info

For ACT! by Sage

Volume 3
Issue 1
Feb 2006

Top 5 ACT! Tips For The New Year

The new year may already be well upon us, but it's never too late to make resolutions to improve your business operations. If you're looking for some practical, effective, and easily-implemented resolutions, we've got a list for you. Read on for our Top 5 Business Resolutions—with tips on how to better use the ACT! by Sage database to help you achieve those resolutions.

1. Build Better Relationships

The purpose of ACT! is to provide a central repository, where you can go to a contact record and see virtually all of the information about that person. This includes all the history of calls, meetings, and activities, all the scheduled future activities and follow up, all documents, files, emails, and faxes sent to that person as well as how that person or organization relates to your company. Managing relationships is critical for all the types of contacts, including the obvious ones, likes customers and prospects, as well as vendors, partners, and suppliers.

Begin by simply resolving to start tracking all the interactions with all of your contacts in the ACT! database. Our favorite short-cut for this is on the History tab. If you *Right-Click* on that tab, you can select the *Record History* option. This will open a dialogue box that will let you record whether you had a call or meeting, or completed a To-do, such as sending literature.

2. Stay In Contact With Customers

Do you know how many of your contacts are Customers? If the answer is *No*, there are two key things that you can do in ACT! to help you with this resolution. The first is to categorize your contacts by using the ID/Status field. The ID/Status field is designed to be the field that defines the primary relationship between a contact and your organization. The broader the category the better, for example Customer, Vendor, or Prospect. Avoid using this field to track the rank or level of prospects and customers, we recommend that you use another field for that purpose.

ACT! is not simply an electronic rotary file of contact names, addresses, and phone numbers. Make the most of ACT! by using it to track all relevant contact details.

Once you have all your Customers marked or tagged through the ID/Status field, use the **Activity Series** to schedule a series of follow ups with each customer, or with a sub-set of your most important customers. You can easily create an Activity Series from the ***Schedule*** pull-down menu by selecting ***Manage*** and then clicking on ***Activity Series Template***. {See screenprint on page 2} You can create monthly calls, quarterly emails, and schedule multiple activities over the span of several months, or even a year, with just a few clicks.

Headline News

ACT! by Sage received honors from *CRM Magazine*, once again taking the top spot in the Sales Force Automation category. Overall, Sage Software received four market leadership awards, spanning the company's entire CRM product portfolio. The CRM Market Leader awards recognize CRM vendors based on their measured reputation for customer satisfaction, depth of functionality, company direction, year-over-year revenue growth, and industry analyst rankings.

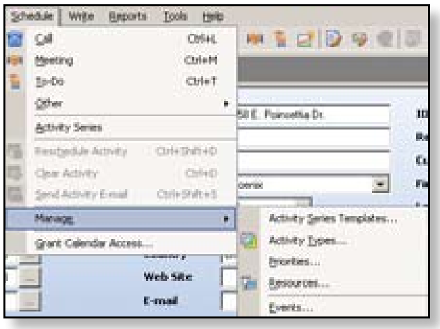
sage software
Authorized Partner
Select

Capitol Computer Systems Inc.

406 Second Street
New Cumberland, PA 17070

(717) 763-8859
(603) 258-0496 fax

Email: renee@capitolcom.com
Web site: www.capitolcom.com

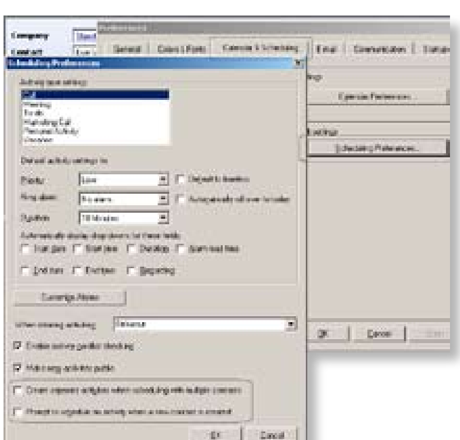


Schedule Pull-down Menu

3. Follow Up On New Leads And Prospects

It is more costly to acquire new customers than to retain your existing customers. But even with great customer retention, every business needs to continually find and close new customers. These new customers are the product of your leads and/or prospects. While you may understand how important these leads are, efficiently following up with and tracking leads can be hard to balance, especially if you have a significant base of existing customers that need your attention, or if you have a long sales cycle.

There are several ways that ACT! can help you here. First, every time you add a new lead or prospect to the database, be sure to schedule an activity, such as a follow-up phone call. You can actually set ACT! 2006 to prompt you to schedule an activity when you create a new contact. From the ***Tools*** pull-down menu, select ***Preferences***. Now click on the ***Calendars & Scheduling*** tab and click the ***Scheduling Preferences*** button. There are several check-boxes at the bottom, select the ***Prompt to schedule an activity when a new contact is created*** check box.

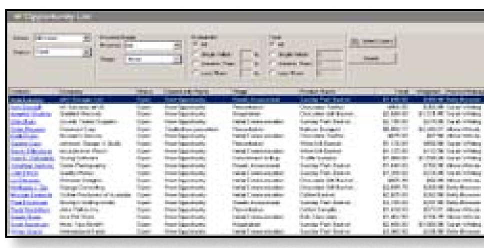


Tool Pull-Down Menu

Another useful option in this window is the ***Create separate activities when scheduling with multiple contacts***. Let's say you go to a networking event, and you come back to the office with 10 business cards. You can add all those contacts, then create a **Lookup** of all the new contacts added to the database today and schedule a follow up phone call, for all 10, at once. The check box for the "Create separate activities …" means that each of the 10 contacts will have his or her own follow up on the **Activity** tab in their contact record, even though you only had to enter the activity once.

4. Track The Sales Pipeline

With ACT! 2006, there is a new view, the **Opportunity List View,** that will serve you well. If you are currently tracking potential opportunities in an Excel spreadsheet, remember that the whole point of ACT! is to have all of the information about a contact in one place. Begin tracking your opportunities within ACT! using the Opportunity tab on each contact record. The **Opportunity List** view lets you see all your potential opportunities and gives you a one-click export to Microsoft Excel.



Opportunity List View

5. Clean Up My ACT! Database

If you have had your database for any length of time, then chances are you have some duplicate contacts, and probably some contacts that are not really appropriate.

To clean up those duplicate contacts, you can use the **Merge** function in ACT!. From the ***Tools*** pull-down menu, select ***Scan for Duplicates***. First you need to tell ACT! what criteria you want to use when evaluating contacts for duplicates. By default, ACT! will use three fields, Company, Contact, and Phone. This means that any contacts that have exactly the same information in those three fields will be caught as duplicates. But, if a contact is entered as "ABC Company" and the same contact is entered again as "ABC Company, Inc.", then ACT! will not perceive those contacts as duplicates. The best approach to merging duplicates is to play with the criteria, trying other field combinations, such as ***Last Name***, ***Address 1***, and ***Phone***; or ***Contact*** and ***Email***. Once you have a list of the duplicates, you can follow the ACT! Duplicate Merge Wizard to combine all the Notes, History, Activities, Sales Opportunities, Secondary Contacts, and Documents.

ACT! Duplicate Merge Wizard

Reducing duplicate contacts is an important task. The good news about the ACT! duplicate reduction process is that you get to look at each set of duplicates and determine which contact information you want to preserve, and from which fields such as like Email, Phone, or Mobile Phone.

We hope this list of our Top 5 Business Resolutions helps you think more creatively about how you can use the ACT! database to make 2006 a more productive and successful year. Please call us for more information about any of the tips in this article, or go to http://www.act.com/support/technicalsupport/knowledgebase/. You will need to create a profile, but this online, free resource is a great tool for any ACT! user.

About Our Guest Author

Stacy Roach is an ACT! Certified Consultant and Premier Trainer. Stacy has over 15 years of sales and sales management experience.