

Sage ACT! | Customer Success



Challenge

Commercial real estate company depended on ACT! to deliver its successful service-oriented approach to client management. Fast growth was placing a heavy burden on the shared database.

Solution

Upgrading to ACT! Premium provides the additional power needed. Customized fields and reports support the company's client-service orientation.

Results

The Microsoft® SQL Server® database positions the company for future growth while retaining the ease of use staff members love. Powerful reports help keep the organization on track servicing clients' time-sensitive needs.

Customer

Richards Barry Joyce & Partners, LLC.

Industry

Commercial Real Estate

Location

Boston, Massachusetts

Number of Locations

One

Number of Employees

38

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.

ACT! by Sage Premium Supports Commercial Real Estate Firm's Focus on Client Service

The commercial real estate firm of Richards Barry Joyce & Partners was founded in 2001 by nine partners who left national brokerage firms in order to create a firm focusing on client service. This service-based approach, coupled with an internal environment that fosters communication and sharing of information, ensures clients receive the highest level of service possible. From the beginning, the ACT! by Sage family of products has been the pivotal software tool used by every staff member to support this service-based philosophy.

An Essential Tool

"ACT! Premium is so easy to use that, once it was installed, our staff quickly adopted the software as an ideal tool for tracking client information," recalls Samantha Bullock, manager of information technology at Richards Barry Joyce & Partners.

The firm relies on the ACT! Premium database to track detailed information for both its landlord and tenant clients. The shared database environment is essential to the firm's service focus; all staff members can see every point of contact the organization has had with a client. Staff members appreciate the convenience of ACT! Premium so much that they even use it to track their personal contacts, using the available feature to mark them as private.

Timely Release

The company initially purchased ACT!, a solution designed for individuals and small teams. It easily handled the load of 15 employees working concurrently in the database. But the service-oriented approach was so successful that the firm grew to 38 employees within two years, and the contact database grew along with it. Richards Barry Joyce & Partners' ACT! Certified Consultant* helped keep the database tuned for optimum performance, but both the consultant and Bullock realized that it was getting close to its recommended limits.

“ACT! Premium with the SQL Server database came along at just the right time,” Bullock says. “We needed to support up to 50 users and were outgrowing our ACT! system.” Bullock considered other options, but quickly settled on the upgrade to ACT! Premium as the best choice.

ACT! Premium offers the same user interface as ACT!, and is scalable to accommodate larger workgroups and sales teams. “We decided to stay with ACT!. It is the solution everyone is familiar with and it does what we need it to do,” Bullock states. “And when new people come in they learn it very easily.”

Powerful, Straightforward Customization

Another important factor in the decision to upgrade was the inherent customization capabilities of ACT! Premium. With the help of her ACT! consultant, Bullock quickly learned how to customize the software for Richards Barry Joyce & Partners’ unique needs. “I found customizing the system to meet our needs very easy,” Bullock says. She created a new tab entitled Needs Requirements in which to record client needs. Fields added to the tab included the preferred location, minimum and maximum square footage, and the date the space is needed. The data collected in these fields is used by Bullock to produce key reports. “The Tenants In The Market report is our bread-and-butter report,” she says. “It keeps everyone focused on requirements coming due and makes sure we handle them on a timely basis.”

Migrate Data Easily

The heavy reliance the staff members place on the ACT! database meant the data migration needed to be smooth and timely. The consultant carefully prepared the new and old systems, resolving conflicting field names, cleaning up data, and making sure groups were set up the same way prior to conversion. The consultant also recreated the required reports and made sure they were working properly prior to going live. “Our consultant made the upgrade experience seamless,” Bullock says happily. “The upgrade was completed in a week, and the Tenants In The Market report worked perfectly the first time.”

** Certified Consultants are third-party vendors. Sage and its affiliates are in no way liable or responsible for claims made related to the services provided by third-party vendors.*

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

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.

“We made the right decision staying with ACT!. We have a cost-effective solution that has both the power and ease of use that we need.”

– Samantha Bullock
Manager of Information Technology
Richards Barry Joyce & Partners, LLC.

Boost Productivity with Remote Access

With client projects in Boston, Bangalore, Frankfurt, and London, the ability to take the database with them is a key requirement for the firm’s staff members. Partners routinely synchronize their contacts with their BlackBerry® and Pocket PC handheld devices and then make notes while they are traveling. These notes need to be synchronized back into ACT! Premium when the partner returns to the office. To handle this requirement, the consultant recommended Companion Link, a product that integrates with ACT! Premium. “One of the nice things about ACT! Premium is the availability of add-on products to handle specialized needs,” Bullock comments.

Position For The Future

With ACT! Premium and its powerful, customizable SQL Server database, Richards Barry Joyce & Partners has a software tool with the ability to grow as the company grows. “We made the right decision to stay with the ACT! solution,” Bullock says. “We have a cost-effective solution with both the power and ease of use that we need.”