

## Top Ten Reasons to Implement an ACT! Contact Management Solution

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Every Business Owner and Sales Manager is busy. Sometimes too busy to recognize what contact management software like ACT! can do for their business. Contact management software continues to offer easier and better ways for companies to efficiently generate more sales. However, without a customized integrated solution, even companies that already own ACT! don't often realize its full potential. We find that most companies that use ACT! software only utilize 10% of its capabilities, and fail to extract the maximum benefit from their investment.

### An Overview of ACT! Software

ACT!, and the concept of contact management software, has been around for over 15 years, yet it is still amazing how many companies do not have software in place to help them manage their sales and marketing activities.

ACT! is the #1 best-selling contact management solution and has become the industry standard. Mention ACT! to any salesperson and chances are they have used it at some point in their career.

### Top 10 Reasons Companies Implement ACT! Software

**1. Manage all Customer and Prospect information in a single location.** Track all communications between your organization and your customers and prospects. All conversations, sent emails, letters sent, etc. get stored with the contacts in ACT! and are shared across the organization.

**2. A system to quickly monitor all potential deals, open quotes, and the current stage in the sales process.** The ability to track open deals is part of the Sales Opportunities section of ACT!, and often brings the biggest return on investment to an organization. Imagine the ability to instantly review all open deals, what stage they are at, when they are forecasted to close, and what dollars are tied to each sale. With this information, companies are able to be proactive and make decisions and adjustments based on what is going to happen in the coming months rather than what happened last month.

**3. Tool to keep salespeople organized.** A simple tool that allows them to track conversations, schedule appointments and follow-up calls. No more dropped balls on opportunities. Salespeople note each conversation and schedule the appropriate follow-up so that every opportunity is appropriately pursued.

**4. Coordinate sales activities across the organization.** Import leads into your database and setup a process to follow-up on these leads and bring them into your sales process. Without a tool like ACT!, it is difficult and almost impossible to coordinate and monitor a sales campaign.

**5. Limit exposure when a salesperson should leave.** All communications are recorded and stored within ACT!. ACT! becomes an insurance policy for your sales data. When a salesperson leaves your organization or moves into a different position, the next salesperson can continue the process right where it was left off. Without a tool like ACT!, the salesperson may take all of that information with them.

**6. Reduce the time it takes your sales staff to generate status reports.** If you require regular status reports from your sales staff now, it can be a time consuming and piecemeal process for your sales team. They will typically take some time at the end of the week and try to remember what happened. With ACT!, the data is already in the database, and status reports are built in – all you need to do is run the reports. Many companies save an hour a week per salesperson, which adds up to a tremendous time savings over time.

**7. Create Key Performance Indicators within the sales process and monitor and measure your sales efforts.** Every company has activities that directly affect sales. Those activities are often called KPI's (Key

Performance Indicators). It's critical to monitor those activities on a weekly and monthly basis. ACT! gives you the ability to create your KPI's in the system, and then track and measure results on a regular basis. For example, if your sales are affected directly by the number of presentations your sales force delivers, with ACT! you can tag events as presentations and then run reports to monitor how many presentations are being delivered each month, and by what salespeople.

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4. Coordinate sales activities across the organization.
5. Limit exposure when a salesperson should leave.
6. Reduce the time it takes your sales staff to generate status reports.
7. Create Key Performance Indicators within the sales process and monitor and measure your sales efforts.
8. Send out monthly email newsletters or regular updates, with data showing who opened them and what was clicked on.
9. Provide remote and disconnected access to the data for salespeople that are remote and on the road.
10. Quickly communicate using a library of standard email and letter templates that can be shared throughout the organization.

**8. Send out monthly email updates or newsletters, and report on who opened them and what was clicked on.** The email marketing tools that integrate with ACT! have added a whole new dimension to keeping in touch with your customer and prospect base. Email Newsletter templates can be built and you can send the email campaign right from ACT!. After the campaign has been sent, you can track who opened the email and what they clicked on. From those emails you are able to up-sell and cross-sell your products; All for a fraction of the price of direct mail. If you are not touching your existing customers with a monthly email piece, you are missing out on a powerful customer retention and sales strategy.

**9. Provide remote and disconnected access to the data for salespeople that are remote and on the road.** For salesforces that have road-warriors or remote users, ACT! allows those users to be fully functional away from the office. From having ACT! on a laptop and synchronizing, to accessing it through the web, to using a PDA device to access your calendar and contact information, all of the options for remote and disconnected access are covered.

**10. Quickly communicate using a library of standard email and letter templates that can be shared throughout the organization.** ACT! gives you the ability to create stan-

dard email and letter templates for your salesforce to use. The templates make it quick and easy to send professional correspondence to customers and prospects, and it lets the organization standardize the message and the look and feel of the document.

## The Key to a Successful Implementation - Help from Effective Solutions

Anyone can go to their local Office Supply store and buy ACT! software off the shelf, bring it back to the office and install it on a computer. But the key to the implementation is the creation of a custom system that integrates tightly with your existing sales and marketing processes.

That is where Effective Solutions becomes your vital partner. Our whole existence, our reason for being, is to help companies "hit the ground running" with an implementation of ACT!. It is all we do, and you will commonly hear me use the phrase "All ACT!, all the time". That sums up our focus!.

Think of us as Sales Consultants that specialize in ACT! software implementations. The key to our success is our ability to bring together expertise in business, IT and sales to create solutions through tightly integrated ACT! implementations. We have built a process and methodology we use for each implementation.

We have a long history of success stories, which is constantly growing. Our clients include Hitachi, The Milwaukee Art Museum, Vazcom Communications and Capital Electric, to name just a few. In addition to these local companies, Internet based remote control software is allowing us to service customers nationwide. By the end of 2006 we will have several national implementations of ACT!.

The solutions we deliver are not just implemented, but used, and become critical to the success of our customers.

**EFFECTIVE SOLUTIONS** IS A BROOKFIELD-BASED TEAM OF ACT! CERTIFIED CONSULTANTS AND TRAINERS. WE ARE IN THE BUSINESS OF CREATING SELLING AND MARKETING SYSTEMS USING THE ACT! SOFTWARE PLATFORM. WE DESIGN, IMPLEMENT, TRAIN AND SUPPORT ACT! SYSTEMS THAT ALLOW OUR CLIENTS TO IMPROVE THEIR TOP LINE BY GENERATING MORE SALES. GIVE US A CALL IF YOU ARE INTERESTED IN FINDING OUT MORE ABOUT HOW ACT! CAN HELP YOUR COMPANY. YOU MAY QUALIFY FOR A FREE 1-HOUR CONSULTATION.



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