

ACT!

by Sage



Rate Your Need for a Contact &
Customer Management Solution

sage
software

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Introduction

Business is booming. You're in cycle with an impressive number of customers and prospects, and you manage to keep them all quite happy. But, what if you could achieve even greater success without working harder? Even better, what if you could achieve more by actually working less?

It requires a lot of effort to manage clients via a mix of e-mails, contact info, documents, spreadsheets, and notes. It's time-consuming and sometimes confusing. You strain to remember things that happened weeks ago. You're forced to gather a bunch of separate documents and handwritten notes or gather information from people on your team every time you head out the door to meet with customers.

How much time and effort would you save if you could keep all of your customer information in one easy-to-access place? Would that enable you to spend more time actually doing business and less time managing it?

Many software vendors claim to possess the key to enabling this possibility. You've heard plenty of buzz about CRM, contact and customer management, and other software solutions. But, how do you know the differences between offerings? Most importantly, how can you be sure that software can solve your business management challenges in the first place?

Time to Re-evaluate Your Day-to-Day Processes

In reading this document, you'll be able to determine if there is a better way of managing your contacts and customers and performing day-to-day business tasks. Particularly, you'll discover if a contact and customer management solution is the remedy to some of the organizational and information retrieval headaches you currently suffer.

This paper asks you to consider seven questions. Answering yes to even one of them means that you will benefit from transitioning to a contact and customer management solution. Especially if you're currently using a personal information manager (PIM), such as Microsoft® Outlook® or a Palm® device in conjunction with paper-based records like spreadsheets and written notes, you'll discover how contact and customer management will make it easier for you to excel at your job and create a more successful business.

Definition of Terms

Before determining whether your business will benefit from contact and customer management, it's critical to understand what that term really means. You'll also need to know the difference between a contact and customer manager and a PIM because you may be using that type of solution today without knowing that it falls into a particular technology category. Clarifying these terms upfront, and explaining what each solution can and cannot do, will make it easier for you to correctly assess what's best for your business.

What is a Contact & Customer Manager?

A contact and customer manager allows for the management of all tasks and information related to developing and maintaining relationships with the people, groups, and companies with whom you do business.

Contact and customer management involves a variety of activities, including the ability to:

- Centralize critical contact and customer information and stay organized.
- Manage and grow business relationships through top-notch communications.
- Prioritize your work to stay on top of appointments and tasks.
- Forecast and track sales opportunities for an improved bottom line.
- Access and report on information quickly for a complete view of customer interactions.
- Improve efficiency by integrating the applications you use everyday, such as Microsoft Office, Lotus Notes®, Palm OS® and Pocket PC devices, and accounting applications such as QuickBooks® and Peachtree by Sage.

Built on the foundation of a contact-centered database, contact and customer management software provides comprehensive tracking and instant access to all contact-related information. It's intuitively designed for the day-to-day management of contact information by an individual, workgroup, or corporate team.

Contact and customer management software is a tool to improve the way you build and maintain business relationships and enhance your professional image. It empowers you to focus on profitable endeavors, such as outshining your competition, by minimizing the time spent on routine tasks. It's an essential tool for consistently transforming contacts into customers and first-time customers into loyal relationships.

What is a Personal Information Manager (PIM)?

PIMs, such as Microsoft Outlook, were designed to help you organize basic personal computing information. They typically include an address book, calendar, and to-do list, mimicking the paper-based format of each. PIMs enable you to maintain your personal information, as well as basic information about contacts, but do not allow you to integrate information such as linking documents or e-mail communications to a contact.

Some PIMs provide basic contact tracking and searching functionality. For example, a PIM may offer the ability to attach notes to a contact, but it would not provide a historical view of that relationship. Piecing together relationship histories with a PIM would require a great deal of time and patience, plus supplemental applications (such as spreadsheets or other documentation).



A major difference between PIMs and contact and customer management is that PIMs contain isolated (as opposed to integrated) components. For example, in a PIM you might look at a calendar appointment in one view and then separately reference your contact list for details about the person you're meeting. Contact and customer management provides a 360 degree view of your contact information so you don't have to jump from one application to another to complete a task, plan your day, or execute your sales strategies.

A full-featured contact and customer management solution provides a 360 degree view of all the critical information you have about your contacts in a single, integrated application.

The Seven Essential Questions

Now that you're clear on what a contact and customer management solution does and how it differs from a PIM, it's time to figure out if it's the right solution for you. The following seven questions address typical "red flag" scenarios that signify a need for contact and customer management.

As stated in the introduction, if you answer yes to one or more of these questions, you are a strong candidate for contact and customer management software. To assess your current situation with the greatest accuracy, be sure to answer each question giving consideration to how your business might improve in each of the areas described.

Note that from this point forward, ACT! by Sage 2006 will be used as the representative contact and customer management solution. Contact and customer management references specific to ACT! may not apply to other contact management solutions.

Question 1: Have you ever wanted to organize all of your business data about a contact, customer or company, but couldn't figure out how to neatly compile it from multiple places and applications?

Compiling contact and customer data "under one roof" saves hours of wasted time for millions of contact and customer management users. It eliminates potential errors and the need to perform duplicate tasks. It frees you from the hassle of maintaining a contact list in one application, account history in another, e-mail communications and appointments in yet another, and keeping track of multitudinous documents on your hard drive.

A contact and customer manager provides a single, central repository for critical contact and customer information. It enables quick and easy access to every aspect of your prospect and customer relationships (e.g., addresses, phone numbers, e-mail, Web sites, notes, correspondence, documents, to-do items, and activities). The interface presents one consolidated view of each

contact, giving you an instant overview of that relationship. A tabbed interface design puts details a click away. Simply click the Notes tab, for example, to view all date- and time-stamped notes on a contact or customer record.

Working with isolated information silos is not only cumbersome, it jeopardizes the future of your business. When you use contact and customer management, you take responsibility for eliminating potential communication gaps, such as losing handwritten notes from a sales call or forgetting where you jotted your to-dos during a meeting. With a contact and customer manager, these preventable failures are far less likely to occur.

Question 2: Have you ever wasted time searching for a key piece of customer information or needed to retrieve exactly what you sent to a customer/prospect?

Never waste another hour searching through paper-based systems, multiple spreadsheets, and e-mail folders. With contact and customer management, you have complete information at your fingertips. And, if you don't immediately see what you're looking for, you can perform ultra-fast database lookups, even when searching on a partial name or word. Beyond the time savings, you'll reduce your frustration by quickly determining whether the data exists.

A contact and customer manager equips you with instant access to nearly limitless notes and history for each contact, so you're never caught off-guard when a customer calls. Simply click the Notes tab, for example, to see details of your last correspondence. Did you remember to send the proposal? You'll know precisely when you sent it by clicking the History tab, where all of your completed activities appear.

For more complex finds, you can use a Lookup or Keyword Search feature. You can execute numeric lookups using ranges such as greater than or less than to find contacts sharing common criteria. And, lookups can be saved as Groups. For example, you can create sales territories quickly and easily by performing a Lookup on the State field and then saving it.

Using a contact and customer manager also means never having to frantically search through your sent e-mail again! Every interaction (including e-mail) is tracked on the contact record, so you have a history of all communication with each customer.

Although most PIMs do offer some kind of search capability, the functionality tends to be limited. Also, when using a PIM, you're forced to search through it and other applications to find what you're looking for. With contact and customer management, you consolidate all contact data into a single database to enable speedy, comprehensive searches.

Question 3: Have you ever wished you had a personal assistant who kept you informed of every upcoming appointment, important date, and task?

Staying on top of your appointments and to-dos is a surefire way to impress customers, expedite sales, and reduce personal stress. Contact and customer management takes the

pressure out of managing your daily responsibilities—appointments, calls, to-dos, etc.—so that you can focus on the task at hand, instead of worrying about what’s coming next.

Using a Task List view, you can filter your calls, meetings, and to-do items by priority, date range, or user, and display totals for each activity type. Activity Alarms provide extra protection against missing a deadline by reminding you of deliverables and automatically pushing incomplete activities to the next day so nothing slips through the cracks.

You can view and print your schedule by day, week, work week, month, or multiple months and set reminders for important events. You can even maintain your schedule when you’re out of the office. Print up to 20 calendar formats including Day-Timer® and Day Runner®, and easily synchronize with Palm OS and Pocket PC handhelds.

Contact and customer management enables you to add a personal touch to your business relationships by reminding you of birthdays and other key dates. Also, to make sure customers don’t fall out of touch, you can perform a Contact Activity Lookup to see who hasn’t been contacted in a while. In essence, the software serves as your “personal assistant” who keeps you on top of your schedule and helps you extend the personal touches that keep customers loyal.

Question 4: Have you ever wanted an automated way to create and deliver customer communications, instead of spending hours or days creating them individually?

To generate future business, you need to regularly deliver marketing materials, promotions, and other communications to your prospects and customers. Unfortunately, it takes a lot of time to build and deliver these communications by hand. And, frankly, you’d rather spend your time selling. But, you can’t overlook the increased business that springs from personalized, automated communications and marketing materials. You just need a fast, easy way to get it done.

The marketing tools included in a contact and customer manager take you far beyond the one-off communications of a PIM. Using the a built-in Word Processor or integrated use of Microsoft Word, you can create personalized correspondence, including mail merge letters, e-mail, envelopes and mailing labels, and document templates. For professional e-mail marketing, some contact and customer managers include customizable HTML templates and an e-mail client that works with Microsoft Outlook, Outlook Express, Lotus Notes, Internet Mail, and Eudora®.

As an added convenience, all correspondence is linked to each contact for a complete record of what has been sent and received.

Question 5: Have you ever wanted to make an application work the way you want it to work, or wished multiple applications would work together?

Gaining flexibility in the way you work enables you to do more, even when you don’t have more time. The ability to form-fit an application to your needs, as well as to integrate it with other applications increases your productivity, efficiency, and creativity.

Out of the box, some contact and customer managers such as ACT! deliver instant flexibility by conforming to the way you conduct business, rather than making you conform to it. The solution allows you to customize field labels and types, globally customize screen layouts, and even custom-tailor every view, if you desire this level of specialization.

You can easily customize drop-down lists with standard entries that your business uses and designate field types (e.g., Yes/No, unlimited memo, picture, etc.), so that you always capture consistent information. For even greater productivity and efficiency, modify the navigation bar and menus to support the way you like to navigate.

Beyond customization, contact and customer managers provide flexibility by allowing you to integrate the solution with your other frequently used applications. Think of how much more quickly you could perform daily activities by combining contact and customer management with tools such as Microsoft Office, Lotus Notes, and more. Many businesses opt to integrate with QuickBooks or Peachtree accounting software, so that select users can see estimates, invoices, sales, and payments from within their contact and customer manager for a complete customer view.

Question 6: Have you ever wished you could gain clear insight into the exact status of all current opportunities – whether for yourself or for your team?

Planning your sales strategy requires insight into your current pipeline. If you don't know the life cycle of a typical sale or how many opportunities exist, then you can't realistically plan to predict and improve future sales cycles. Insight into your sales pipeline allows you to manage the right opportunities at the right time. It empowers you to know when to push harder to close deals and when to focus on adding more prospects to your pipeline. It puts you in control of your comprehensive sales strategy.

Using built-in sales opportunity tracking and forecasting tools, you can easily manage your sales pipeline by tracking each interaction with each contact in your database, from initial inquiry through close. When working an opportunity, simply click Follow-up to create a new activity for that prospect and automatically attach it to the contact record. For every contact, you can see exactly where you are in the sales cycle and more accurately predict a close date based on all prior interactions.

With some contact and customer managers, you can view all opportunities at once or filter by estimated close date, sales stage, amount, probability of close, etc. You can generate instant customized quotes from any opportunity – without re-keying data. Analyzing your sales pipeline couldn't be easier or more reliable; some even have an interactive graphical Sales Pipeline Report which allows you to drill down to see account details.

With very few exceptions, PIMs do not provide opportunity tracking or intelligence into your sales pipeline. If you wished to track opportunities as a typical PIM user, you would need to do so manually using an external application.

Question 7: Have you ever wished for a “bird’s eye view” into key areas of your business?

To perpetuate a successful business, you need access to high-level information that consolidates related data. This type of intelligence allows you to identify trends, lets you see the consistency of day-to-day operations from a distance, and makes it easy to isolate subsets of data that require separate analysis. As a result, you learn how to reproduce positive results and quickly end negative patterns.

Contact and customer managers give you insight into the key areas of your business by providing standard reports including Phone Lists, Activity Reports, Referral Source, and Sales Summaries. You can also use the Report Designer to create customized reports that summarize and analyze your data according to your specific needs. For added flexibility, you can export standard and customized reports to Microsoft Excel®, HTML, PDF, or e-mail.

Conclusion

If your business requires only minimal, isolated contact data and the ability to schedule basic appointments and to-do items, then a PIM may be suitable. However, if you’re a relationship-driven business professional, you likely answered yes to several of the Seven Essential Questions. In this case, your business needs may have evolved to require a more powerful tool for further growth. Now that you possess this knowledge, you can confidently explore your contact and customer management options and make an informed decision.

As noted earlier, ACT! was used as the representative contact and customer manager for many of the scenarios described. Some features discussed may not be available in competitive products. With more than two million users and 30,000 corporate customers, ACT! continues to be the market leader in contact and customer management for individuals, small businesses, workgroups and teams within an organization. Specifically designed to maximize user experience, ACT! is an easy-to-use solution that offers a low total cost of ownership.

Because many individuals migrate to a contact manager from prior solutions, ACT! offers an Import Wizard that makes it very easy to import your data from Outlook, Palm Desktop, and other common formats and begin working in the solution right away.

To learn more about what ACT! can do for your business, call 866-333-0988 or visit www.act.com, where you can purchase your own copy of ACT! or download a free 30-day trial.



Your business in mind.

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