

## Sage ACT! | Customer Success



### Challenge

A manual filing system became unmanageable as Golden Flame Distributing grew. The company needed an efficient means to schedule installations, track product details, and monitor service calls.

### Solution

ACT! Premium serves as an effective project management solution for the company, delivering a high degree of flexibility and customization options.

### Results

A single database containing details of every installation greatly improves operating efficiency. The company uses the data it collects in the ACT! Premium database to improve service levels and win new sales.

## Golden Flame Distributing sparks operations with ACT! by Sage Premium

Golden Flame Distributing, Inc. is a full-service provider of residential gas fireplaces to homeowners and residential contractors across the state of Arizona. The company relies on ACT! Premium to track new opportunities, schedule installations, monitor service calls, and ensure it delivers the high quality customer service on which its reputation is built.

“ACT! Premium has helped us improve every aspect of our business,” says Mark Williamson, service manager at Golden Flame Distributing. “It provides the infrastructure for the way we do business.”

### Business Heats Up

When the state of Arizona passed a law prohibiting wood-burning fireplaces in new construction, Golden Flame Distributing received a huge boost in sales. The company grew rapidly and was quickly faced with a record-keeping nightmare. Tracking sales opportunities, scheduling installations, and monitoring service calls quickly became an unmanageable task.

“We did it all manually,” recalls Williamson. “Our file drawers were full. When a builder called to schedule an installation, we literally had to put them on hold, go to the file cabinets, find the file, and leaf through the pages looking for the information we needed.”

Golden Flame Distributing evaluated both ACT! Premium and GoldMine®. “ACT! Premium is easier to use, plus it provides for the flexibility we need to add new fields and customize screens,” says Williamson.

### Match Your Operations

Golden Flame Distributing has turned its ACT! Premium database into a true project management solution by adding new tabs to capture and sort the data important to its operations. “We don’t use those file cabinets any more,” laughs Williamson. “All the information we need is now in ACT! Premium.”

Williamson added over 100 new data fields to the software. The company uses the new fields to track information such as model and serial numbers, subdivision, lot number, cross streets, and installation date. Drop-down lists for many of the new fields speed input and ensure the data is entered consistently,

### Customer

**Golden Flame Distributing, Inc.**

### Industry

Home Heating Equipment

### Location

Phoenix, Arizona

### Number of Locations

One

### Number of Employees

24

### System

**ACT! Premium**

*Note: Beginning with the 2011 version, ACT! by Sage is now called Sage ACT! and ACT! by Sage Premium is now called Sage ACT! Premium.*

maintaining the integrity of the database for accurate reports and queries.

“Now when we’re speaking with a customer on the phone, we just bring up their record in ACT! Premium and have all the information we need to schedule an appointment, or answer a question,” says Williamson. “Without ACT! Premium, we would have had to hire at least one other full-time person to handle scheduling.”

The company relabeled many of the fields within the software, such as renaming Company to Builder, to suit its business model, “ACT! Premium is very flexible. I can remove fields we don’t need, change the layout of screens, the color, the font—everything,” Williamson reports.

The flexible report writer within the software has enabled Golden Flame Distributing to develop a work order form which is printed and given to each technician before a site visit. The form includes customer contact information, directions to the site, notes of the last visit, and includes space for the technicians’ handwritten notes, which are later entered into Golden Flame Distributing’s ACT! Premium solution.

### Measure and Improve Quality

The dates and results of every installation and servicing visit are recorded in the software—data that has proved extremely valuable to Golden Flame Distributing.

“I’ve created reports that tell us the average number of trips it takes us to complete a job,” explains Williamson, “I use this data as a sales tool to show potential customers how efficient we are.” Williamson can also sort the report by builder, to see if certain builders are causing delays, or by technician, to monitor individual performance. “We use this information to boost our quality and make us more efficient,” he says.

Another report shows how many jobs the company has completed in a specified time frame, and another that details those not yet completed. “I include the dollar amount of each sale on that report, allowing us to focus in on high value jobs we need to wrap up,” notes Williamson.

In the event of a manufacturer’s recall of a fireplace component, the company is able to instantly identify every home into which

“We’ve seen enormous growth over the last several years, and anticipate the trend will continue. We would not be able to keep up with this growth without ACT! Premium.”

– Mark Williamson  
Service manager  
Golden Flame Distributors Inc.

they’ve sold a particular model, and generate a letter to the homeowners, right from within ACT! Premium. “Something like that would have been nearly impossible with our paper system,” says Williamson.

### Drive Efficiency

The group calendar function in ACT! Premium allows dispatchers to schedule installations and service calls for each of the technicians. Color-coding of the appointments is used to distinguish between technicians, providing a handy visual clue for the dispatchers. Each morning, the technicians are given a copy of their daily calendar showing only their appointments.

During a pre-installation visit, the technician takes a photo of the location, which is attached to the contact record in ACT! Premium, making it readily available to the technician who will perform the installation. Photos of the completed installation are also attached to the record; providing an easy reference should a question later arise.

ACT! Premium provides Golden Flame Distributing with a hardworking business management tool that’s powerful and flexible enough to meet today’s needs and tomorrow’s challenges.

“We’ve seen enormous growth over the last several years, and anticipate the trend will continue. We would not be able to keep up with this growth without ACT! Premium,” concludes Williamson.

#### About Sage ACT!

Sage ACT! makes it easy for you to have meaningful conversations with customers by giving you an organized view of the people you do business with. Like the millions of individuals in small businesses and sales teams who use Sage ACT!, you’ll always be prepared with recent emails, meeting notes, task reminders, and social media profiles, because all of these details live in one place. You can even use Sage ACT! like a sales and marketing assistant to get the right leads, send striking marketing campaigns, and track your overall performance. The bottom line, Sage ACT! takes care of the administrative stuff so you can focus on building long-lasting, profitable business relationships.

#### About Sage North America

Sage North America is part of The Sage Group plc, a leading global supplier of business management software and services. Sage North America employs 4,000 people and supports 3.1 million small and mid-sized business customers. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 13,100 people and supports 6.2 million customers worldwide.