

# ACT! by Sage | Customer Success



## Challenge

KM Medical was losing time, opportunities, and money due to unresolved issues with their previous solution provider – Salesforce.com.

## Solution

ACT! was implemented literally over night.

## Results

KM Medical attributes saving several thousand consulting-dollars per year to the knowledgeable tech support staff at Sage. Over 100 hours of data entry are shaved with a team-shared view of customer interactions within ACT!.

## ACT! Pummels Salesforce.com as Best of Breed in Technology and Customer Service

KM Medical is a 20-year-old medical supply distribution company serving the needs of hospitals and medical practices throughout New England. With a home office in Newburyport, Massachusetts and a remote office in Connecticut, this sales-driven company stays connected to its customers and its own staff through the efficiency gained with ACT! by Sage. However, as little as 8 months ago life wasn't so easy. Boggled down by manila folders and a tumultuous relationship with Salsforce.com, KM Medical was losing opportunities and was increasingly frustrated with technology that they perceived to be working against their efforts.

### From Zero Support to Hero Support

“About 2 years ago we were shopping for new software,” says company president Kathy Logan. “We started using Salesforce.com. But it took just one year to find that the software was difficult to use and customize. Their technical support staff couldn't help either; we received absolutely zero support. We needed a change quick.”

Logan notes that going back to a paper system was simply out of the question. Staff at KM Medical had past experience using ACT!, so that was the logical choice. “If we were to make a change, it had to be simple,” says Logan. “Anyone who runs a business understands that you get pulled in a ton of directions. You can't have technology slow you down.”

Logan gave tech support a call after purchasing ACT! for assistance with getting the system up and running with all of the data from Salesforce.com. “I just can't believe how incredibly helpful they are,” says Logan. “Plus they're fast. I used to wait up to 45 minutes to talk with someone from my old vendor, now I get someone on the phone within a matter of minutes. When I first called, they explained how to export the data from Salesforce.com and import it into ACT!. I took my computer home and completed the process over night. It was so easy.”

### CUSTOMER:

KM Medical

### INDUSTRY:

Distribution – Medical Supplies

### LOCATION:

Newburyport, MA, USA

### NUMBER OF LOCATIONS:

1 location

### NUMBER OF EMPLOYEES:

6 employees

### NUMBER OF USERS:

6 users

### DATABASE SIZE:

5000+

### SOLUTIONS:

ACT! by Sage Premium  
ACT! by Sage Premium for Web

### MODULES:

Calendar and Activity Management  
Contact and Customer Management  
Sales Opportunity Management  
Dashboards and Reporting  
Customer and Prospect  
Communications  
System Manager

### ADD-ON SOLUTION:

CompanionLink

## Provide Thoughtful Customer Service

Logan is proud of the fact that since the company started two decades ago, business has grown mainly through one-to-one interaction. She believes the personal relationship is what makes the company a success. The Contact and Customer Management module in ACT! allows her staff to stay connected to customers through “thoughtful” interactions. “Every person on my staff is trained to utilize the notes feature to summarize their conversations with clients,” Logan states. “This way we can be prepared to address a specific need or simply ask follow up questions regarding the previous conversation during the next call. It helps our customers see that we care about their business.”

ACT! gives KM Medical a 360-degree vision of every business relationship. Now, there’s no need for every staff member to keep separate notes—a time savings that Logan calculates to be over 100 hours per year. Staff also has their Microsoft Outlook e-mail and calendar clients integrated with the contact notes feature. This provides a level of consistency and accuracy that bodes well for the company’s continued vision of providing a superior customer experience.

## A Mobile Application for a Mobile Workforce

KM Medical staff has greatly benefited from the integration shared between ACT! and third-party vendor CompanionLink Software. While away from the office, they can use their Palm Pilots to keep track of all contacts, personal activities, activities linked to contacts, notes and histories, to-do items, alarms and reminders, and more.

“It’s nearly impossible for a sales person who is on the road much of the time to remember all the necessary details of a customer or their individual schedule for any particular day without this synchronization,” Logan says. “There was more than one occasion before ACT! and CompanionLink that meetings were missed.”

The integration shared between these two applications provides KM Medical with an informed and readied mobile workforce. Additionally, ACT! Premium for Web provides instant access to updated information anywhere there is an Internet connection.

## Marketing in the Future

One feature that really stands out to Logan is the ability to create groups based on specific profiles, and then place like-clients within the corresponding category. This allows Logan to send out messages to multiple individuals at once; saving her the most precious commodity of all—time.

“In the near future I plan on developing marketing campaigns that will target the needs and preferences of the clients within each group,” says Logan. ACT! is paving the way for KM Medical to communicate more efficiently and effectively with all 5000-plus contacts in their system on a regular basis. Logan knows that ACT! is helping her run a sophisticated operation.

At the end of the day Logan says, “I needed a way to communicate with ease. I needed great technical support. I needed a solution that just works. I knew where I wanted to take the business, and Salesforce.com couldn’t get me there. With ACT! I’m becoming an expert one step at a time. And the best part is, it’s so gosh-darn easy.”

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— *Kathy Logan*  
Owner, KM Medical

**TO LEARN MORE ABOUT ACT! BY SAGE, PLEASE VISIT [WWW.ACT.COM](http://WWW.ACT.COM) OR CALL 1-866-903-0066 TO SPEAK WITH A REPRESENTATIVE.**

### About Sage CRM Solutions

Sage CRM Solutions is a portfolio of market-leading applications consisting of ACT! by Sage, Sage CRM, and Sage SalesLogix. Over 56,000 organizations and 3.1 million users worldwide rely on Sage CRM Solutions to develop profitable, long-term business relationships.