ability to locate/rectify multiple profiles, online supervisor access and functionality for attaching documents to records.

A search for a new integrated system began with a request for proposal (RFP) and ended with the

selection of the TrainingPartner Learning Management System (LMS) from GeoMetrix Data Systems Inc.

From the responses to the RFP, the business school shortlisted two vendors. Multiple product demos were presented to university stakeholder groups and careful reference checks were carried out.

The result of this extensive product & vendor investigation was buy-in from the whole selection team on the one LMS.

The business school staff had been tracking student information in two relational databases. With the introduction of a new system, they were offered the opportunity to redefine business policies and workflows to create a more powerful and efficient learning management environment.

Many of these new rules and processes were defined with the help of GeoMetrix in an on-site needs analysis, while further decisions about the use of the LMS were made during subsequent training of key stakeholders.





The business school's personnel have since attended two User Conferences held by GeoMetrix.

The university took advantage of these events to meet GeoMetrix technical staff in person and to network with other LMS users.

The personnel participated in conference sessions that provided in-depth knowledge of the LMS's functionality and introduced new features released since they purchased the software.

One of the major benefits of the LMS is the ease with which it can be modified.

The LMS's configuration options allow for easy changes to language tags, statuses, dialog names, field locations and more to match preferences and workflows. In fact, the form editor lets a system administrator modify any screen or dialog to meet naming conventions, processes and business practices.

While most of the business school's needs were met out-of-the-box, continuing education personnel chose to have GeoMetrix perform customization work to accommodate special requirements. These modifications included creating a new pay-rate

field in the instructor qualification properties.

Additional payment types were added to financial records to accommodate university practices. A university policy that requires certain groups to obtain HR approval for enrollments is met with a combination of a new custom field, automated e-mail notification and online "supervisor" approval form. Another customization assigns a default supervisor to new students who are government employees.

For online access, several different user groups were identified and each was given its own online portal using TrainingPartner Online. The online interface's home page was modified to allow students to identify which group they belonged to using hyperlinks and pop-up descriptions.

Along with different look and feel for the portals, different data displays and options are available to users depending on the group's needs, creating an easy-to-use and intuitive online experience.

These changes to the online interface were made using a built-in design tool in TrainingPartner that lets non-Web developers build or modify Web pages with a library of components and elements.

The continuing education staff also had a need to run e-mail campaigns, which can be handled using LMS's CRM module. The CRM's campaign functionality can perform e-mail merge reports, and campaigns can be automatically launched on a timed basis using scheduled actions.

Out-of-the-box, the LMS is a huge step forward in making processes more efficient and offering capabilities that didn't previously exist.

Streamlining enrollments, maintaining ease-of-use and supplying extensive reporting are all benefits that will help the school meet its objectives.

In addition, the ease with which the LMS can be modified is enabling the program to drive practices and infrastructure. The ability of the LMS to be crafted to meet changing needs bodes well for the future.

The business school has made major improvements to its continuing education program, and we at GeoMetrix are proud to be a part of that.

About GeoTalent & TrainingPartner

GeoTalent is a unified Talent Management System that incorporates our TrainingPartner LMS. This cost-effective alternative to high-priced enterprise systems offers the customizability that GeoTalent customers have come to know.

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