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service. Large firms have used customer relationship management (CRM) and contact management systems for years to manage sales activities, track correspondence, and log contact with current and prospective customers, but these systems are frequently not used by small firms that don't have dedicated marketing departments.

**Brian Tankersley** • Sep. 05, 2014



One of the ways successful firms are continuing to grow during the current economic downturn is by finding new and existing clients with targeted, personalized service.

Large firms have used customer relationship management (CRM) and contact

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E-mail marketing is an attractive way to communicate with clients and prospects, but many small businesses don't know where to start. Newly integrated with Sage Peachtree 2012, Sage ACT! e-Marketing for Peachtree is a tool that helps practitioners create, manage and evaluate the results of e-mail marketing efforts using attractive templates that work with almost any device a customer could use to receive e-mail. When an effective strategy is combined with a customer management tool like Sage ACT! e-Marketing for Peachtree, firms can find new clients and increase the breadth of services to long-term customers. Customers can be grouped based on their needs and interests, and different messages can be communicated based on the firm's approach for each client type.

One of the challenges of traditional e-mail marketing is the lack of basic information about the success or failure of these efforts, including the following:

- How many recipients opened the message?
- Was the message readable in the recipient's e-mail application?
- Which recipients clicked on one of the links in the message?

Sage ACT! e-Marketing for Peachtree uses analytical tools to track each recipient's activities associated with an e-mail message. By using unique links and codes in a message, a firm can know (both individually and in the aggregate) who opened a message, what they clicked on and how that compares to past messages. This feedback makes it possible for firms to know what clients are actually reading from the message, and can be used to make adjustments to the types of information included in future newsletters.

Another challenge for small organizations is making the content appear on the wide range of hardware and software used to read e-mail. A solution should ensure that the message is legible across numerous devices, including mobile phones, tablets, personal computers and laptops. While some users will read the message in

Microsoft Outlook, others will use applications such as Outlook Express, Gmail,

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mandates, which include a requirement that a recipient be able to click on a link to “unsubscribe” from future mailings. Sage ACT! e-Marketing for Peachtree is powered by Swiftpage, a leading e-mail marketing company, and is designed to help businesses comply with relevant laws and regulations.

While many accountants are tempted to simply e-mail a PDF of a printed newsletter to clients, this approach can give younger clients a poor impression of your firm. Given the value the tax and accounting profession places on maintaining the proper image, the information available on who is opening a message and viewing links, the complexities of creating a message that can be read across multiple platforms, and the risks of not complying with relevant laws and regulations, this is not something you will want to do internally. Firms should increase the effectiveness of campaigns and decrease the risks of not complying with relevant laws and regulations by using a comprehensive e-Marketing service such as Sage ACT! e-Marketing for Peachtree for their bulk e-mail communications.

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