

CASE STUDY NSW INSTITUTE OF TEACHERS

Taming the blackboard jungle

Software normally used to chase sales is being used to track teachers' training, writes **Cynthia Karena**.

CUSTOMER relationship management (CRM) systems are usually a sales tool. But teachers in NSW are using it for a very different purpose: to track and evaluate their professional training.

In a national first, the NSW Institute of Teachers is keeping track of teachers' accreditation and training with Microsoft's CRM system.

"We don't think that anyone has used a CRM system the way we have," says Tom Alegounarias, the institute's chief executive. "For us, it's a membership system enabling us to provide a range of services to teachers.

"In our system we have schools, not companies, and teachers not sales opportunities and contacts. We are maintaining relationships between educational entities rather than tracking sales returns. The flexibility of the system has allowed us to translate the sales language into accreditation language."

The database maintains membership and financial status records such as accreditation decisions, teacher qualifications, fee payments, contact details, employment and training histories.

The institute evaluated six different systems, and chose Microsoft CRM "as it is fairly easy to customise it in-house," says Mr Alegounarias. As part of a \$400,000 system, the institute paid about \$1200 for each licence for about 20 staff. The major cost of the project was the development of a range of portals to provide teachers, schools and administrators with access to the data in the system.

The Electronic Teachers Accreditation Management System was designed and developed with Microsoft-partner Orion in the first half of last year. Migration of teacher accreditation data was completed late last year, and the system was intro-



Tom Alegounarias: CRM used as a "membership system". PICTURE: EDWINA PICKLES

duced in December.

Microsoft CRM is "more of a platform approach, rather than a big monolithic application", says Ross Dembecki, lead product manager of Microsoft Business Solutions in Australia.

"It's not a massive deployment of software that is expensive and difficult to tailor. Most of the application is in the server; you can access (it) from Microsoft Office on a desktop PC or laptop, or from a web browser, or a PDA or mobile phone via micro-browsers."

Before the system, the institute used paper application forms and spreadsheets to manage the process. The paper form is now replaced with a web form that a teacher can fill out online through a teacher's portal on the institute's website, or the institute's administration staff can fill out

or amend details through a portal.

Many processes happen automatically. As soon as a teacher is accredited, the system can automatically send a welcome message and accreditation number.

"Part of the challenge was getting teachers to see that we were providing a range of professional services, so we need to be efficient," says Mr Alegounarias. "We are also trying to meet our own staff's day-to-day needs. Staff members need a system that tracks inquiries and corresponding actions that works for them. That's a big issue for us."

Staff can also generate management reports that show statistics such as how many teachers are accredited by school sector and geographic region. It can also be used for modelling; demographic and geographic profiling can predict how many teachers there are in the state and where they are employed.

"The beauty of the system is that we can add to the tables without difficulty. We are still identifying what our business needs are. We didn't, for example, anticipate the implications of teachers taking leave of absence for accreditation fees, but it was easy to add new information and to adjust the fee structures on the system," Mr Alegounarias says.

"What's been critical to us is the relatively easy integration with Outlook. Teacher emails are immediately put against their record. (Our) staff can easily look and see all previous communications."

In 10 years, the institute will manage the accreditation of around 120,000 teachers, says Mr Alegounarias. "The system can grow as we grow. We expect to be able to track the kinds of professional development teachers undertake and to identify areas of unmet demand."

There is also the potential to link the system into other databases, for example with a national teaching qualification database, or to check people's identification through links to births, deaths and marriages registers.

NEXT LESSONS

- **Problem:** Paper application forms and spreadsheets meant limited options when managing the teacher accreditation process.
- **Process:** Microsoft partner Orion tailored Microsoft's CRM to suit the education environment.
- **Possibilities:** The system can link to other databases — for example, a national teaching qualification database.