



CUSTOMER SUCCESS



ACT! by Sage Premium — a Valuable Investment for Amerifund

Amerifund, Inc., a leading national equipment finance company, provides commercial financing services that allow businesses to invest in the equipment they need to grow and succeed. By working closely with equipment suppliers, Amerifund is able to tailor its lending programs to meet the needs of Fortune 100 corporations as well as smaller companies. ACT! by Sage Premium is the solution Amerifund relies on to nurture its customer relationships.

“ACT! Premium enables us to manage our sales process and effectively market to our client base,” says R. Wade Rasmussen, president of Amerifund.

A Solution That Grows With Your Business

Rasmussen began using ACT! fourteen years ago, when his business was new. “I really just used it as an electronic Rolodex, keeping addresses and phone numbers of my clients and investors,” he recalls. Several years ago, Amerifund upgraded to ACT! Premium, rolling out the software to each of the company’s employees and allowing them to take advantage of centralized contact and customer information and powerful sales productivity functionality. Today, ACT! Premium has grown into an invaluable sales and marketing tool used by the entire staff.

Keep Sensitive Data Secure

Amerifund tracks its clients and its lenders and investors within ACT! Premium, segregating them in the database by using the ID/Status field. He praises the security features within ACT! Premium that enable him to hide individual fields and even entire Contact records from view. In this way, salespeople are free to view their own Contacts, yet prevented from viewing sensitive investor data.

Professional and Consistent Communication

Amerifund makes generous use of the template and mail merge functionality within ACT! Premium. Various lending documents are set up as templates, complete with mail merge fields to customize the document. While working with an ACT! Premium Contact record, Amerifund’ administrators simply select the appropriate template from a listing and the mail merge fields are automatically filled with Contact-specific data, such as name, address, and specific loan-related data. The letter can then be printed, faxed, or e-mailed.

Customer:

Amerifund, Inc.

Industry:

Commercial Financing

Location:

Scottsdale, Arizona

Number of Locations: 1

Number of Employees: 15

Number of ACT! Users: 15

Solution:

ACT! by Sage Premium

CompanionLink Express

CHALLENGE

As Amerifund sought to provide better sales and marketing tools to its staff, a scalable, integrated database was required.

SOLUTION

Upgrading to ACT! by Sage Premium gives Amerifund a single, centralized database accessible to the entire staff.

RESULTS

Amerifund is able to selectively target subsets of its database for e-mail campaigns. Mail merge templates save time and ensure consistent communication. ACT! Premium is easy to learn and use, and as a result, the adoption rate among staff is 100 percent.

“The mail merge saves us a tremendous amount of time,” says Rasmussen, “and it ensures consistency in our corporate communications.”

Target Your Marketing Efforts

“We regularly utilize ACT! Premium to send e-mails to our clients to notify them of programs that might be of interest,” says Rasmussen. “It’s effortless communication. We set a reminder alarm to send these notices out every quarter and use an e-mail template we’ve prepared.”

Rasmussen added several custom fields, allowing Amerifund to track the unique information about its clients, lenders, and investors. Amerifund is able to target a subset of clients in its ACT! Premium database based on geographic area, past borrowing activity, industry, or any of dozens more attributes. “We added a new Industry field, with drop down choices to keep the data consistent,” explains Rasmussen. “As a result we can create industry-specific marketing campaigns — tailoring our message to the industry.”

Other custom defined fields in ACT! Premium track the status of all of the company’s lending transactions. “This allows us to quickly pull up a list of all pending applications, for example, and work to close them,” Rasmussen says.

Rasmussen appreciates the detailed management information he is able to pull from ACT! Premium. He’s written several reports within ACT! Premium to show the *who*, *when*, and *how much* details of pending and open loans. A client may have credit available if their loan was approved for more than they have drawn. Rasmussen is able to zero in on these clients and extend special offers and incentives to them. “I like that I can access the data in many different ways, depending on what information I want,” adds Rasmussen.

Keep It Easy to Use

The fact that ACT! Premium is easy to learn and use is key to its high usage rate within Amerifund. “People are impatient, and if the software isn’t easy and intuitive, they won’t use it,” Rasmussen notes.

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Because the staff is comfortable working within Microsoft® Outlook®, Rasmussen has set up Outlook as the default e-mail client to compose, send, view, and work with e-mail while in the ACT! Premium application. Staff can schedule appointments and tasks using either the ACT! Premium calendar, the Microsoft Outlook calendar, or both.

Rasmussen runs the CompanionLink Express add-on for ACT! Premium on his Treo handheld device, allowing him to access and modify data directly on the mobile device and have it automatically update the ACT! Premium database. This ensures he is always working with the most current data.

Stick With What Works

Shortly, Amerifund will expand its services by offering mortgage financing. Rasmussen says he’ll rely on ACT! Premium for that aspect of the business as well. “We’ll just add a new database, to keep the sets of Contacts separate. ACT! Premium will work ideally for that side of the business too.”

Over the years, Rasmussen has tried other contact management software, including a solution specific to his industry. “I keep coming back to ACT!,” he concludes. “It only makes sense to stick with what works.”

If you would like to learn more about the ACT! by Sage family of products, please visit www.act.com or call 1-866-333-0990 to speak with a sales representative today.

ABOUT SAGE SOFTWARE

Sage Software supports the needs, challenges, and dreams of more than 2.7 million small and mid-sized business customers in North America through easy-to-use, scalable, and customizable software and services. Our products help manage a complete range of business functions including: accounting, operations, customer relationship management, human resources, time tracking, merchant services and the specialized needs of the construction, distribution, healthcare, manufacturing, nonprofit, and real estate industries.

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