



## ProEngage Implementation at Bridgwater College

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### Background

Bridgwater College, Somerset, has an excellent reputation both regionally and nationally as a highly successful provider of education and training. The College's examination and course results consistently place it among the best of all education and training providers in the South West.

Bridgwater College caters for more than 15,000 full and part-time students and employs more than 1,000 staff. The student population comprises approximately 3,500 16 – 18 year olds, as well as 700 students following higher education programmes.

Bridgwater College is also a leading provider of business training to employers across Somerset and has an excellent track record in providing certificated and bespoke training solutions for the business community.

The College:

- > Is a Learning and Skills Beacon status college
- > Has held an Ofsted outstanding designation for the past 11 years
- > Has received 12 National Beacon Awards in recent years
- > Meets the Matrix Standard for information, advice and guidance services

In 2013 Bridgwater College was awarded two well-respected accolades at the Association of Colleges' (AoC) 2013 Beacon Awards ceremony. The awards saw Bridgwater College achieve first place in the Employer Engagement category for its training partnership with DHL/Morrisons. This partnership started in 2009, to support the recruitment and training for a new regional distribution centre. To recognise this ground-breaking model of employer engagement, the College was also awarded the prestigious President's Award, which is given to the best and most deserving Beacon Award winner of the year.

### Client >

Bridgwater College

### Sector >

Education

### Project >

ProSolution and ProEngage implementation

# ProEngage Implementation at Bridgwater College

## ProEngage Implementation

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The initial purchase of ProEngage was made in January 2014, following an Implementation Training Session (ITS) held in December 2013. The ITS involved a consultant visiting the College and discussing our recommendations for implementation, configuration and getting started with ProEngage. At the ITS, the College was represented by the Head of Business Development, the Business Development Manager, the MIS Manager, a representative from the Finance Department, a representative from the Marketing Department, the IT Manager and representatives from the Business Development Department.

During the ITS it was decided that ProEngage would be populated with organisation/employer data from the existing CRM system and from ProSolution. However, there are no plans to synchronise the organisation data between ProEngage and ProSolution because the quality of the organisation data currently held in ProSolution is unknown. Entering URN (EDRS Ref) codes into ProSolution and ProEngage will allow enrolments and work placements, recorded in ProSolution, to be displayed in ProEngage.

In addition to the main ProEngage Windows application, Bridgwater College also intend to use ProEngage's internal web application to record

employer enquiries and ProEngage's Outlook add-in to quickly add emails and share contacts, meetings and tasks between the systems.

Bridgwater College have also purchased ProEngage's Student Module. This is an optional module available to colleges that use ProSolution, which allows the CRM functionality of ProEngage to be applied to ProSolution's students.

Initial user training was carried out at Bridgwater College in January 2014, to eight member of staff, seven of whom had previously attended the ITS. The additional staff member was one of the Commercial Managers, who works mainly in the curriculum. The initial user training was carried out on the ProEngage evaluation system (installation of the full system had not been completed at that point). The user training covered the day-to-day use of the system including:

- > Adding new organisations
- > Editing organisation data
- > Adding Contacts and Addresses
- > Creating Potential Business (Enquiry) records
- > Creating Bookings
- > Bulk Mailing (marketing emails and letters)

Usually administrator training is recommended to colleges implementing ProEngage. In this case the administrator training was not required because the administration and customisation of ProEngage will be carried out by the same staff who are involved with ProSolution's administration and customisation.

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The next steps for Bridgwater College are to:

- > Install the full ProEngage System including the Web Applications and Outlook add-in
- > Map the current work processes to ProEngage
- > Customise the screens in ProEngage to match their current work processes (i.e. change field labels, hide fields and tabs, create user-defined fields, set up permission groups and users)
- > Import organisation data

## More information

**w** [oneadvanced.com](http://oneadvanced.com)  
**t** +44(0) 8451 605 555  
**e** [hello@oneadvanced.com](mailto:hello@oneadvanced.com)

Ditton Park, Riding Court Road, Datchet, SL3 9LL

Advanced Computer Software Group Limited is a company registered in England and Wales under company number 05965280, whose registered office is Ditton Park, Riding Court Road, Datchet, SL3 9LL. A full list of its trading subsidiaries is available at [www.oneadvanced.com/legal-privacy](http://www.oneadvanced.com/legal-privacy).