

## Case Study

# Technology Consulting and Assessment Services Help an International Training Institute Define a Technical Strategy to become a \$300M Organization in 3-5 Years



## Customer Overview

### Customer:

An international training institute that specializes in the safe management of disruptive and assaultive behavior

### Profile:

The institute is helping millions of individuals begin a journey of positive, supportive, and empathic caring for people of all ages since 1980

### Industry:

Professional Training and Coaching

### Services:

Technology Consulting and Assessment

## Business Need

The institute provides content and training solutions for crisis prevention programs. It has several functions and departments that work around the clock to earn revenue from institutional sales as well as from the development of training content and workbooks. These include strategy, finance and accounting, product development, logistics, training, marketing, sales, customer care, HR & administration, legal, and technology services.

The institute's ability to identify/engage with instructors and end learners is an essential part of its strategic growth plan. To drive more content consumption and engage more frequently with each customer, the client needs to create a learning ecosystem that connects trainers and educators in a setting with an optimal learning and collaboration experience.

The training institute was looking to scale geographically, add new products, and drive overall operational efficiencies to achieve these results. It also wanted to expand its market, multiply its product portfolio, and pursue a Direct-to-Consumer channel. But existing systems, business processes, and technology portfolios were insufficient to support this strategy.

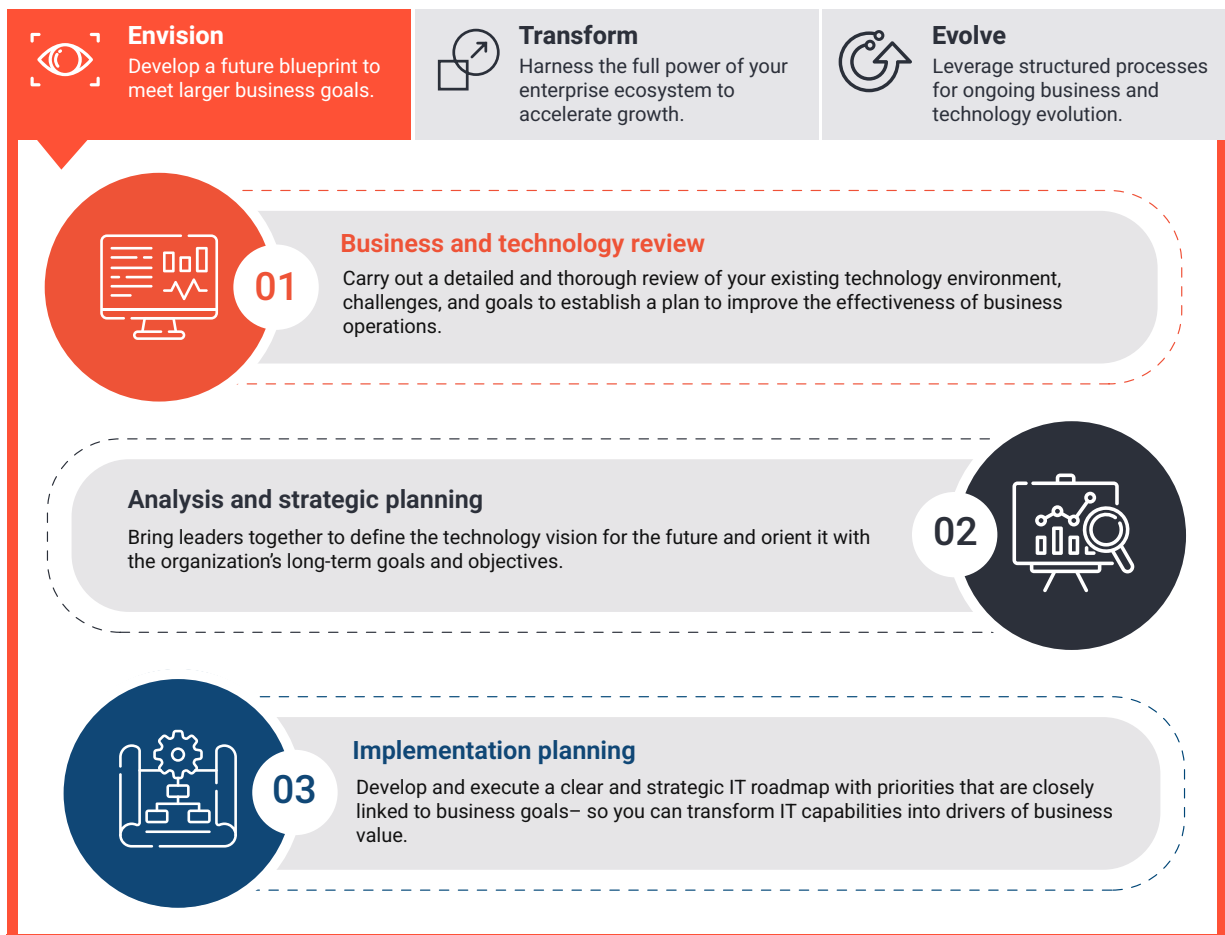
- Legacy applications such as Great Plains were incapable of meeting current and future needs.
- Lack of a robust application strategy led to critical functionality not being leveraged in a scalable manner.
- Missed cross-functional integration opportunities have contributed to departmental, application, and data silos.
- Technology costs were not balanced against employee efficiency when making application choices.
- Many distinct applications support the needs of a single department or a specific function within a department, resulting in unnecessary (or missing) integration, data reconciliation, and reporting gaps.

All these challenges spread IT too thin and led to an overall inability to get operational data promptly. The institute's efforts to grow 3x in a short period required a deep focus on process redesign, organizational change management, and program management in addition to traditional technology implementations. It also needed to simplify its overall technical landscape with fewer tools that are more fully utilized.

To become a \$300M revenue organization in 3-5 years, the institute reached out to Synoptek to get assistance in defining a robust technology strategy and suggestions on recommended courses of action across organizational change management, enterprise governance, and cross-functional process design to meet the institute's strategic objectives.

## Solution and Approach

A business-driven technology strategy is the first step in getting meaningful results from technology investment. Synoptek helped the training institute envision its future business-driven technology strategy using our Envision Transform Evolve 5X model.



We conducted multiple interviews with the training institute over eight weeks to understand key business drivers and pain points and planned strategies to achieve growth goals. We provided comprehensive technical recommendations and organizational change management across several aspects of the business to realize substantial results from technology investments.

### **Business optimization**

- Deploy an ERP platform to create a stable and scalable foundation.
- Streamline customer care by utilizing CRM Service Management.
- Develop a “Common Business Language” that aligns all departments around common definitions, KPIs, and business terms.
- Define a Go-To-Market methodology and architect systems/ interfaces to be governed by a master flow.
- Enable digital delivery of course material to local printers and reduce logistics footprint/ costs.
- Ensure comprehensive system design to track and manage CIs.

### **Customer experience**

- Merge functions from different Excels into a single Portal that serves the needs of CIs, end learners, and corporate partners.
- Use consumer experience technology to identify positive and negative interactions in customer-facing applications to increase NPS.
- Attribute content in product development to enable search of course segments to enable microlearning.
- Leverage mobile technology to streamline event management and utilize Qualtrics to measure CI and end learner satisfaction.

### **Customer growth and retention**

- Implement margin reporting between ERP and CRM to track discounting and price changes.
- Define customer hierarchies and data acquisition programs to gain a full picture of customer penetration and adoption.
- Implement customer and product profitability analysis and pursue a customer segmentation program to drive deeper analysis.
- Leverage key business models as a basis for a direct-to-consumer business model.
- Consolidate marketing functions inside of CRM to enable greater synergy between Marketing and Sales to grow existing customers and open new markets.

### **Operations**

- Define KPIs by department and role that are linked to key business strategies and review and refine them semi-annually.
- Leverage a Common Business Language for the identification of key data attributes, systems integrations, and reports.
- Progress data analytics from operational reporting by emphasizing correlation analysis and forecasting KPIs
- Leverage system alerts for proactive actions.

### **Risk management**

- Ensure system selection, design, and implementation adhere to a common principle for improved data accuracy.
- Utilize a single, integrated timeline for projects and balance the need for immediate results against the risk appetite.
- Implement a company program management/governance function to enable better communication and decision-making and reduce risk.
- Define a shared services strategy for international markets that allows autonomy to grow the market and minimize OpEx spending.

## Business Benefits

Synoptek's business and technology recommendations provide a strong foundation for growth, allowing the training institute to re-imagine processes, technologies, and culture in response to changing business needs, new technology, and internal or external pressures. Our methodology specifically ties business results to technology investments and spend, making technology a business decision, not a technology decision.

By building a strong vision of the initiatives needed to align IT capabilities with business goals, we enabled a clear understanding of the recommended timeframe, sequence, and estimated cost of improvements to evolve the business and remain relevant.

The recommendations, when implemented correctly, will help the training institute:

- Integrate all customer-facing technology into a single portal.
- Attribute all customer touchpoints and interactions with the portal and utilize it for up-selling, cross-selling, and CI retention.
- Leverage usage analytics and customer satisfaction surveys to drive a better understanding of CI effectiveness and learner comprehension.
- Build customizable learning plans with segmented content to enable subscription and direct-to-consumer business models.
- Simplify the current technology portfolio and make greater use of existing applications to serve more departments/ functions.
- Implement a new ERP to enable profitability analysis by Product, Customer, and Geography.
- Align Marketing, Sales, and Customer Care under one platform to focus on expanding reach to more customers.
- Implement automated solutions that integrate departments and shift staff into new roles.
- Define a common business language to ensure departments and geographies agree on results.

## About Synoptek

Synoptek delivers accelerated business results through advisory-led, transformative full-life-cycle systems integration and managed services. We partner with organizations worldwide to help them navigate the ever-changing business and technology landscape, build solid foundations for their business, and achieve their business goals.