

How to Grow your Business with Contact and Customer Management Software



ACT!

ACT!

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Introduction

If you are like most businesspeople, maintaining and growing relationships with customers, prospects, vendors and partners – and managing all of the details associated with those business-critical relationships – are key elements of your job. Throughout the course of a typical day, you communicate with any number of business associates. Establishing, building and managing those relationships are vital to your business success. Contact and customer management software is an indispensable tool for business owners, sales professionals, sales teams and workgroups. Effective contact management helps you turn information into results and create long-term business relationships that can positively impact your bottom line.

In this document, you'll learn about contact and customer management software in detail, including an in-depth look at the market-leading software: ACT!® from Sage Software. You'll also learn the differences between contact and customer management software and other technology solutions including Personal Information Managers (PIMs), such as Microsoft® Outlook®, as well as more comprehensive Customer Relationship Management (CRM) solutions.

What Is Contact and Customer Management?

Contact and customer management is the management of all the tasks and information related to developing and maintaining relationships with the people, groups and companies with whom you do business. Managing relationships through a dedicated tool can help you transform contacts into customers and turn first-time customers into lifelong customers as part of your successful, long-term strategy.

It involves a variety of activities, including the ability to:

- *Manage all the details related to your contacts, such as addresses, phone numbers, e-mail, Web sites, notes, correspondence, documents, to-do items and activities*
- *Communicate and effectively follow-up with your contacts by telephone, mail and e-mail*
- *Send personalized correspondence to your contacts*
- *Schedule appointments and to-do items*
- *Maintain accurate records of all your interactions with contacts*
- *Generate reports for reviewing activities*
- *Forecast and track sales opportunities to improve results*

Contact and customer management software improves the processes of building and maintaining business relationships, freeing up your valuable time, enhancing your professional image and building sales. Time that might be spent on routine tasks can be directed to more profitable endeavors such as interacting with business contacts in a consistent and organized manner.

Contact and customer management software includes:

- *Ready-to use, easy-to-customize contact and customer database(s)*
- *The ability to quickly search through records*
- *An integrated calendar that links to contact and company records*
- *Mail merge and e-mail merge capabilities*
- *Time-stamped notes*
- *Automatically generated history*
- *Standard and easy-to-customize reports*

- *Sales tracking and forecasting tools*
- *Product links to popular handheld devices, such as Palm™ and Pocket PC*
- *Integration with other leading software applications*

Built on the foundation of a contact-centered database, contact and customer management software provides comprehensive tracking and instant access to all information related to contacts.

Who Benefits from Contact and Customer Management Software?

Contact and customer management software is designed specifically for relationship-driven professionals and has long been a secret weapon of successful salespeople. However, any individual, workgroup or corporate team that needs to improve professional relationships can benefit significantly from contact and customer management.

Here are a few examples:

- **Business owners** and managers can keep track of customers, vendors and business associates.
- **Consultants** can manage clients and prospects.
- **Real estate agents** can more effectively penetrate their territories by maintaining relationships with sellers, buyers, property owners and other agents.
- **Public relations** and **advertising professionals** can manage clients, media, writers, printers and graphic artists.
- **Recruiters** can track job candidates and clients to match people and companies faster and more efficiently.
- **Seminar** and **training professionals** can manage interactions with instructors, promoters, attendees, facility managers and equipment suppliers.
- **Manufacturers' representatives** can track transactions and interactions with manufacturers and customers.
- **Banking, financial professionals** and **brokers** can maintain contacts with clients, build financial strategies and communicate with financial product providers.
- **Workgroups** or **teams** in every business can effectively capture, access and share information about contacts and customers.

How Contact and Customer Management Differs from Other Solutions

A wide variety of products are available to help businesspeople deal with contacts and the details related to those relationships – from paper-based calendars and phone lists to handheld devices to software. At the high end is CRM; at the other end are PIMs such as Microsoft Outlook.

Personal Information Managers (PIMs)

PIMs typically provide only a fraction of the relationship management capabilities of contact and customer management software. While contact and customer management tightly integrates all the information related to your contacts, a PIM typically includes only a basic address book, calendar and to-do list in this regard. Further, PIM components often are not integrated. For example, in a PIM you might have to reference your calendar, and then separately reference your contact list for details about the person you're meeting.

Contact and customer management allows you to access comprehensive information about your contact relationship in multiple, integrated ways, so you don't have to jump from module to module to plan your day or

your sales strategies. PIMs often mimic paper-based address books, calendars and to-do lists. In addition to the lack of integration between modules, PIM contact tracking and searching functionality is relatively rudimentary. For example, in a PIM there is limited, if any, capability to attach notes to contacts, and a history of the relationship is not automatically guaranteed.

PIMs may be suitable for people who only need to store contacts and schedule basic appointments and to-do items. But relationship-driven business professionals and teams seeking a means to capture, track, instantly access and manage every contact detail and plan sales strategies, are much better served by contact and customer management.

PIMs and communication solutions, such as Microsoft Outlook, are designed primarily to help users organize basic personal computing information.

A major difference between Outlook and contact and customer management software is that Outlook is internally focused – facilitating the sharing of information and communications within an organization – while contact and customer management facilitates the building and maintenance of relationships with people inside and outside an organization. Outlook focuses on maintaining the user's personal information, and only basic information about the user's contacts. Further, standard Outlook doesn't include linked contact notes, history documents, quick "lookups," etc.

Contact and customer management is built on a contact-centered database and is intuitively designed for the day-to-day management of all contact information in an individual, workgroup or corporate team environment. Ideally, a contact and customer manager should provide tight integration with Outlook, allowing users to collaborate and communicate seamlessly and effectively with internal teams and build and maintain relationships around their contacts.

Customer Relationship Management (CRM)

Like contact and customer management, high-end enterprise CRM solutions, such as SalesLogix® from Sage Software, help businesses build and manage customer relationships. There are, however, several major differences. Among them, CRM solutions:

- *Are "account-centric" instead of "contact-centric," with a focus on organizations vs. people*
- *Are top-down solutions with advanced customization and integration*
- *Offer sophisticated, integrated marketing and support modules*
- *Are usually more expensive than contact and customer management*
- *Are often more complex to implement and use*
- *May require IT deployment and oversight*

CRM solutions are software suites that, in addition to providing contact and customer management capabilities, offer integration of marketing and support functions. As a result, target customers are typically larger organizations with more complex needs including automating multi-faceted business processes. Due to the differences in complexity and functionality, contact and customer management solutions are less expensive and typically faster and easier to implement than CRM solutions.

Overview of ACT!

ACT! is the best-selling contact and customer management solution – with more than 87% market share in the U.S. – and has been ever since the first version debuted and created the category seventeen years ago. Today, ACT! is relied upon by millions worldwide as their contact and customer communications “hub,” providing up-to-the-minute information about their business relationships and sales opportunities instantly.

Customers spend less time tracking and looking for details and more time building relationships. Here’s a detailed overview of the benefits you will experience by making ACT! the center of your contact and customer hub.

Instant Access to Contact and Customer Information in One Place

ACT! stores complete information and provides instant access to all your contact and customer details. In addition to tracking standard information, such as name, company, phone numbers, addresses, e-mail addresses and Web sites, ACT! provides more than 60 standard fields which can be easily customized. ACT! also allows you to enter virtually unlimited, date- and time-stamped notes for each contact, complete with formatting to add emphasis where needed. ACT! also includes Company records which give you an “account view” of all your relationships and interactions with an organization.

If you’re switching to ACT! from another solution, importing data is easy using the Import Wizard. As you deal with contacts and companies – sending e-mail and correspondence, scheduling and completing activities, etc. – ACT! automatically generates a history for you, so you’ll always be on top of the relationship details. And important documents related to your contacts, such as letters, contracts, presentations, Web pages, etc., are linked and instantly accessible. Simply click to launch attachments in native applications or access Web pages.

When a customer calls, use the ACT! Lookup or Keyword Search feature to instantly locate all the details about your relationship. You can even perform numeric lookups using ranges such as greater than or less than to find contacts sharing common criteria. ACT! remembers the last five Lookups you’ve performed on any field, saving you valuable time. Lookups can also be saved as Groups. For example, you can create sales territories quickly and easily by simply performing a Lookup on the State field, and then saving it.

The intuitive, dynamic workflow design of ACT! makes it effortless for you to quickly capture and organize valuable customer information. With ACT!, you have a system for gathering and instantly accessing key details that can boost your business relationships and improve customer satisfaction.

Easy Customization to Work the Way You Do

Unlike many products that make you switch your way of doing things, you can tailor ACT! to match the way you conduct business. In addition to customizing field labels and types, you can also customize screen layouts to create the look and feel you want, ranging from simply adding your corporate logo to the

“ACT! powers the sales process and marketing tracking efficiencies we have needed to grow a successful direct marketing business. Ease of use, ability to customize, and integration with key applications make ACT! a mainstay at AmazingMail.”

– Stephen Barrón, Director of Business Development, AmazingMail

background of all views, to custom tailoring every view. Field drop-down lists are easily customized with standard entries for consistent, fast and accurate data entry. Field types can also be designated as Yes/No fields, unlimited memo fields and picture fields, so you can store the kind of information you need, in a consistent manner. You can also customize how you navigate through the application by modifying the navigation bar and menus for maximum efficiency.

Staying on Top of Your Schedule and To-Do Items

With ACT!, you can quickly and easily schedule calls, meetings and to-do items; and then view and print your schedule by day, week, work week, month or multiple months. Even recurring events can be scheduled in one easy step. With ACT!, you can set alarms to be reminded of important events. Using the Task List view, you can filter your calls, meetings and to-do items by priority, date range or user, even displaying totals for each activity type. At the end of the day, you can roll over incomplete activities to the next day.

Scheduling activities, individually or for your workgroup, is a breeze. For workgroups, ACT! displays the availability of your team at a glance, including private activities which simply display as “busy.” When you schedule an activity with another user in your database, a notification appears on each team member’s status bar. Users can accept or decline participation. And, if you’re part of a team that uses Outlook, ACT! has tight integration that makes it easy to update your Outlook calendar with ACT! activities.

“With ACT!, we can better target potential clients, stay in touch, and track their progress.”

– Larry Schottenstein, President,
Buyer’s Agent Real Estate

And there are many ways to take ACT! on the go. ACT! prints to 20 calendar formats including Day-Timer® and Day Runner®. And, ACT! provides easy synchronization capabilities between ACT!, Palm OS® and Pocket PC handhelds.

Creating and Sending Personalized Letters and E-mail

Use the ACT! Word Processor with built-in spell-checker, or use Microsoft Word to create quick and easy personalized correspondence, including mail merge letters, e-mail, envelopes and mailing labels. ACT! includes standard templates for standard documents, making personalized follow-up easier than ever. ACT! links all of your correspondence to the associated contact for a complete record of everything that has been sent and received. For professional e-mail marketing, ACT! includes customizable HTML templates. There’s also an e-mail client that works with Microsoft Outlook, Outlook Express, Internet Mail and Eudora.

Meeting Your Sales Goals

Managing your sales pipeline and a sales team strategy is easy using the built-in ACT! sales opportunity tracking and forecasting tools. You can view all opportunities at once, and then filter by estimated close date, sales stage, amount, probability of close, etc. Generating instant customized quotes from any application – without re-keying data – is also quick and easy. Choose from many built-in sales reports, or create your own. Analyzing your sales pipeline couldn’t be easier – ACT! even has an interactive graphical Sales Pipeline Report which allows you to drill down to see details.

Reporting

ACT! includes many standard reports such as phone lists, activity reports, and sales reports, or you can easily customize reports to summarize and analyze your contact data any way you like. Reports can also be exported to Microsoft Excel, HTML, PDF, e-mail and more.

Integration with Other Products

Microsoft Outlook

ACT! provides integration of its extensive contact management features with Outlook. ACT! imports contacts directly from Outlook, so there's no need to re-enter your contact information. ACT! integrates with your Outlook calendar, so you can view activities scheduled in Outlook from ACT! and vice versa. ACT! also integrates with Outlook e-mail so you can access your Outlook Inbox and other folders from within ACT! to track e-mail sent and received for every ACT! contact. You can also use your ACT! database as an address book to send e-mail from Outlook to ACT! contacts, create history for those messages and attach received mail in Outlook to any ACT! contact, so you have a complete record of your interactions instantly accessible, in one place.

Synchronize with Palm OS and Pocket PC Handhelds

ACT! easily imports Palm Desktop information including Address Book, Date Book and To-do items. Once data is in ACT!, you can send your ACT! calendar, contact and to-do information along with notes and history items to Palm OS and Pocket PC handheld devices for instant access to key information while you are on the road.

ACT! integrates with popular software

To unite your front office and back office solutions, ACT! Link software is available to integrate ACT! with popular accounting software such as Peachtree® from Sage Software. This integration gives you an “accounting view” of your contacts from within ACT!, including invoices, credit information, order information and more. This integration also eliminates wasteful duplicate data entry between systems. Additionally, ACT! integrates with Microsoft® Office 2002, 2003 and 2007 to further reduce data entry.

A Company You Can Trust

ACT! 2010 is offered by Sage Software. For nearly 30 years, Sage Software has led the way in developing and supporting automated business management solutions. With a wide range of front office and back office solutions – including accounting, human resources, payroll, fixed asset management, contact and customer management, customer relationship management and e-commerce software – Sage Software offers award-winning products and services that have revolutionized the way small and medium-sized companies do business. So you can rely on outstanding service and a commitment to providing your business with the technology it needs to succeed, today and into the future.

“My sales went from \$30,000 to \$220,000 in my first two years, and ACT! certainly contributed to that. The whole team has consistently increased sales every year. ACT! makes us more disciplined, which we have embraced because it's a lot easier for us to make money!”

– Sean Owens, Charlotte Knights Baseball Club,
Director of Group Sales & Ticket Operations

ACT! Third-Party Partners: Add-on Products, Certified Consultants and Trainers

Testimonial evidence of how ACT! can successfully impact a business's results can be found in many forms, such as: more than 700 ACT! Certified Consultants; dozens of ACT! Add-On Partners; worldwide user groups, and legions of self-described ACT! "fanatics". The accumulation of more than 25 awards in the past five years is further proof that ACT! is easy and intuitive to use.

Grow Your Business with ACT!

For nearly 20 years, ACT! has been the leading product for managing contacts and customers for individuals, small and medium-sized businesses, workgroups and corporate teams. Its practicality and ease of use made it an immediate hit. And now, ACT! is used by millions worldwide.

To discover how ACT! can help your business grow, call 602-903-6527 , or visit nextcrm.net, where you can purchase your own copy of ACT!, or download a free 30-day trial.

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