



## The Company

WS Training provide commercial training courses for organisations and individuals, including human resources, health & safety, management development, IT and personal development courses.

The company also offers a supported learning programme for people aged 16 to 19. These courses provide young people with an opportunity to develop their skills and knowledge to help them prepare for a move into employment.

## Challenges

- Unsupported CRM application
- Manually updating invoices and joining instructions
- Time-consuming repetitive processing of course bookings
- Delays responding to enquiries because information wasn't easily accessible
- Inefficient reporting – requiring data export to spreadsheets

## Solutions

- Implemented course management Power App built in the Microsoft Cloud
- Automated production of personalised documentation within course booking processes
- Functionality to create multiple course sessions in a single step
- Personalised filtered views to support weekly reporting

## Benefits

- Efficient processing saving approximately 90% manual data entry and administration time spent on course bookings
- Increased responsiveness with quicker access to course and booking information
- Paperless processing
- Time saved running weekly reports
- 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.’

**Joseph Greasley, Commercial Course Co-ordinator - WS Training**

## The Requirement & Solution

Prior to engaging with Preact, WS Training used a SalesLogix CRM application for its course management and booking processes, but this version was no longer supported. The restrictiveness of the system created a poor user experience, resulting in hours lost completing repetitive tasks and searching for information. Routine processes to make bookings, create new courses and run reports had become manual, time-consuming tasks for WS Training that were impacting its service.

The company had reached the limits of its system and it sought new software that would reduce user effort and streamline these processes.

Following a review of WS Training's requirements, Preact proposed its Microsoft Cloud application for training organisations, [Course Manager](#).

**Within a few months of implementing Course Manager, significant progress had been achieved as Joseph Greasley, Commercial Course Co-Ordinator at WS Training explains.**

## The Outcomes

"We've made some huge time savings since we started using Course Manager as this is enabling us to complete our processes more quickly. For example, using SalesLogix, it would take 20-30 minutes to create an invoice and joining instructions for a new order; these documents are now produced in just a couple of minutes which is saving us around 10 hours each week."

Further automation capabilities within Course Manager have replaced repetitive manual data entry, across more of WS Training's processes, as Joe continues, "Some of our courses are delivered over several days, so we need to book each session which includes specifying the venue, room and trainer.

"Previously, this was a tedious process to book each day, but Course Manager allows us to create multiple sessions which can save us around 30 minutes to set-up each course."

By streamlining its processes, Course Manager has also helped WS Training improve its service as Joe explains, "We're able to move around the system very quickly when we're talking to someone. Compared to our previous SalesLogix application, it's much easier to find information when handling enquiries and taking bookings. Being able to look then and there means that we can immediately respond without needing to phone people back.

"The initial process to create a new booking is also faster compared to the convoluted steps we previously followed; this adds up to a further saving of 2-3 hours each week."

**Joseph Greasley, Commercial Course Co-ordinator**  
**WS Training**



**Course Manager has enabled WS Training to digitise more processes and make a step change in its reporting.**

“For our upcoming courses we’d print off course notes, add written comments and then tick off each item. Now, we can access everything we need in the system and mark each point as complete which is a definite improvement,” says Joe.

“How we report on our data has also changed because we’re able to create personalised views, which wasn’t possible in our old system. This is very easy to set up and we can go into our views to check information, pull off a report and adjust filters if needed. By comparison, we’d previously export all data to a spreadsheet and then apply filters, so reporting was another time-consuming process. We run reports each week, so that’s easily saving several hours each time.”

**Summing up, Joe credits the support WS Training has received from its partner.**

“Preact are always available to chat on Teams, or the end of a phone, if there are any issues we need to discuss, and they’ve handled these really well. It’s a positive that we have a dedicated person to speak to, so we don’t ever feel passed from pillar to post.

“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!

“There are more features that we want to use within the current application, and we know Preact will continue to add more capabilities, so we’re looking forward to seeing further benefits.”

**We are grateful to Joe for sharing his experiences of Course Manager. Visit [www.wstraining.co.uk](http://www.wstraining.co.uk) for details about the courses offered by WS Training.**

## How can we help your business?

Discover how [Course Manager](#) from Preact can help your training business transform performance. Please get in touch to learn more.

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