

TRAINING OPERATIONS, CONNECTED

Training CRM

One connected workspace for every training relationship.

From first enquiry to learner success.

Training teams are managing too much in too many places

01 Leads live in inboxes and spreadsheets

02 Learner, employer, and trainer context gets fragmented

03 Cohort / Course delivery needs Constant coordination

04 Courses & Learners communication Is not easy to remember

05 Course rescheduling & re-enrolment Tracking is confusing

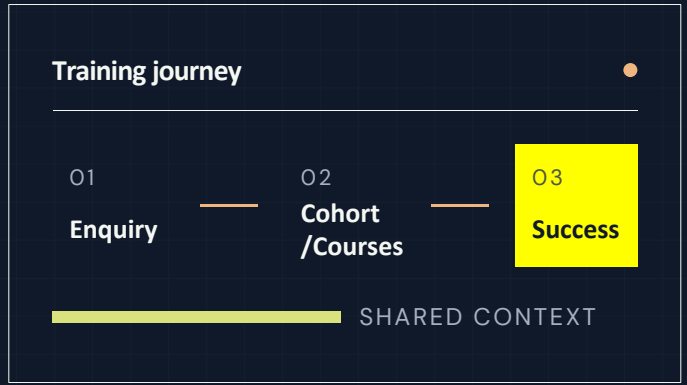
06 Learners tracking is challenge On monthly basis

07 Task assignment to team member For various courses & learners is not easy

08 Reporting takes time away from improving the experience

A CRM built around the training journey

- Capture every enquiry and opportunity in one pipeline
- Connect organisations, learners, programmes, cohorts/courses, and trainers
- Keep every interaction, task, and next step visible through timeline for Every course and every customer
- Move from reactive admin to a auto Process in place – which everyone will follow



Core features that keep the operation moving

01

Lead, Order and account management with clear ownership

02

Learner profiles with history, status, and key dates

03

Programme and cohort / course tracking from enrolment to completion

04

Trainer assignment, tasks, Tickets, and follow-ups

05

Email template customization
Messaging (auto)
Note: if needed, share workflow

06

Training Centre management
Team creation, department
Creation with access

07

Booking categorization
Individual, Group, Company

08

Invoicing with Credit Notes,
And discounting

09

Dashboards for Overall summary,
Occupancy % , Partners, Courses

One shared view. Better training outcomes.

- Respond faster to new opportunities
- Understand customer before every follow-up conversation
- Create a consistent experience across every Cohort / course
- See what needs attention before it becomes a problem
- Scale delivery without scaling administrative overhead

Training CRM turns scattered activity into confident action.

CRM FOR TRAINING COMPANIES

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Thank You!

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