



The Comprehensive IT Solution for Awarding Organisations

The Quartz information system has been developed by Portico Consulting to support the entire lifecycle of learning and qualification development and management.

Quartz supports all aspects of operations for programmes of vocational learning, QCF and other qualifications – including programme and qualification development, learner registration, achievement tracking, internal and external verification, and certification. Business management is supported through integrated CRM and business intelligence tools. Quartz provides substantial efficiency benefits, improvements in customer service, and compliance with regulatory requirements. It is scalable and affordable for large and small organisations.

Fact Sheet - Customer Relationship Management (CRM)

Why Use CRM?

Awarding bodies work in a complex environment with multiple stakeholders, where it is vital to manage relationships with a variety of organisations and individuals promptly, consistently and efficiently. Quartz has CRM facilities integrated fully with the rest of the system, which enable all contacts with providers, learners, and other stakeholders to be managed efficiently and effectively.

It is frequently used to support:

- Managing contacts with organisations and individuals, including written correspondence, in an integrated way.
- Analysis of stakeholders to improve targeting of marketing, events and other communications more effectively.
- Staff in managing and prioritising their activities.

Benefits include:

- Better handling of complex queries, by having details of previous responses available so that there is a more complete picture.

- Improved service and continuity by being able to pass queries that cannot be immediately resolved to another member of staff.
- More effective targeted communications aimed at specific individuals, organisations or groups.
- Improving staff efficiency and time management by providing CRM task lists, which allow prioritisation of work.
- More responsive service to stakeholders, for example, through re-allocating queries to other staff if the member of staff responsible is off work or too busy.

CRM Functions

Quartz has core CRM functions integrated seamlessly with the rest of the system. These include two views of interactions with stakeholders: a journal view by organisation or individual stakeholder; and a task-list view specific to each user. Contacts and actions can be recorded in either view.

There are extensive standard and ad-hoc reporting facilities that enable analysis of stakeholder information and can be used to target communications more effectively.

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Journal View

The journal view provides a chronology of contacts and actions with an individual or an organisation. The journal can be accessed directly from a stakeholder record and can be filtered so that, for example, only outstanding actions are displayed. This view is very useful in managing responses to complex queries which require several contacts, and in ensuring phone calls are handled efficiently with immediate access to relevant information.

Task List View

Each currently logged on user has a CRM task-list view, which displays tasks assigned to that individual. The information recorded includes the type of contact, organisation/individual, target date, actions, notes and individual responsible. The view can be filtered, for example, by open tasks, up-coming tasks, overdue tasks, etc., so that work can be prioritised or similar tasks grouped.

Quartz enables tasks or groups of tasks to be assigned to other staff on a temporary or permanent basis, for example to cover absences.

Supporting Business Development

Quartz provides the facilities needed to support marketing events or campaigns, for example, Quartz users can define the steps required in a campaign/event, select the target audience, draft invitations and mail-merge letters, monitor responses, send confirmations, etc.

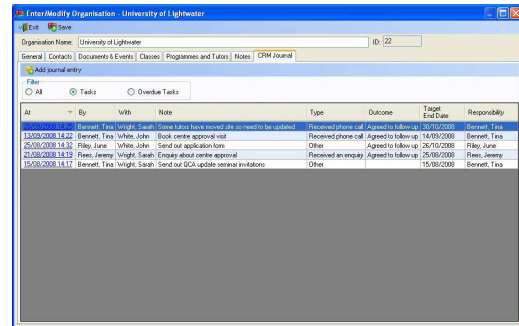
The Quartz CRM tools, in combination with its business intelligence facilities, enable analysis to identify trends and exceptions, for example, to target and develop new business.

CRM Integration

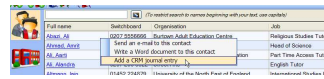
Where an organisation is already committed to a corporate CRM system, Quartz operational facilities can be fully integrated with a 3rd party CRM tool.

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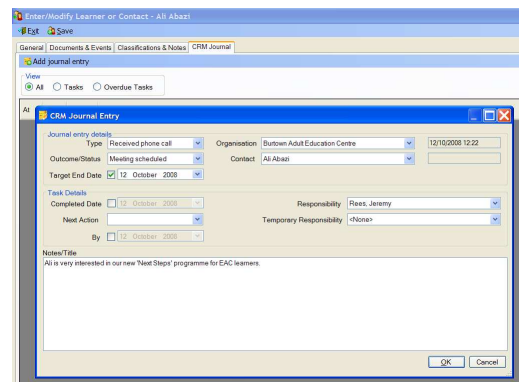
Portico Consulting provides a range of management consultancy and technology services in the public, not for profit, and education sectors. We have extensive experience of supporting the operations of awarding bodies and our systems have managed the achievement records and certification of millions of learners.



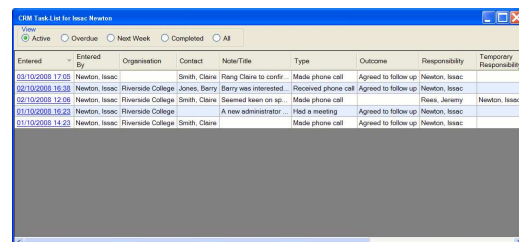
An illustration of the **CRM journal** and CRM tasks for an organisation, illustrating dates and responsibilities.



Quartz's contact management screen gives **instant access to the contact's CRM journal** through a right-click.



Making a journal entry against a contact (in this case, also a task with assigned responsibility).



This illustrates the CRM Task-List for an individual Quartz user displaying all tasks for which .

For more information visit www.quartz-system.com, call and ask for Robert Gale or Matthew Robins, or e-mail mail@quartz-system.com