

Sage ACT! | Customer Success



Challenge

Without a contact management solution, Pathways Home Health & Hospice was unable to centrally control data, provide group access to calendars and other critical information, and track staff performance or referrals.

Solution

ACT! Premium enables Pathways Home Health & Hospice to gain centralized control of contact data and provide mobile access to field staff.

Results

All contact-related data is managed in ACT! Premium, providing staff access that strengthens communication, enables execution of targeted mailings, and generates dynamic reports to drive improvements.

Customer

Pathways Home Health & Hospice

Industry

Home Healthcare Provider

Location

Sunnyvale, California

Number of Employees

650+

System

ACT! Premium

Add-On Product

HomecareCRM

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.

Pathways Home Health & Hospice Remedies Data Challenges with ACT! by Sage Premium

To provide care to nearly 7,000 patients and families, Pathways Home Health & Hospice must maintain very high levels of client service, communication, and organization. However, the community-based, not-for-profit home healthcare provider didn't consider using a contact management solution to facilitate their efforts until 2004.

For more than 25 years, Pathways Home Health & Hospice staff maintained contact records in personal documents, spreadsheets, binders of business cards, etc. At an organizational level, they were able to save very basic contact data (name, address, phone number, etc.) in an in-house database, but had no way to manage cumulative information such as notes and history and no way to access calendars as a group.

The company endured the typical challenges that stem from incomplete and non-centralized contact data. When people would leave the company, they'd often take critical information with them. Also, the organization's Community Education Coordinators (CECs) weren't able to see the actions taken by other CECs, which resulted in overlapping efforts and wasted time.

Choosing a Long-term Solution

Seeking a permanent change to their data management situation, Pathways Home Health & Hospice began comparing leading contact management and CRM vendors. The company designated a task force to compile requirements and examine solutions. The task force selected ACT! Premium based on ease-of-use and its long-standing reputation as the #1 contact and customer management solution.

After choosing ACT! Premium, the task force then determined how to optimize the solution's implementation and usage. They developed a comprehensive implementation plan, documented standards for use, defined security levels, and determined training criteria.

Working closely with their Sage Business Partner*, Pathways Home Health & Hospice implemented ACT! Premium and imported approximately 2,500 contact records from their existing database. They then worked side-by-side with the partner to design and deliver employee training.

The partner provided an additional level of service by offering a custom ACT! Premium interface, HomecareCRM, which is specifically designed to serve the needs of the home healthcare industry.

After implementation, the company's ACT! Premium task force continued to meet monthly for a year to monitor the solution and its users. They identified staff members who needed additional training, changes or customizations that needed to be made to the solution, as well as any problems from a technical or an end-user adoption standpoint.

According to George Sandoval, Communications/Project Manager and member of the task force, "The ACT! Premium user group and knowledgebase were very helpful resources for us. We appreciated seeing how other businesses tackled particular issues. We figured things out very efficiently."

Improving Communication

Pathways Home Health & Hospice primarily uses ACT! Premium to manage data on referral sources such as doctors, senior centers, and residential centers. Because healthcare is so highly regulated, doctors and other referral sources depend on CECs to know the regulations that may apply to their patients and members.

When visiting referral sources, CECs educate them on qualifications for referring patients, insurance and Medicare coverage details, advances in pain management, new treatments, and more. Using laptops in the field, they rely on ACT! Premium for easy access to information, whether referencing past notes, adding notes or tasks on-the-fly during a meeting, or recording history of a presentation delivered at a community center.

Pathways Home Health & Hospice also takes advantage of ACT! Premium features that improve communication within the ACT! Premium user base, and within the broader organization.

"We love Microsoft® Outlook® integration for calendars," says Sandoval. "Those using ACT! Premium can synchronize with others in the organization who only use Outlook. This saves significant time by removing the need to make multiple phone calls or send emails in regard to scheduling."

Note: Customer is a participant in the Sage Customer Reference Program and may be eligible for participation-based incentives.

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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.

"With ACT! Premium, we can slice and dice data better than ever before."

– George Sandoval
Communications/Project Manager
Pathways Home Health & Hospice

Taking Advantage of Centralized Data

Pathways Home Health & Hospice uses ACT! Premium to generate dynamic reports that help streamline operations and drive ongoing improvements. For example, one monthly report shows how many field activities were performed by Community Education Coordinators and another tracks referral patterns.

"With ACT! Premium, we can slice and dice data better than ever before," Sandoval adds.

Using the Groups functionality in ACT! Premium, Pathways Home Health & Hospice staff are now able to execute targeted mailings—a task which previously would've required very time-consuming, manual data processing. With ACT! Premium, they can send customized newsletters to groups of physicians, communities, nursing facilities, or other predefined groups in mere minutes. And, ACT! Premium automatically records each recipient in the History tab. The company also uses groups such as an Essential Mailing Group and a Do Not Mail Group to further control outbound communications.

In addition, ACT! Premium solved the organization's former problem of losing records when employees left the company.

"We don't lose data anymore," commentes Sandoval. "And, as an added benefit, we can now hire new staff and get them up to speed quickly because everything's right there in ACT! Premium."