

# Course Manager

Dynamics 365 CRM  
for Training Providers



# Does your training company face these challenges?

- Are you looking to use your resources more efficiently by reducing administration workloads?
- Do your processes involve repetitive steps, resulting in delays sending delegate communications?
- Is course and booking information easily accessible, or does your team need to check this detail across multiple sources?
- Is data stored in spreadsheets causing governance concerns and security risks to your business?
- Do you still manually compile reports?
- Is your customer satisfaction impacted because of inconsistent training experiences?
- Are you using an unsupported legacy CRM to manage your training data that is not scalable, resulting in high overheads?

## Course Manager could be the answer!

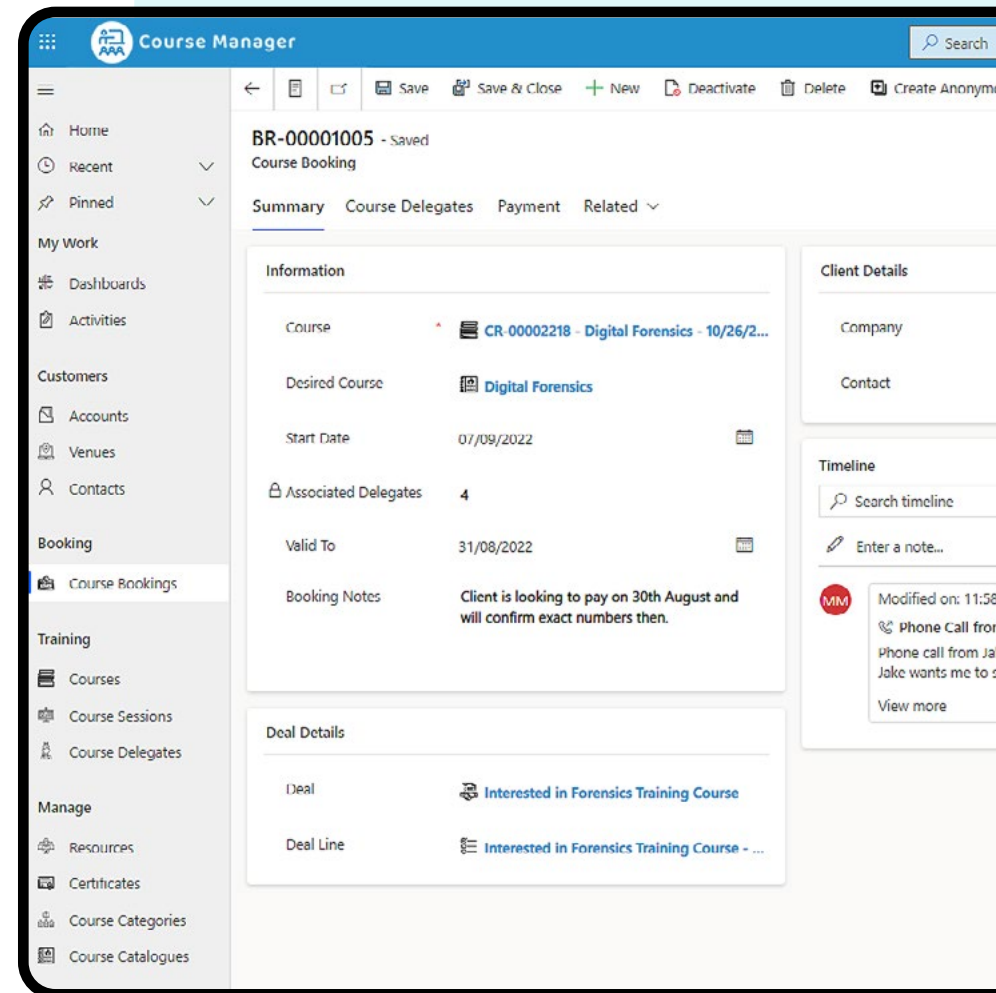
If you are experiencing one or more of these issues, use Course Manager to unify your data, simplify course and booking management, and streamline repetitive activities to improve delegate experiences.

# What is Course Manager?

Course Manager accelerates the deployment of Dynamics 365 by providing pre-configured functionality for training companies.

Switch from legacy spreadsheets and outdated CRM software to a single, secure cloud solution that simplifies customer and course management.

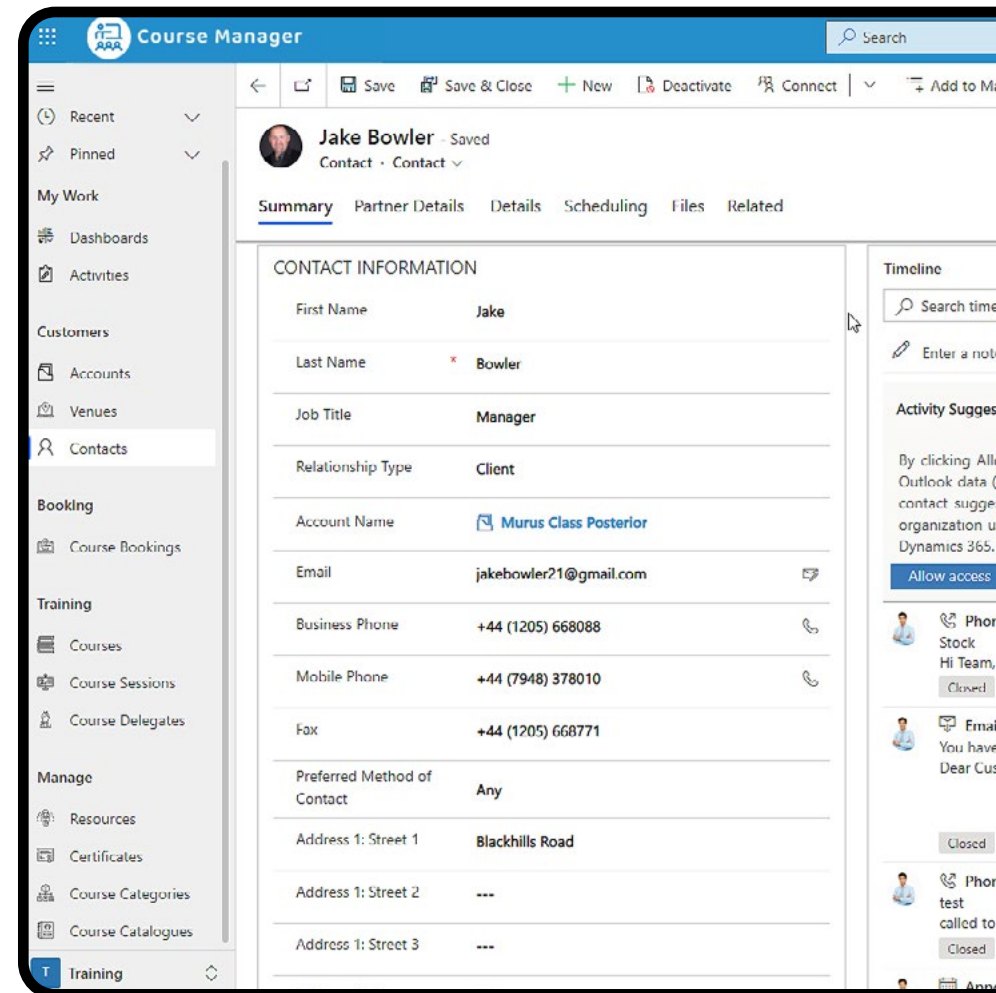
- Built on Microsoft's Power Platform, Course Manager natively works alongside Outlook, Teams, SharePoint and other familiar Microsoft products.
- Gain a single view of your courses, sessions, delegates, venues and bookings in one place.
- Send timely, personalised communications to delegates and trainers.
- Manage provisional bookings and only confirm when payment is received.
- Create and share certifications with delegates, and track expiry dates.
- Connects with Dynamics 365 for out-of-the-box case management and sales automation capabilities.



# Unify course data

Track each repeatable course in a centralised database that is easily accessible to everyone within your business by desktop or mobile device.

- Avoid wasted time spent looking for information by accessing the real-time course and training information in Course Manager.
- Allow sales teams to quickly respond to new enquiries by easily accessing your central course catalogue, delegate capacity, current availability, bookings, and other detail.
- Provide personalised support to your customers and delegates using a clear view of course attendance history, booking statuses, certifications, recent enquiries and other related details.



# Efficient course and resources management

Move faster by replacing time-consuming course administration with automated processes and connected workflows.

- Categorise courses into catalogues that detail course validity, description, prerequisites and other key detail.
- Remove duplicated effort with reusable course templates to quickly create and schedule new events.
- Define multiple sessions for training events in a single step, including the dates, times, venues, rooms and trainers.
- Track the available courses within each category and the capacity remaining to create new bookings.
- Effectively schedule trainers with a view of their skills, qualifications, course history and rates for external trainers.

The screenshot displays the Course Manager interface. The main content area shows the details for course CR-00003907, titled 'Finance For Non-Finance Managers (2 DAYS) - 11/07'. The course is active for 3 months and is in the 'Setup' phase. The interface is divided into several sections:

- Summary:** A table listing key course attributes:

Course Category	Finance
Scheduled Course	Finance For Non-Finance Mana...
Default Account	Second Line Response
Default Venue	---
Default Room/Location	Zoom Call
Default Trainer	Martin Prosser
Delivery Method	---
Currency	Pound Sterling
Budget	£2,500.00
- Details:** A section for course specifications including Capacity, Date From, Duration, and Date To.
- Total Fees:** A section showing the last updated date and a list of fees:

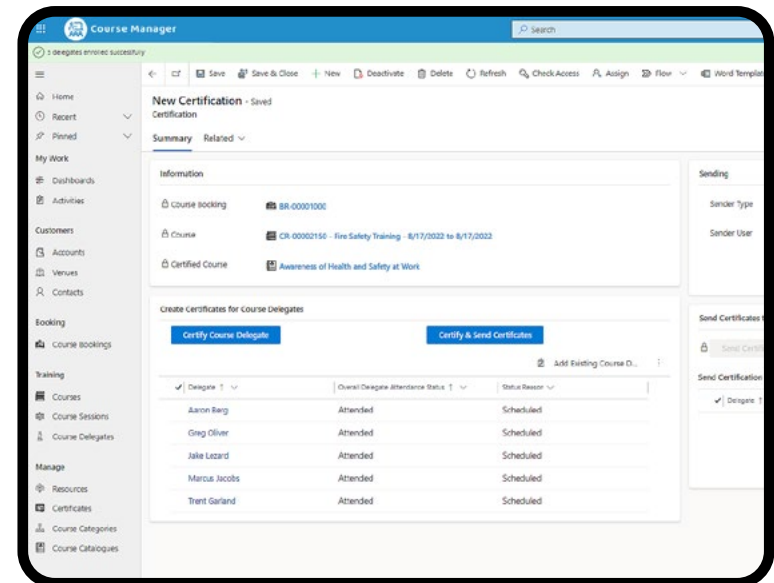
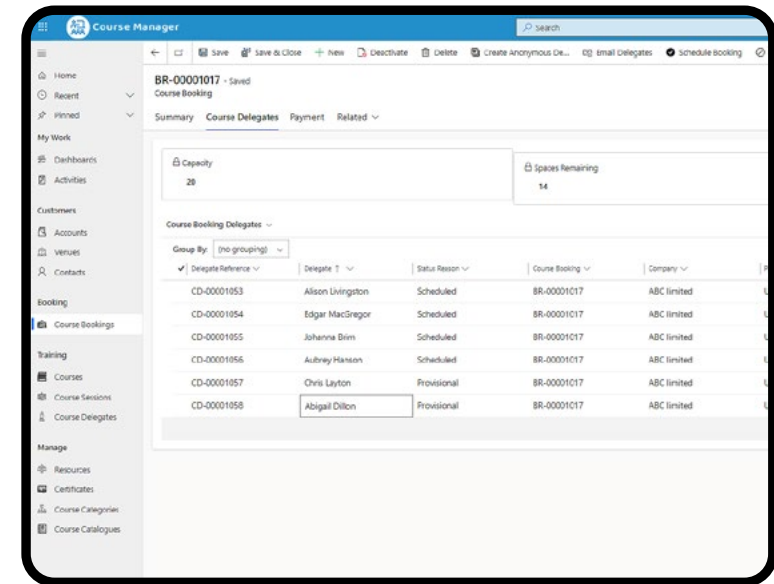
Ca	Catering Food/Bev	£165.00
VH	Venue Hire	£250.00

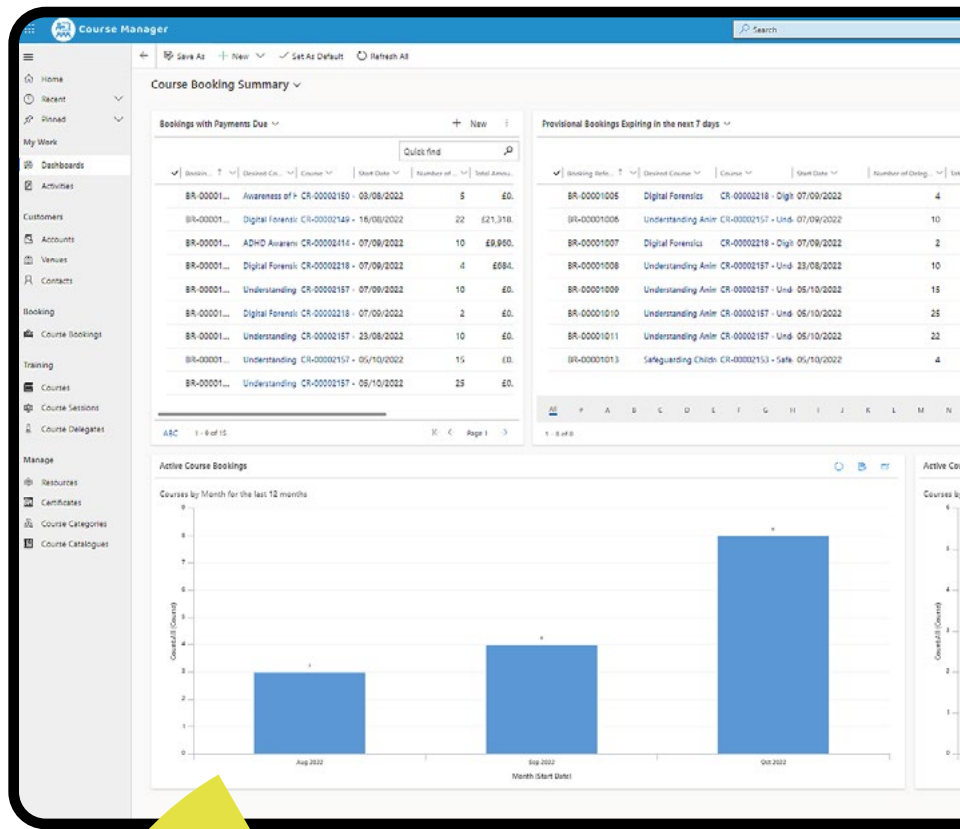
The left-hand navigation menu includes sections for 'My Work', 'Customers', 'Booking', 'Training', and 'Manage', with 'Courses' selected under the Training section.

# Simplify repeatable processes

Ensure consistent delegate experiences by improving processes using out-of-the-box functionality.

- Process bookings for one or more delegates on any scheduled course and set a provisional booking status until these are confirmed or when payment is confirmed.
- Hold provisional bookings for a limited number of days to show accurate availability for each course that will help to maximise booking capacities.
- Avoid delays by sending personalised joining instructions to delegates automatically, or at the click of a button, using an email template of your choice.
- Award post-training certifications to delegates seamlessly upon completion based on their attendance status.
- Request delegate feedback to enhance your processes with actionable insights.





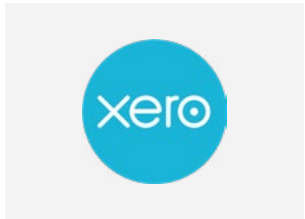
## Drive decision making with real-time insights

Make informed decisions by digitising report processes with real-time dashboards and personalised views.

- View course booking summary, including bookings with payments due, provisional booking status, active course bookings and more and slice and dice this data to gain actionable insights using out-of-the-box Course Manager dashboards.
- Personalised filtered views support on-demand reporting across courses and customers.
- Customise the reports to show the data that's relevant to you and uncover insights to understand how your training resources can be optimised.

# Integrations

Your apps and tools work seamlessly with Course Manager, including Dynamics 365, Power Platform, Office 365, ClickDimensions and others.





## Customer Success Story

# WS Training

WS Training sought a new software as the legacy CRM application used for its course and booking management created a poor user experience, resulting in hours lost completing repetitive tasks and searching for information that impacted its service.

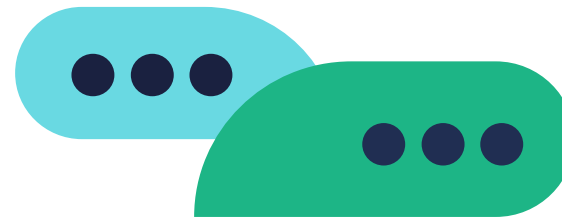
The automation capabilities of Course Manager saved approximately 90% of manual data entry and administration time spent on course bookings.

Course Manager streamlined its processes and increased the responsiveness with quicker access to data, resulting in an improved user experience.

“We’ve made some huge time savings since we started using Course Manager. This includes around 10 hours saved each week in producing joining instructions and invoices.

In a short space of time, we’ve made tremendous progress since deploying Course Manager. The application has been easy to use, and new starters have been able to pick it up very quickly!”

**Joseph Greasley, WS Training**  
**Commercial Course Coordinator**



# Why Course Manager?



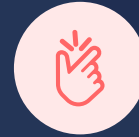
## Minimal set up and configuration

Course Manager is pre-configured with the functionalities you need to immediately get started with Microsoft Dynamics 365.



## Ensures data privacy and security

Protect your data with in-built Microsoft cloud security controls that ensure compliance with global and industry-specific regulatory and privacy requirements.



## Native integration

Course Manager seamlessly integrates with other Microsoft business apps in your environment, including Outlook and Teams.



## Intuitive interface

Built on the Microsoft Power Platform, Course Manager is simple to use with an intuitive interface for all users.

**We help training companies advance their digital transformation using Dynamics 365 and the wider Microsoft cloud platform.**

Let us support you by connecting your data to implement intelligent processes and extract data-driven insights.

## Get in touch.

### Telephone

0800 458 4545

### Web

[www.ans.co.uk](http://www.ans.co.uk)

### Address

ANS Group  
Birley Fields  
Manchester  
M15 5QJ

