



# skillset.



**CUSTOMER:**  
Skillset Ltd



**INDUSTRY:**  
Employment Services,  
Not for Profit



**LOCATION:**  
Bathurst, NSW, Australia



**PRODUCT:**  
Sage 300 ERP and Sage CRM

“Enabling has been very responsive to our needs as a supplier, and also as an entrepreneurial partner. They followed up, and did training in various different countries when the MATE solution was implemented overseas.”

BEN BARDON – CEO FOR SKILLSET

## THE SCENARIO

“We employ apprentices and host them out to business, allocating a field officer who has to implement a supervision plan,” says Ben Bardon, CEO. “We wanted a solution that would track all the file notes and contact details across employers, supervisors and apprenticeships.”

Ten years ago, it became clear that a better solution was needed to support pro-active management of relationships with apprentices and host employers. Skillset needed a solution that would improve processes and levels of service, consolidate data, be easily used and taught to new staff, and support expansion into new workforce development services. Not an easy ask.

## THE REQUIREMENT

As a not for profit organisation that must comply with some complex government reporting requirements, Skillset is always looking for ways to improve its processes and deliver services more efficiently to its clients. One of the fundamental business requirements is to track a wide range of data on employed apprentices and trainees in various sites, as well as details on customers who host the apprentices. It is critical that the system sustains better relationships with employees and hosts, however tracking the data shouldn't become a chore for field staff.

The organisation had numerous remote offices with staff providing a constant flow of case data to the central office, data needed to manage the important processes involved with employing, training and caring for many people as well as relationships with multiple trade clients. With multiple databases, lack of uniformity in business processes, and inaccurate reporting, a change was needed.

“There was an immediate compelling need for a solution,” says CEO Ben Bardon. “We were getting feedback from our business customers that we weren't fulfilling contractual obligations.”

The solution required was very different from most businesses, but with a strong component of relationship management. It was also important to support best practice and make staff training easy.

## THE SOLUTION

For financial management and reporting, Sage 300 ERP was already in use. It made sense to build on this as a solution, if practical.

## ABOUT SKILLSET

Skillset is a not for profit training organisation that employs over 1000 apprentices and places them with businesses throughout the region. This large and diverse organisation began in Bathurst in 1982 as Central West Group Apprentices. It was formed to create new training opportunities and ease the skills shortages affecting the region. Since then, it has grown to become one of Australia's largest Group Training Organisations.

Skillset maintains its original mission, but its role has evolved over the past 30 years. It continues to employ apprentices and trainees and host them out to local businesses.

A presence in East Timor offering internships in tourism and hospitality, and establishing the first Group Training Company in the UK, means that Skillset has expanded far beyond its Bathurst, NSW origins.

Workforce development and productivity as well as sustainable skills have been added to the Skillset range of services, to further support the skills and training of tradespeople in the region.

## ABOUT ENABLING

Enabling is the recognised leader in the provision and support of business management applications throughout Australia and New Zealand, especially in the areas of technical and development expertise, solution design and long-term customer service. With offices in Melbourne, Sydney, Brisbane, Perth Auckland and Wellington, we have both strength in numbers and depth of expertise to support organisations of all sizes and with a multitude of requirements.

## ABOUT SAGE

Sage is a global provider of end-to-end business management solutions covering areas including accounting, supply chain, point of sale, EDI, web store, manufacturing, construction, property management, business intelligence, CRM and hosting services.

The offering meets the unique requirements of mid-market Australian and New Zealand businesses. Sage's solutions cover a wide range of business disciplines to enhance a customer's competitive edge and provide seamless integration across its internationally recognised and award-winning solutions. In addition, these solutions are designed to be comprehensive, scalable and cost-effective, ensuring that as a customer's business grows or needs change, so do the solutions.

## PRODUCT CHOICES

- Sage 300 ERP
- Sage CRM

"Sage 300 ERP was a well-implemented, stable system, that worked well for us," says Bardon. "It was put in place by Enabling. That was a good piece of professional work on software that had a long track record. So we went to Enabling when the need arose." After reviewing requirements, a solution using Sage CRM was suggested, providing a flexible, customisable framework to build Skillset's very special requirements. It made a compelling case.

Sage CRM automates marketing, sales and customer service operations and can be easily customised to meet business requirements. It is a fully featured solution optimised specifically for small and medium businesses and designed for ease of use and quick deployment on-premises or in the cloud.

During implementation the focus was always upon process improvement and ease of use. The aim was to manage risk, maintain a high service standard, and monitor and improve staff performance.

"We went through a process that involved us thinking through our business processes from start to finish and taking the opportunity to create new processes, such as risk management," says Bardon. The CRM solution evolved into a custom solution affectionately known as MATE (Making Apprenticeship and Traineeship Easier) and is constantly enhanced, with a number of similar organisations in Australia and overseas adopting it.

## THE RESULTS

The results speak for themselves in business efficiencies, enabling Skillset to expand and grow in the range and standard of services offered. The Sage CRM solution is highly successful in managing the diverse relationship needs of the organisation.

Skillset now offer a better level of customer service and pro-active management of all apprentices and trainees, not just reacting to those employees with issues. Thanks to automated supervision plans, visits to apprentices and hosts are scheduled upfront in advance, so no one can be missed. Field staff also have easy access to key payroll information, allowing them to efficiently answer queries on the spot.

In processing candidate applications, CRM functionality is used so that web applications from candidates automatically create candidate details in MATE and the relevant branch is notified. This allows for a more efficient candidate management process. A shared database enables various branches to work more closely together and share a pool of candidates.

Communication between departments is easier and more automated. Finance is involved earlier in the credit check process and can approve the credit risk rating before field staff commit to new business with a host. The system enables an efficient risk management system without interrupting the business flow. Health and Safety concerns are managed through notification to the various department and field staff, who can do the risk checking before a new apprentice starts working.

## THE FUTURE

Sage CRM with Sage 300 ERP has proved an effective platform for managing the complex relationships of this organisation, simplifying the processes for staff, opening up communication, information and reporting. With an integrated system the ability to see and check financial data, and only enter it once is a great benefit.

Skillset continues to evolve, supported by Enabling. "We are in a people business," says Bardon. "Often, case workers don't want to write up notes for the files. We keep developing our note capturing processes. We have now rolled out an iPad version so the office can see the notes in real time. And, they can be entered while visiting a client business rather than waiting for return to the office."

"We have a cordial and productive relationship with Enabling," says Bardon. "They would always be our first port of call. We are looking now at how our markets are changing and what we need to do to meet those changes."

AUSTRALIA

1800 362 254  
1800 enabling

NEW ZEALAND

0800 362 254  
0800 enabling