



Helping Bupa get the most out of Microsoft Dynamics 365 Customer Engagement

To assist solution roll out by streamlining user adoption through the Identification of key learning objectives by the Operations and Service Teams. Implementing a user upskilling strategy that identifies and targets end-user and technical team knowledge gaps. Delivery of 'train-the-trainer' sessions.

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The Brief

As part of a new systems implementation and to support a merger with another health services provider, BUPA required custom training services to complement its deployment of a custom (Microsoft Dynamics) solution. As their CRM solution was highly customised to support internal business processes, BUPA required highly customised training that would provide a streamlined knowledge transfer to team members with measurable return on investment. BUPA required end-user training for all staff members as well as supporting customisation and configuration training for administrators. Each team had unique knowledge requirements and required a targeted train-the-trainer approach, that could be rolled out across teams and down

The Solution

Attending generic Microsoft Dynamics CRM public training courses was simply not an option for BUPA. They required custom courses and courseware that would provide a sound learning foundation for all staff members and at the same time drill down into unique individual and team requirements so that staff would be able to hit the ground running on day one of go live. BUPA engaged TTS to provide private on-site training for all staff members. Two groups were identified and trained in two separate engagements at the BUPA headquarters in Brisbane that isolated individual, team and organisational needs. To meet the requests specified by BUPA, the following strategy and services were implemented:

1. Learning requirements

discovery: Work closely with the operations and services teams to formulate a knowledge transfer strategy. Existing skill-sets and a 'train-the-trainer' approach to design and delivery needed to be considered.

2. Bespoke course design and delivery:

- a) Leveraging existing content stores maintained by TTS for Microsoft Business Applications.
- b) Perform gap analysis to identify the need for custom content.
- c) Build targeted content to map with individual and team-based learning objectives.

through the organisation. Specific project metrics included:

1. Identify and prioritize key learning objectives for individuals and teams.
2. Target specific learning objectives and at the same time encourage best practice methods and processes for Microsoft Dynamics.
3. Organisational business processes must be taken into context. Training content and exercises must map to these processes.
4. Deliver on-site to team champions in a train-the-trainer approach.
5. A high degree of experience and expertise with Microsoft Business Applications is desired.

- d) A well planned on-site delivery to key team champions tasked with the ongoing knowledge transfer to other team members through subsequent train-the-trainer sessions.

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Phone 1300 667 577

International +61 07 3303 0360

Email info@ttsolutions.com.au

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