

The Client

The Australian Institute of Management New South Wales and Australian Capital Territory (AIM NSW and ACT) has become the first division of AIM to migrate to the cloud. They chose Salesforce and Learnsmarter to provide a CRM and a training management system that work seamlessly together, supporting the Institute's provision of services that include business and management training, events, seminars, and coaching.

The Australian Institute of Management (AIM) is a not-for-profit organization formed 60 years ago to promote the advancement of education and learning for managers and leaders in commerce, industry and government. More than 25,000 managers at every level and over 5,000 businesses nationwide belong to the AIM Network. The network employs over 280 staff in five divisions.

The Challenge

Some years ago, AIM NSW and ACT realized that they needed to upgrade their systems. A two-year journey began by evaluating their needs and core business requirements. They looked at over ten CRM or Student Management systems, hoping to find one with a corresponding learning management and student/course administration module to support their core business activities. Unable to find a suitable product, they approached vendors with a view to upgrading their current, or developing a brand new, bespoke solution.

The Dilemma

Given AIM's extremely customized existing system, upgrading could prove to be more than a million dollar undertaking, and building a new bespoke solution was fraught with risks.

The Cloud Opportunity

AIM NSW and ACT carried out a pre-implementation study of Salesforce. The system looked promising, but they had to make sure that what they wanted to do was achievable - and wasn't going to be the cost blowout that customization promised. They also had to find a solution to manage their training delivery operations.

"Streets ahead of the other options"

Learnsmarter provided that extra functionality. "It was streets ahead of the other options," said Edward Austin, Senior Business Analyst. "It really fits that space in the market."

Case Study : AIM NSW and ACT

Learnsmarter and Salesforce.com provided the Australian Institute of Management with an enterprise class and highly configurable training management and CRM system in significantly less time and without the cost and risk factors associated with developing a bespoke solution.

"I couldn't have imagined a year ago getting our systems to where we are today. Learnsmarter has been a key part of that."

Edward Austin,
Senior Business Analyst,
Australian Institute of
Management, NSW and ACT

Industry : Training
Region : Australia
Product : Learnsmarter Core



Case Study : AIM NSW and ACT

The Decision

AIM IT resources met with Learnsmarter. The application seemed to fit AIM's needs well and they were impressed at the depth of experience that the Learnsmarter team had. "These guys really knew what training management businesses required in an app," said Austin. As a native application built on the force.com platform, using Learnsmarter meant they could keep everything in Salesforce, with the huge benefit of having all their data in one place. Where necessary they could extend the functionality themselves adding custom objects and tabs.

The project feasibility study came back as a) cost effective and b) capable of meeting their business needs. Armed with this information the project team pitched the solution to the AIM NSW and ACT Board.

The Board posed a range of questions about the storing of data, security and mitigation of the risks involved. Convinced by the answers, they signed off and the implementation began.

The Migration

Salesforce CRM was implemented in an initial six-week phase. The second phase took just three and a half months, including implementing Learnsmarter for 40 users and adding NetSuite as the accounting package. As Austin said: "Basically moving the entire organization into the cloud."

"We share what we want ... they listen"

Austin was very enthusiastic about working with Learnsmarter. "We can share that this is what the business wants and they listen. They have incorporated some of our suggestions as they continue to develop new Learnsmarter features."

Ben Tym, project manager said: "Learnsmarter have been fantastic: approachable, collaborative and understanding of what an organization like ours needs. They have been quick to respond to our concerns and suggestions. It has been very good from a relationship perspective."

Down Under with Learnsmarter

The implementation of Salesforce and Learnsmarter within AIM NSW and ACT has been watched with interest by fellow divisions within the Institute. A potential merge with other AIM divisions is expected to expand the implementation further, giving the other divisions the opportunity to benefit from their partner's successful strategy of migrating to the cloud.



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