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## Headline News

Best Software received an **Excellence In Technology Award** from *Small Business Computing* ([www.smallbusinesscomputing.com](http://www.smallbusinesscomputing.com)) for their **ACT!® 2005** contact management system.

The editors of *Customer Interaction Solutions Magazine* ([www.cismag.com](http://www.cismag.com)) named ACT! 2005 a winner in its prestigious **Product of the Year Awards**.



## Using Sales Opportunities In ACT! 2005

**T**he new **Sales Opportunity** function in ACT!® 2005 is a flexible, robust forecasting tool. Let's take a closer look.

### List View

The **Sales Opportunity List View** is a brand new view that gives you the ability to view all opportunities at a glance. At the bottom of the view you can see the Total number of opportunities, the Weighted Total, the Probability of Close for each opportunity, and the Grand Total.

Like many list views in ACT!, this view can be filtered and customized. Filtering lets you focus on select opportunities based on any number of criteria. You can filter Opportunities by: Date, Status, Process/Stage, Probability, Dollar value, or User.

### Output To Excel

Now that you have the Sales Opportunity list filtered with exactly the information you need to see, you can quickly and easily send this list to Microsoft Excel for further analysis. Simply *right-click* and select **Export to Excel**.

### Quotes

To create a Quote for a new Sales Opportunity from the Sales Opportunity list view, *right-click* and select **New Opportunity**. Enter the information about the opportunity and when you are

ready to generate a quote, simply *click* on the **Quote** button. You can customize the Quote template in Microsoft Word to add your own company logo and any boiler-plate text that you wish.

### Custom Fields

With ACT! 2005 there are eight **Custom User Fields** that you can use to track additional information about a deal. These can be used for information about deals specific to your business model or sales process, such as bid request numbers, tracking types of deals, or other information that is valuable in your sales process.

### Multiple Products

When you are entering a new Opportunity, you now can include **Multiple Products** in one opportunity. You can *click* on the **Add** button in the New Opportunity dialog box and add as many products as make up that particular deal.

### Follow Up Button

A new **Follow Up** button on the Sales Opportunity dialog box allows you to schedule a call to follow up with the prospect, or even schedule the sending of an email to the prospect with a Quote or additional information about your organization or products.

Call us to get more information about tracking your sales opportunities in ACT! software. ★



Sales Opportunity List View gives you the ability to view and filter opportunities on screen.



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# Drip Marketing Feeds Your Sales Pipeline

**D**rip Marketing refers to the practice of sending multiple promotional pieces and marketing communications over time to clients, prospects, employees, or stockholders. The term comes from the phrase “drip irrigation,” an agriculture technique where small amounts of water are continually dripped to plants. Among marketing gurus, Drip Marketing is considered a highly effective marketing and communications tool for keeping your name in front of your desired audience. In this article, we’ll outline the ways in which ACT!® can help manage your next, or first, drip marketing campaign.

## Target Your Groups

Don’t try to be all things to all people; devise your marketing messages with specific audiences in mind. An effective way to accomplish this is to use **Groups** in ACT!.

Creating groups is a snap—any Lookup can be saved as a Group. You can delete Groups easily without impacting the contact record, so don’t hesitate to create as many as you need. A contact can be a member of any number of groups. Use them strategically to group customers geographically, by interest, by sales manager, by sales volume, or by any attribute that suits your business.

In ACT! 2005 you can create up to 15 levels of Subgroups. Utilize these Subgroups to allow for further personalized treatment. For example, within each geographic group, you could create subgroups based on sales volume or buying stage. A customer who hasn’t purchased from you in ages needs a different message than one who purchases regularly. Prospects in different stages of the pipeline or sales funnel might receive different messages, each targeted to their level of interest.

## Who Should Receive My Drips?

Both prospects and customers should receive your focused marketing attention.

You want to give your prospects ample opportunity to enter and move within your pipeline. Your drip marketing efforts can serve as a tool to help you gauge their interest level. For industries with complex sales cycles, it will take multiple contacts over a protracted period of time to even get a prospect to where they are willing to talk to you. Many market researchers suggest it takes between 10 and 20 contacts to

prompt a reaction in an audience.

Turning prospects into customers is important. Perhaps an even more crucial element in your company’s success is retaining the customers you have. Your current customers are your most cost-efficient source of new revenue. Typically, the cost of the sale is lower and the sales cycle is shorter. In many industries, particularly service industries, up to 70% of a company’s revenues come from existing customers. Drip marketing helps build customer loyalty and goodwill, and is an excellent way to introduce new products and services to your base.

## What Should I Say?

Your drips need a message or a purpose—they must be relevant. Here’s where your ACT! database shows its worth. Maybe you created a group of attendees of last year’s trade show. Send them an email or letter invitation inviting them to this year’s event or enclose a discount coupon if appropriate. Maybe you maintain a group of all customers who purchased from a specific product line. Send them an email to announce a similar or compatible product. Offer a limited time promotional price to incent them to take quick action.

Even though you may be delivering different messages targeted at different groups, consistency is important. Develop phrases or slogans that define your business and place them on each marketing piece. It’s a wise idea to hire a professional copywriter to make your words count.

## What Constitutes A Drip?

Several methods can be used in a drip marketing campaign, including classic postcard mailings and telemarketing. In this article we discuss two methods— Email and Letter—both easily and effectively accomplished within ACT! software.

### Email

ACT! lets you create dynamic emails and personalize them with your contacts’ name and details. Make your message short; email is an instant form of communication and a long litany of points will go unread. Use color, but avoid cutesy emails unless you’re selling cute. Use email to announce a new product or service offering or advertise an upcoming sale. Email is also a perfect tool to promote your company’s Web or e-Commerce site. Include links to

take your reader to the desired location. Make your email legally compliant by including the ability for the recipient to request removal from your solicitation list. Create a custom field within ACT! (e.g. *Do Not Solicit*) to record your contacts’ preference and to avoid sending emails to them in the future.

### Letter

Some messages are delivered more effectively by mail. Remember to make your message relevant; you need a reason for your letter. Did you just publish a new catalog? Send it to your customers along with a cover letter calling their attention to new products or services you’re sure would interest them. Creating letter templates and completing mail merges is a straightforward task within ACT! software. You can easily include fields from within the contact records to personalize your letters and to assure their relevance to your contacts.

### Follow Up

Following up on email or letter contacts counts as a drip, and presents a great opportunity to make a personal phone call. So take the initiative and follow-up with your customers and prospects. Don’t forget to record the results of your conversation within ACT!

### How Often Should I Drip?

There’s no magic interval that works for all businesses in all industries. A fresh produce business, for example, may benefit from weekly drips while a legal firm might limit drips to just a few each year. A general rule of thumb is to manage a drip campaign with communications occurring every four to six weeks. Drips that are too frequent may overwhelm your contact and cause your message to go unnoticed. Too few drips and your contact may feel you don’t care about their business, and make them vulnerable to your competition’s campaigns.

### The Harvest

The simple fact is, persistent marketing works. By consistently putting your message and your company in front of prospects and customers, you increase awareness of your solutions, which increases the chances you’ll be called upon when a need arises. Do it well and harvest the benefits. Give us a call if you’d like our assistance designing and launching an ACT! drip marketing campaign. ★