

Sage ACT! | Customer Success



Challenge

A busy design firm, Design North needed to stay organized and responsive to its high-profile clients.

Solution

ACT! Premium for Workgroups delivered organization, communication, and marketing tools to Design North.

Results

Direct mail and telemarketing campaigns are launched and tracked with ease; the central database helps with turnover transitions; and task reminders ensure timely follow-up with clients.

Customer

Design North, Inc.

Industry

Brand Strategy & Design

Location

Racine, Wisconsin

Number of Locations

One

Number of Employees

13

System

ACT! Premium for Workgroups

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

ACT! by Sage Premium for Workgroups Helps Design North Deliver On Their Promises

Design North, Inc. creates inspiring design that delivers powerful results for companies marketing brands in the retail environment. This second generation family-run firm has some impressive names in its portfolio. Market leaders such as Abbott Laboratories, Birds Eye Foods, Briggs & Stratton, and Snap-on all turn to Design North.

Expect Great Things

The company's success depends on skillful communication between its external and its internal customers. ACT! by Sage is the communication solution Design North has relied on for more than five years. "Our customers expect great things from us," explains Lee Sucharda III, president of Design North, "and ACT! helps ensure we remain responsive to their needs."

Sucharda says the company originally chose ACT! for its ease of use and intuitive interface. "We wanted a reliable contact management system that had the marketing and communication functionality, without the overhead of the features we didn't need—ACT! was affordable and included just what we needed."

Recently, the company upgraded to ACT! Premium for Workgroups to take advantage of the advanced workgroup functionality and centralized administration features. Explains Sucharda, "Using the feature that allows us to create a new Group from a Lookup, we can search for clients or prospects that meet certain criteria, and instantly create a new Group from that list." Another feature Sucharda appreciates is the ability to click on the company name within a Contact Record and see a listing of all the contacts associated with that company.

Targeted Marketing

Direct mail is a fundamental component of Design North's marketing strategy. ACT! Premium for Workgroups allows the company to administer all aspects of its direct mail campaigns: targeting its audience, generating mailing labels, tracking the communication, and recording the results. The company uses a custom field within ACT! Premium for Workgroups, labeled *Industry*, to target prospects within a certain business sector to receive a particular mailing. Telemarketing campaigns are similarly managed. Design North's staff can create a group of prospects in ACT! Premium for Workgroups, and work from that list making phone calls. Results are recorded and follow-up actions are scheduled within ACT! Premium for Workgroups.

Organized By Design

Sucharda relies on his ACT! Premium for Workgroups calendar to keep his busy days organized. "I can click on a telephone appointment on my calendar, and ACT! Premium for Workgroups opens the Contact Record so I have all the background information for my call right there."

The group scheduling feature in ACT! Premium for Workgroups allows staff to schedule meetings while viewing the availability of other team members. The ability to schedule recurring events—a Wednesday staff meeting or the first-of-the-month follow-up phone call—is a favorite time-saver among staff.

As tasks are scheduled, pop-up reminders help ensure appointments, telephone calls, or meetings are not forgotten. As a task is completed, staff can record the resulting notes and append them to the contact's history record.

"We're all busy people, yet we don't want important tasks to get overlooked," says Sucharda. "When we say we're going to do something—we do it. ACT! Premium for Workgroups helps ensure we follow through on our promises."

Using ACT! Premium for Workgroups as the receptacle for all customer-related communication means that valuable information about customer relationships is not lost when there is turnover of Design North's staff. "Having that information in a secure, shared location helps ease any turnover transitions," explains Sucharda.

Value For The Long Term

Design North's ACT! Certified Consultant configured ACT! Premium for Workgroups, adding and relabeling fields to tailor the solution to the company's needs. Sucharda says their consultant added tremendous value to the implementation, allowing Design North to take advantage of all the functionality within ACT! Premium for Workgroups. During the upgrade to ACT! Premium for Workgroups, the consultant helped ensure a smooth transition with no downtime.

"Our customers expect great things from us, and ACT! Premium for Workgroups helps ensure we remain responsive to their needs."

— Lee Sucharda III
President
Design North, Inc.

With the consultant's assistance, Design North configured ACT! Premium for Workgroups to allow remote access through the company's Citrix server. Now staff who are traveling or working from home can easily access the ACT! Premium for Workgroups database. "It's a real benefit to have that anytime, anywhere access to our customer database," says Sucharda.

Sucharda notes that one measure of the success of ACT! Premium for Workgroups at Design North is how little feedback he receives about it, "If it wasn't working—I'd hear about it. Because we find it easy to use, reliable, and so much a part of what we do each day, we rarely give it much thought.

"There's an intrinsic value to ACT! Premium for Workgroups for our organization. Being efficient with our time, being organized, and being consistent in our follow through is fundamental to the way we work."

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.