Education Management professionals in horticulture use Mobile CRM for training course enrollments & delivery

About Primary ITO

Founded in 1992, Primary ITO is dedicated in providing various different educational programs, trainings to a variety of primary sectors such as, horticulture, agriculture, and nurseries.

Primary ITO monitors the quality of training and assessment, both on and off the job. Primary ITO contracts accredited training providers who deliver courses on their behalf. Maintaining positive relationships with industry partners like DairyNZ, Beef + Lamb New Zealand, the New Zealand Pork Industry Board and the Poultry Industry Association of New Zealand to develop and maintain relevant, up-to-date qualifications that deliver the CAN DO skills the industry needs.

Customer
Primary ITO

Solution
Resco Mobile CRM with Microsoft Dynamics CRM 2013, 2016 On-Premise

Server Connectivity
ADFS

Devices
iPhones

Type
Incorporated

Industry
Education Management

Organization Size
201- 500 employees

Headquarters
Level 2, 180-188 Taranaki Street
Wellington, 6011
New Zealand

Business Challenge

A typical day for Primary ITO in the field consisted of visiting multiple farms, and horticulture/agriculture nurseries to promote educational programs in which customers could enroll to take part in classes to better their overall agricultural experience. Primary ITO offers 200-300 types of courses and having material in paper form is not suitable for a job that is constantly on the road. This cross between sales and mentoring **requires a high level of organization, digitized material, sophisticated presentations, course portfolios, class enrollment bookings** in actual time, **and follow-up information** that could be easily accessed and sent out to various people, whether in or out of the organization.

> *"We're looking for something to give us leverage, mobility as we're constantly on the road, and provide our customers great presentations with valuable information at our fingertips. We used to have to print a lot of material, things would get lost, and we'd even have to go back and forth to ask questions because we didn't have everything in one place,* *"stated Nigel Campbell, Application Manager – Primary ITO.*

A Training Advisor traveling throughout New Zealand daily, carrying sample course material, and contracts is not practical nor productive while being on the road. Papers can get lost, there may be instances where not enough copies are available at the point of meetings, and so on. At the same time, what if, on the spot a customer asks, *"Are there any spots available in this specific course?"* Tallying up what was enrolled that day, or not having a finalized number from previous enrollment bookings, definitely caused delays, uncertainties, and overall disorder.

> *"We needed to be able to look up availability of courses and spaces available. At the same time, sign-up new apprentices straight away, with confirmation on dates," exclaimed Nigel Campbell, Applications Manager – Primary ITO.*

Solution

Primary ITO has always had mobility in their plans. Understanding that technology is changing day-by-day, they decided to team up with mobile specialists, Resco.

> *"Everyone finds CRM pretty daunting, it's complex and visually not appealing. Resco made it easy as pie, appealing to eye, and easy to work with, we love Resco Mobile CRM, the CEO loves it," exclaimed Nigel.*

Primary ITO wanted to suit-up their team and working environment with Apple iPhones, to all be on one platform. Another sought after feature besides mobility for Primary ITO was to be able to customize the app to their liking.

> *"We realized it would have cost far more to go out and get things spike developed and to be honest, it wouldn't even compare. Resco Mobile CRM's customization tool, Woodford, allows us to do in-house*

"Offline capabilities in a Mobile CRM were crucial to Primary ITO, and Resco provides all that and more."

Nigel Campbell,
Applications Manager

customizations with an immediate outlook on what changes have been made. Anything that doesn't suit us, we remove and over time we see there's more to be used and adds a huge benefit to us and our way of working," explained Nigel.

Sought after Features – True Offline

Being on the road in New Zealand does pose some restrictions when it comes to cellular availability. Being able to enroll and add contact information of each student on the spot without having to rely on data networks was an enormous plus in selecting Resco Mobile CRM. Primary ITO has also made full use of map functionality, adding GPS and sophisticated multi-route planning for all those daily cross-country meetings. Direct client calling from within the app to the client was another sought after feature by the Primary ITO team. Taking pictures for collecting evidence and ID information from future apprentices made it easy for database organization and criteria completion in enrollments.

"The offline component is vital to us. We do get poor signal so adding all the information while out in the field cuts down on time expenditures and even missing info if were to have to wait to come back to the office and enter things into the system. Adding photos to each account really resonated. We can see we're leveraging a lot more, even for different areas, projects, and roles," Nigel pointed out.

Benefits

In-house customizations — money saved

Primary ITO had come to Resco with the need of a Mobile CRM via their vendor, a Resco Partner. The implementation process was smooth and effortless, with the company running on Resco Mobile CRM in a matter of hours. However, where cost savings was concerned, customizations done with Resco Mobile CRM were done all in-house by Primary ITO.

"We didn't need our vendor to do anything, we could do all the customizations ourselves. In fact, I was able to do that myself. The team would project their ideas and innovations and I would help in making things appear in reality. Within a few minutes for small changes and anything with more collective feedback took planning, to make sure everything worked as it should," Nigel described in more detail.

Resco Mobile CRM voted best investment

Primary ITO had voted Resco Mobile CRM as the most innovative and best investment made in 2015 for the company.

"The fact that we can do a lot of our work out in the terrain, save time, not having to stop at the side of the road, everything truly mobile, truly offline, an easy user interface to work with, and quick turnarounds, our staff voted it as the best investment made in 2015," Nigel stated.

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Nigel Campbell,
Applications Manager

Resco Support vs ADX Studio

Primary ITO wanted to work with a dedicated support team, have plenty of resources to guide them, show them many tricks of the trade and ultimately be able to start off things independently.

> *"We use ADX Studio which recently got bought by Microsoft, as a portal and trying to get training information is terrible. With Resco, everything is available online, blogs, webinars, guide documentations; unbelievable difference. We're able to jump start things instantly," Nigel revealed.*

Getting help straight from the source helps, when you have truly exhausted all resources and other options. Primary ITO is also familiar with this scenario and quite pleased with Resco's Support Team.

> *"The Resco Support Team really doesn't compare to what's out there these days. I simply emailed them and overnight I had my answer. I made my changes and within a day everything was successfully resolved. Even being out in New Zealand, this never posed a problem to Resco," exclaimed Nigel Campbell, Application Manager – Primary ITO.*

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Nigel Campbell,
Applications Manager

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