

Business Case Study

Work-Based Learning Consortium

CLIENT

Work-Based Learning Consortium

PROJECT

New CRM Application for Non-Profit Organization

TECHNOLOGYTechnology
HubSpot CRM**SERVICES**Customer Relationship
Management**LOCATION**

Kitchener-Waterloo, Ontario

PROJECT DATE

Summer 2021/Fall 2021

CHALLENGE

Work-Based Learning Consortium (WBLC) is a non-profit organization in Kitchener-Waterloo, Ontario. They provide work-based learning programs for entry-to mid-level skilled Advanced Manufacturing jobs that enable unskilled people to get hired, acquire industry-valued skills, achieve industry-recognized certification and pursue rewarding career pathways.

The leadership team of WBLC was looking for a better way to track engagement with customers, employers, partners, and funders also report on employers, placement opportunities, and projects that are part of everyday business development for an organization growing rapidly. They needed a CRM (Customer Relationship Management) system that was cost-effective, easy to use, customizable and accessible by everyone at WBLC from anywhere.

Centricity360 (C360) worked with the WBLC leadership and their business development team to evaluate possible solutions. After the evaluation, WBLC agreed to partner with C360 to implement a HubSpot CRM solution.

SOLUTION

After the initial discovery and the evaluation of the new system, WBLC agreed to partner with C360 to implement a HubSpot CRM solution. HubSpot would not only track their important business development activities and provide the required reporting for funders it would also help them to execute marketing campaigns for brand recognition and lead generation.

C360 configured the new system and customize the entities to meet the unique requirements of WBLC and their business reporting environment. We designed data flows through the system and set up the deal pipeline to track opportunities with prospective employers. Once the setup was completed the C360 team consolidated

several data sources including MS Excel spreadsheets and another CRM containing employee and employer details. The data was reviewed before uploading to the new system to ensure data integrity. After a final review of the system, it was ready to launch.

The new system was launched and there was initial training of the power users of the system.

RESULT

The new HubSpot CRM offered WBLC a robust, cost-effective solution customized to suit their existing business organization as well as track their marketing campaigns. The solution has the features and functionality to meet their current business development requirements and they can grow with the versatile HubSpot suite of products to expand and meet the needs of their future growth plans.

C360 continues to consult with WBLC providing support and training on HubSpot and customizing the system as they grow to suit their unique needs.

TESTIMONIALS



Centricity360 was the right partner for this project. They delivered what they promised and worked over and above the project scope to ensure our organization chose the right solution to meet our needs. They worked with us to complete the project and continue to provide valuable ongoing services to support our HubSpot solution. We appreciate their commitment to fulfilling the project and recommend them to organizations looking for similar project fulfillment.

Rick Stomphorst
Business Development
Work-Based Learning Consortium

ABOUT WORK-BASED LEARNING CONSORTIUM

WBLC is the preeminent organization supporting business and industry firms in meeting their needs for skilled employees by promoting, developing and managing Work-Based Learning programs for entry- to mid-level skilled jobs that enable unskilled people to get hired, acquire industry-valued skills, achieve industry-recognized certification and pursue rewarding career pathways.

ABOUT CENTRICITY360

Centricity360 is a forward-thinking consulting company delivering strategic marketing, business development and related technology services helping business leaders drive revenue growth through innovation and digital transformation.

Centricity360 - Innovative Ideas in Action.