

# IRW - Course Management Studio (iCMS)

Based on Sector specific development of Microsoft Dynamics CRM 2011

## Introduction



A complete course management system developed by IRW Systems Limited.

Using templates, courses, terms, modules, classes and assessments can be defined. Academic courses split into terms can be provisioned for an entire year in a single action where thousands of classes can be created with a single record creation. Classes can track student attendance and assessments can record results.

The system also caters for commercial course to be created on an ad hoc basis and sold to business as individual delegate slots. The courses tie in with the product CRM system entity to leverage the inbuilt sales pipeline, track profit and loss against courses, allow the institution to be able to make decisions on whether a course can go ahead or postponed due to numbers attending and integrate with finance systems to recover revenue.

Tight integration with Microsoft Office allows automation of communications with students/delegates via email.

This is an extensible foundation framework for rapid deployment and adoption that can then be modified to meet the individual institution's requirements.

## Course Management Module

- Define all aspects of a course or year;
  - Courses
    - Modules
      - Classes
        - Specific dates can be assigned to classes
        - Specific accommodation can be assigned
      - Assessments
        - Can be exam or coursework submission
        - Other assessment types can be defined and recorded
  - Multiple terms
    - Any number of time periods can be defined, each has its own modules
  - Single Click Provision
    - Create a new "year" and all terms are created, each creating all modules that are delivered in that term and each of those creating its own classes and assessments. Thousands of records created in a single click
  - Document Management Integration
    - Automatic SharePoint integration
      - Against templates to maintain past papers, policy papers, past coursework assignments
      - Against instances of courses/modules/classes/assessments to maintain work set, ad hoc documentation and other work items
  - Extensible template format. The user can define a template field that can be mapped to an instance of a record at any point in the future using a simple naming convention.
- Define Commercial Courses
  - Using the same template driven model as the academic year
  - Instantiate a new course as needed, this creates all modules, classes and assessments
  - Closely linked to Products to leverage the CRM Sales Pipeline
  - Template the costs, alter for each individual course so each delivered course tracks its exact cost.
  - Track delegates as sales offset against course costs to track profit and loss
    - Define break-even points

- Delivers information that can allow a course to be cancelled if it does not reach break-even
- CRM workflows track business KPI and guide commercial decisions
- Sales pipeline has ability to be integrated with finance packages
- Analysis reporting on turnover and profit broken down by course types, dates and funding sources.
- Class Management
  - Manually record attendance at classes or contact sessions.
  - Use an automatic data feed to record entire class attendance.
  - Report attendance at specific classes and by student/delegate
- Enrolment Pipeline
  - Track student enquiries and harness workflow and dialogs to manage the process of enrolment.
  - Automatically enrol students in the course and “call off” places on the course to track demand for places.
- Graduation Management
  - What goes in must come out. Manage the graduation ceremony, track invitations, venue and graduates from within the year.
- Alumni Tracking
  - On graduation the student automatically becomes an Alumni allowing the relationship to be maintained and providing mailing lists for future use.

## Core Records Module

- Student Record System
  - Extend the Contact system entity to record student specific details
  - Maintain a list of qualifications
  - Maintain a list of assessments undertaken and their outcomes
  - Maintains a master list of all matriculated students
  - Maintains both under and post graduate studies
  - On graduation student record automatically becomes alumni
- Finance Module
  - Each student can have their own account
  - Debits and credits can be tracked against each student
  - Ad hoc transactions such as repayments and fines can be tracked
  - Repayment plans can be recorded and monitored
  - Missed payment milestones can be auctioned
- Departmental Record System
  - Maintains list of departments within organisation
  - Using referential hierarchy a record can be a sub-department or larger structure allowing for a complete hierarchy to be modelled
  - Can “own” courses or modules
- Staff Record System
  - Extend the Contact system entity to record staff specific details
  - Maintain a list of qualifications
  - Models departmental hierarchy allowing participation as both reporter and line manager.
- Enrolment Module
  - Allow manual entry of student enquiries
  - Use standard CRM Sales Pipeline functionality to manage the process of student application
  - Use email integration to allow student to confirm enrolment on a course
- Allow for the processing of bulk enquiries through UCAS or other systems
  - Automated routing through line of business workflows
- Integration point to allow web based enquiries to be added to the system and handled as with bulk additions
- Will handle the ability for a student to withdraw from a course, record attained credits and suspend the status of the student

### Example Costs:

Product / Service	Day Rate	Total Cost	Required
<b>Out Of the Box IRW Course Management Studio (Including Installation and Initial Training)*</b>	N / A	<b>£12,000</b>	To be agreed
<b>Microsoft Dynamics CRM 2011 licenses (Can be quoted for)</b>	N / A	To be agreed	To be agreed
System Customisation if/as needed	£650	To be agreed	To be agreed
Advanced user training on site or remotely, via webinars	£650	To be agreed	To be agreed
Data Migration if/as needed, from existing system(s)	£600	To be agreed	To be agreed
<b>Support</b>			
Annual support agreement, with up to 10 incidents (Monday to Friday, 8am -6pm (GMT) cover.)	N / A	£2000	To be agreed
<b>Other Options / modules</b>			
SharePoint Integration – standard module (2 Days)	£600	£1,200	To be agreed
Module Extension/ Customisation if/as needed	£650	N / A	To be agreed
<b>Overall Costs (complete once options are defined and agreed)</b>	<b>GBP</b>	<b>£ _____</b>	
	<b>Euros</b>	<b>€ _____</b>	

*\*Initial basic training and Installation up to a maximum of 3 days, Further days may be required and will be quoted for.*

*Any On-site consultancy may incur travel and expense costs.*

*Prices are plus VAT at the rate applying at the time and per country*

### Payment Terms & Schedule

- 50% of cost to be paid on agreement of project start date;
- Remaining balance to be paid on completion of the project.
- Payment terms are net 30 days and this contract is bound by our terms and conditions. These can be found at:  
<http://www.irw.co.uk/terms--conditions.aspx>
- By accepting this Proposal, you confirm agreement with these terms and conditions.
- Additional days beyond the above required would be at the above project rates.

# Why Microsoft Dynamics CRM?

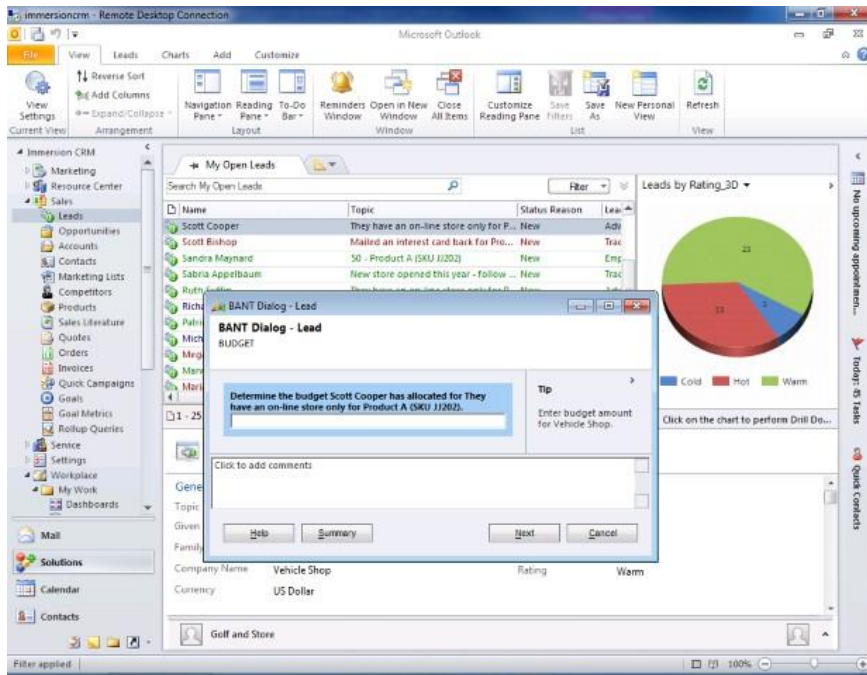
## Creating world-class customer experiences with Microsoft Dynamics CRM

World-class customer experiences begin with your people. When you give them the right tools to boost their productivity and amplify their impact, you equip your organization for success. And that is exactly what Microsoft Dynamics® CRM business software is designed to do.

With over 23,000 customers and more than 1,400,000 users, you know you are in good company with your choice of Microsoft Dynamics CRM.

The top reasons organizations choose Microsoft Dynamics CRM to create world-class customer experiences include the following:

- Leadership
- Value
- Familiarity
- Choice
- Cloud
- Flexibility
- Global
- Insight
- Partners
- Solutions



*“Microsoft Dynamics CRM has been essential to helping us to improve our customer satisfaction levels and to implementing an effective sales management process. Microsoft Dynamics CRM gives us a single version of our customer data, which has helped us reduce customer complaints by 25% and raise customer satisfaction 15%.”*

UMAIR CHAUDHARY  
Chief Operating Officer  
Barclays Bank LP, UAE and Gulf



Boost your productivity with a native Microsoft Outlook experience, guided processes, and inline data visualization in Microsoft Dynamics CRM.

## LEADERSHIP

With a strong balance sheet, consistent growth, a long-term commitment to innovation, and thousands of world-class engineers, you can be secure in your choice of Microsoft. Additionally, Microsoft Dynamics CRM has seen impressive momentum in the CRM market and is recognized as a leader in the CRM industry by many third-party experts and analyst firms:

- Gartner Magic Quadrant for [CRM Customer Service Contact Centers](#)
- Gartner Magic Quadrant for [Sales Force Automation](#)
- The Forrester Wave™ [CRM Suites Customer Service Solutions](#)
- The Forrester Wave™ [CRM Suites for Midsized Organizations](#)
- The Forrester Wave™ [CRM Suites for Large Organizations](#)
- Ovum CRM Decision Matrix

*“We selected Microsoft Dynamics CRM because it has a great reputation in the industry. We especially like the ease-of-use, flexibility, ease of customization and the strong reporting capabilities. We plan to expand our current implementation by three-fold in the coming years.”*

Booz | Allen | Hamilton

CHRISTIAN HOFF  
Senior Associate  
Booz Allen Hamilton

## Value

When considering factors that affect total cost of ownership (TCO)—such as licensing, services, training, deployment, administration, and maintenance—Microsoft Dynamics CRM is regarded by many customers and industry analysts as one of the best values in the industry. Organizations like Mitsubishi-Caterpillar, ISS, VisionShare, and Equinox have won awards for their successful CRM implementations and the value they derived from Microsoft Dynamics CRM. For more information on these customer examples and others, go to <http://crm.dynamics.com>.

## Familiarity

Microsoft Dynamics CRM provides you with a powerful set of CRM capabilities right within the natural and familiar Microsoft® Outlook® client. And with over 500 million Outlook users worldwide, you can be confident that Microsoft Dynamics CRM provides your people with a leading CRM solution that works the way they do.

## Choice

At the end of the day organizations want choice. Microsoft Dynamics CRM offers a choice of on-premises, on-demand, and partner-hosted solutions based on the same architecture and code base so you can select the best model for your organization. Organizations can also access Microsoft Dynamics CRM from Outlook, a web browser, or any Internet-enabled mobile device. Simply put, Microsoft Dynamics CRM offers you choice.

## Cloud

Microsoft has invested over U.S. \$2.3 billion dollars to create a world-class cloud infrastructure. Microsoft Dynamics CRM Online is a full-featured on-demand CRM solution offered at the compelling price of \$44 per user per month and runs in geo-replicated data centers that are SAS 70 and ISO 27001 compliant. And you have peace of mind knowing that Microsoft Dynamics CRM Online is supported by a 99.9% uptime financially backed service level agreement.

## Flexibility

In today's ultra-competitive environment, organizations need the ability to rapidly react to change. With point-and-click customization, role-based forms, declarative design, and powerful developer tools, Microsoft Dynamics CRM can be easily customized to support your changing needs. Extend Microsoft Dynamics CRM beyond customer management to manage other critical relationships with partners, suppliers, contractors, assets, and other key elements.

## Global

Microsoft Dynamics CRM is used by customers globally in over 82 countries, is available in over 41 languages, and provides full multi-currency and multi-language support. Local staff and partners around the world can help make your Microsoft Dynamics CRM implementation world-class no matter where you do business.

## Insight

Microsoft Dynamics CRM provides your users with a range of insightful business intelligence capabilities including real-time dashboards, inline data visualization, flexible reports, and in-depth analytics, so your organization can identify key trends and track key performance metrics. Let Microsoft Dynamics CRM help you turn your data into actionable insight.

## Partners

Thousands of partners in over 82 countries sell, service, and support Microsoft Dynamics CRM. With their unique expertise and skills, these leading partners are a huge asset for your CRM project. Additionally, the introduction of the Microsoft Dynamics Marketplace, a cloud-based repository of partner solutions and community insight, helps you increase the relevancy and value of your Microsoft Dynamics CRM implementation.

## solutions

Microsoft invests over \$9 billion annually in a wide variety of productivity-focused solutions. Microsoft Dynamics CRM incorporates many powerful capabilities from Microsoft Office, Microsoft SharePoint® Server, Microsoft Lync™, Microsoft Dynamics ERP, and other leading solutions so you can maximize your Microsoft investment and increase your productivity.

Get Started Today

Try Microsoft Dynamics CRM today:

<http://crm.dynamics.com>