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*From the Oct. 2007 Issue*

If you took your homework assignment seriously and are now seeing signs that your internal culture can THINK CRM (June/July 2007 issue; [www.CPATechAdvisor.com/go/1577](http://www.CPATechAdvisor.com/go/1577)), then it's decision time. During THINK CRM, the goal was to mold attitude and actions to focus on Customer Service. Now that everyone is focused, it's time to find the tool that will help you manage those relationships with customers — a system that will enable you to capture, store and analyze customer information.

When you outgrow the CRM-style basic information gathering of Microsoft Office, the question is, "Where to go next?" One easy and cost-effective step up is to move to ACT! by Sage. It was the pioneer of CRM systems when it was launched in 1987, and it has kept up and grown up. Today, ACT! retains its number one ranking with the largest installed client base of any CRM product. The ACT! of old was a Contact Management tool, meaning it was contact-centric with little regard for company. It worked best for single users or small workgroups. If this were a stage play, it would be the last act before intermission. Now, the play resumes and it's a whole new act — Act! 2008. And it's a true contender for filling the "THINK CRM" needs of a broad range of businesses.

### **Manufacturing Company Case Study**

It turned out to be the ideal solution for a southeastern manufacturing company that needed to improve information sharing with almost a dozen remote salespeople.

The reps in the field could only be effective when they had access to current

client information, but they were not very computer savvy. They also weren't

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up-to-date information anytime.

A month after "going live" on ACT!, management had met its objectives to improve customer service. The sales reps were accessing ACT! on a regular basis, and the sales reports were timely enough that everyone could see the big picture. They sold themselves on the value of having access to current information on their customers, and they learned how to sell smarter.

The expectation is that within six months after going live, the manufacturer's sales reps will find ACT! indispensable. That's because a program like ACT!, which is intuitive, will always have a higher adoption rate among users. That assures a successful implementation and a solid foundation for long-term benefits.

### **Investment Banking Company Case Study**

And on the subject of being indispensable, how about having the capability to customize your information gathering to more effectively integrate the unique aspects of your business needs? That's what sold an established investment banking company on implementing ACT! to help strengthen and improve its customer

service delivery. The company's goal was to keep up with many unique facts about the people and families of its exclusive client base. So now, when a client comes through the door at this financial services company, they are likely to be presented with their favorite drink when they sit down for a meeting. It was an easy customization to add the field to ACT! to store the information; it was a big leap in customer service to be able to exceed a client expectation.

### **Marine Supplies Retailer Case Study**

Meeting the specific needs of a client was also the driving factor for a marine supplies retailer who uses ACT! The company knew its customers required different

sales processes depending on if the company was trying to sell a boat or a watercraft.

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Professionals. It includes a series of special tabs dedicated to tracking investment accounts; household information; all family members; advisors such as attorneys, insurance agents or other accountants; estate planning information; and more. The organizational structure is already created so the new user can hit the ground running. One other special feature: It works in a workgroup environment. That means all the people on your team who have a part in the sales and support of your clients can have access to the full set of data stored. You say your industry is Real Estate? There's an ACT! version for it, as well.

### **Third-Party Add-Ons**

As with all software tools, there are some areas of weakness. One example in the new ACT! is the support of marketing campaigns out of the box. In this case, however, a third-party developer has come to the rescue. That's another plus with a product like ACT! With such a large installed client base, more players have written special add-ons. Add-ons and other applications can now more easily link with ACT! since it moved to a Microsoft SQL Database. It works on both SQL Express, the simple self-installing version of SQL 2005, or it works with the full-blown SQL, which includes all of the management tools.

### **Conclusion**

If you are serious about Customer Service and tracking information so you can automate processes, you ought to take a serious look at ACT! Its choice of versions allows you to scale from single-user to small workgroups of 30 or less, up to large and spread out workforces with remote access and complex reporting needs. It is a lot to consider as you THINK CRM, but you can be on center stage with your clients' applause if you ACT!

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