Achieving Rapid User Adoption in a Complex Global CRM Implementation

Expense Reduction Analysts

A Global Training Challenge

With more than 700 consultants operating in over 35 countries, **Expense Reduction Analysts** boasts international expertise while simultaneously offering a local presence to clients.

Through in-depth industry knowledge and insight across a variety of expense categories, Expense Reduction Analysts adds value to organisations by advising on industry-specific best practices, reducing costs and ultimately delivering tailored solutions to benefit business health and growth.

Keeping track of customers in many sectors and countries means a very complicated customer engagement strategy, and Expense Reduction Analysts have adopted **Microsoft Dynamics 365** to meet its CRM needs. Working with the UK-based **CRM implementation specialists at QGate**, the firm's management understood the challenges of deploying a new CRM internationally.

The Solution: the ClickLearn e-Learning Platform

To ensure user adoption in its franchises around the world, the team implemented a multilingual, scalable CRM onboarding training and custom help portal, using the **ClickLearn e-learning authoring platform**.

Over the course of 9 months, Expense Reduction Analysts worked closely with QGate on new development and data migration from their previous CRM provider. That effort has translated into an improved solution with noticeable differences. But that new and improved CRM only delivers value if it is properly utilised. The team knew that delivering training across industries and geographies could be challenging — and it could be expensive.

"*Many of our franchises may not have all the skills they need for working with Microsoft Dynamics. They need the extra assistance and a way to be shown how to perform these new tasks*" said David de la Nougerede, Global Head of IT at ERA.

ClickLearn: Record, Produce, Publish

Integrated with the full suite of Microsoft Dynamics 365

Automatically produces seven different types of content such as narrated videos, PDFs and live assistants

Helps to ensure user adoption

Easy onboarding

Customisable template system for compliance

Auto-translate all your learning materials into 45 languages at the click of a button

ClickLearn

QGate
CRM · Digital Transformation · Automation

ClickLearn - Delivering 24/7 Training Across the World

ClickLearn generates videos and documentation to guide users across different media formats and even offers pre-loaded translation capabilities for dozens of languages to rapidly adapt instructions. Expense Reduction Analysts has franchisees in more than 35 countries around the world, from the west coast of North America to the east coast of New Zealand, and is now able to conduct trainings easily across languages and time zones.

When it came time to adopt the ClickLearn online training solution, Expense Reduction Analysts were impressed by the functionality, ease of use and speed.

"The ClickLearn application provides a huge advantage to our training and communication efforts, allowing this training resource to be available 24/7 across the globe. It was a really good implementation, it allows our users to go through very different scenarios for working with our customised Microsoft Dynamics, which is very important in a training environment." said David de la Nougerede.

Expense Reduction Analysts can now conduct training and even more importantly offer 24/7 guided assistance, easily across languages and time zones. ClickLearn generates videos and documentation in different media formats and even offers pre-loaded translation capabilities for dozens of languages to rapidly adapt instructions.

About Expense Reduction Analysts

Established in 1992, Expense Reduction Analysts is one of the world's leading consultancy organisations specialised in cost optimisation and supplier relation management, by delivering Value through Insight™ to clients in both the private and public sectors.

Having adopted Microsoft Dynamics 365 for advanced CRM needs across multiple sectors and countries, Expense Reduction Analysts worked with ClickLearn partner QGate to achieve significant success supporting training across 35 countries, 20 languages and multiple time zones using ClickLearn.

ClickLearn is a very good tool if anyone has a need for training. When you approach something like Microsoft Dynamics, it's easy to get overwhelmed by what you see on the screen. ClickLearn is very useful to show you what to do and it can infinitely scale for different uses."

"Working with the QGate team, their experience in building training and user assistance content meant our users receive the support they need, when they need it. As we add new capabilities to the system the users get updated help and training content immediately."

David de la Nougerede, Global Head of IT at Expense Reduction Analysts

Ready to talk about your training requirements?

Book a free no-obligation Discovery Call online at www.qgate.co.uk or call QGate on +44 (0) 1329 222 800