Sage ACT! | Customer Success

Challenge
Buelow Financial Group kept track of customer information in an Excel spreadsheet with Lacerte and DMS tax software. As a result, client information could not easily be shared between employees and departments.

Solution
Upgrading to Sage ACT! provided Buelow employees a way to communicate valuable client information by consolidating multiple databases into a single database.

Results
The centralized database allows for better communication and client information sharing. Modifications allow Buelow to track the progress of tax returns within Sage ACT!.

Sage ACT! Provides Better Communication for Buelow Financial Group Employees

Operating since 1972, the Buelow Financial Group is located in Port Charlotte, Fla., and offers both financial advisory and tax consultation services. The company is dedicated to helping its employees build strong client relationships and provide the highest level of customer service by delivering multiple financial services that meet client needs.

After years of customer growth, Buelow's old system of using a simple Excel® spreadsheet with Lacerte and DMS tax software to track customer tax information no longer aligned with the company's goal of establishing effective communication between employees and departments. Cross-training Buelow employees became a challenge and there was a risk that client information could be overlooked with multiple databases. Taking these factors into account, Buelow Financial Group decided to transition to Sage ACT! as their centralized database for recording client information.

Adjusting to Sage ACT! proved to be an easy task for Buelow employees. Benefits of the new contact and customer manager were recognized immediately by staff members. "We use Sage ACT! for everything. Having client history and valuable information at your fingertips is great," says Janet Shriver, Office and IT Manager for Buelow Financial Group. Shriver adds, "Sage ACT! has made keeping track of customers much easier."

Tracking Client Information and Process

Part of Buelow Financial Group's criteria was to find a system that could be customized to meet the company's requirements. Shriver recalls, "After talking with three other CRM vendors who were not able to provide all of the features and support we required, we felt Sage ACT! was the one that could be personalized to meet our needs."

By personalizing Sage ACT!, Buelow Financial Group is equipped with a better tool for tracking multiple touch points between staff members and clients as they meet, interview, process, and develop a client's financial portfolio. Modifications to the opportunity table allow the company to track business progress within their system.

Customer
Buelow Financial Group

Industry
Financial

Location
Charlotte, Florida

Number of Locations
One

Number of Employees
32

System
Sage ACT!

Add-On Product
Durkin Task List Plus
Durkin Calendar View Plus

Moving forward, Buelow Financial Group plans to use Sage ACT! to track financial processes, such as delivering a client's tax return, to see what operational improvements can be made to provide better service to their customers.

Training Made Easy

Once implementation of Sage ACT! was complete, valuable training was quickly provided to acclimate the Buelow Financial Group staff to the new system. From there, training was strengthened internally by appointing Jackie Riola, a Buelow employee, to conduct in-house training sessions to reinforce the benefits of Sage ACT! and how it can be used to support client relations and cross reference information between departments.

Buelow employees adjusted well and recognized the value of Sage ACT! right away. Shriver recalls, "After the installation of the program, everyone got on the bandwagon and made it work."

Information at Your Finger Tips

Sage ACT! also adds to the goal of a paperless office. Buelow Financial Group was impressed with the ability and ease of Sage ACT! to keep track of client information—history, contacts, and tax and investment history. Staff members can view valuable customer information from multiple locations, making the need for printing reports nonexistent.

Staff members can also benefit from seeing all their information on their mobile devices. Shriver says, "After implementing Sage ACT!, tax season went much smoother compared to previous years. We are able to follow the client's tax return as it goes through our system and have all of the information concerning the return right at our fingertips." Shriver adds, "When clients have questions about the status of their tax return, we have it available to give them an immediate answer."

Buelow Financial Group is looking forward to using the program as a marketing tool, as well as integrating the client billing system with Sage ACT! and Sage Peachtree.

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– Janet Shriver
Buelow Financial Group
Office/IT Manager

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