

Achieving Rapid User Adoption in a Complex Global CRM Implementation



With more than 700 consultants operating in over 35 countries, the award-winning business boasts international expertise while simultaneously offering a local presence to clients.

Through in-depth industry knowledge and insight across a variety of expense categories, ERA adds value to organizations 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 so many sectors and countries means a very complicated customer engagement strategy, and Expense Reduction Analysts has 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. 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.

SUPPORTING A NEW CRM SYSTEM

"Microsoft Dynamics can take quite a bit of development," says Klaus Jeschke, Global Chief Operating Officer at Expense Reduction Analysts. Over the course of 9 months, his team has worked closely with QGate professionals 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 utilized. 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 Dynamics. They need the extra assistance and a way to be shown how to perform these new tasks.”

Says David de la Nougerede, Global head of IT at Expense Reduction Analysts.

FACTS ABOUT EXPENSE REDUCTION ANALYSTS

- Established in 1992, Expense Reduction Analysts (ERA) is one of the world's leading consultancy organizations specialized in cost optimization and supplier relation management, by delivering Value through Insight™ to clients in both the private and public sectors.
- Needed to adopt Dynamics 365 for advanced CRM needs across multiple sectors and countries
- Working with ClickLearn partner QGate had significant success supporting training across 35 countries and multiple time zones
- Using ClickLearn to support 20 different languages

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Expense Reduction Analysts



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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.

“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,”
David de la Nougerede says.

When it came time to adopt the ClickLearn online training solution, Nougerede was impressed by the functionality, ease of use and speed.

“It was a really good implementation, it allows our users to go through very different scenarios for working with our customized Dynamics, which is very important in a training environment.”
Says David de la Nougerede, Global head of IT at Expense Reduction Analysts.

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.

“It’s a very good tool if anyone has a need for training. When you approach something like 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.”
Says David de la Nougerede, Global head of IT at Expense Reduction Analysts.

“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.”

FACTS ABOUT CLICKLEARN

- Integrated with the full suite of Microsoft Dynamics including Dynamics 365 Finance and Operations, Customer Engagement, Business Central, Dynamics AX, Dynamics NAV and Dynamics CRM
- Automatically produces seven different types of content such as narrated videos, PDFs and live assistants
- Helps to ensure user adoption
- Easy onboarding
- A customizable template-based system for compliance



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