



ENGAGE CRM UK



CASE STUDY



West of England Works



// BUILDING BETTER OPPORTUNITIES

Building Better Opportunities Case Study

At a glance

Starting in 2016 we have been working with Building Bridges and Weston College to deliver a centralised MIS for their projects to organise, process and archive their participant data and evidence.

Features include an automated onboarding process, generating paperwork and bespoke audit reports to ensure the data exported is accurate and compliant with the funding rules.

Key Metrics

 **250+**
Active Users

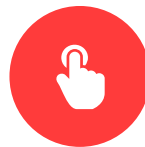
 **5,000+**
Participants Enrolled

 **28%**
Increase in online sign-ups

KEY CHALLENGES FACED

- **Government-funded project with compliance and rules**
- **Multiple organisations with user groups**
- **Generating funding paperwork**
- **Email Notifications and alerts**
- **Audit Reports & Dashboards**

SOME IMPLEMENTED SOLUTIONS



Participant and recording interactions



Generating and archiving funding paperwork




Reminders and Reports for auditing compliance

BENEFITS


- 1 Participant Data Centralised**
All Participant information and evidence stored
- 2 Audit Reports and Compliance**
Specifically designed reporting for highlighting errors and issues
- 3 Generating Paperwork**
Mail merge and generate funding documentation
- 4 Online Enrolments**
Potential candidates can use online forms to sign-up



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What Our Clients say...

EngageCRM UK customised our Participant dashboards for our starts and successful completions!

It is so easy to use and I can see our Participants data trends in a whole new way!

Anna Carey

Partnership Development Manager for West of England Works