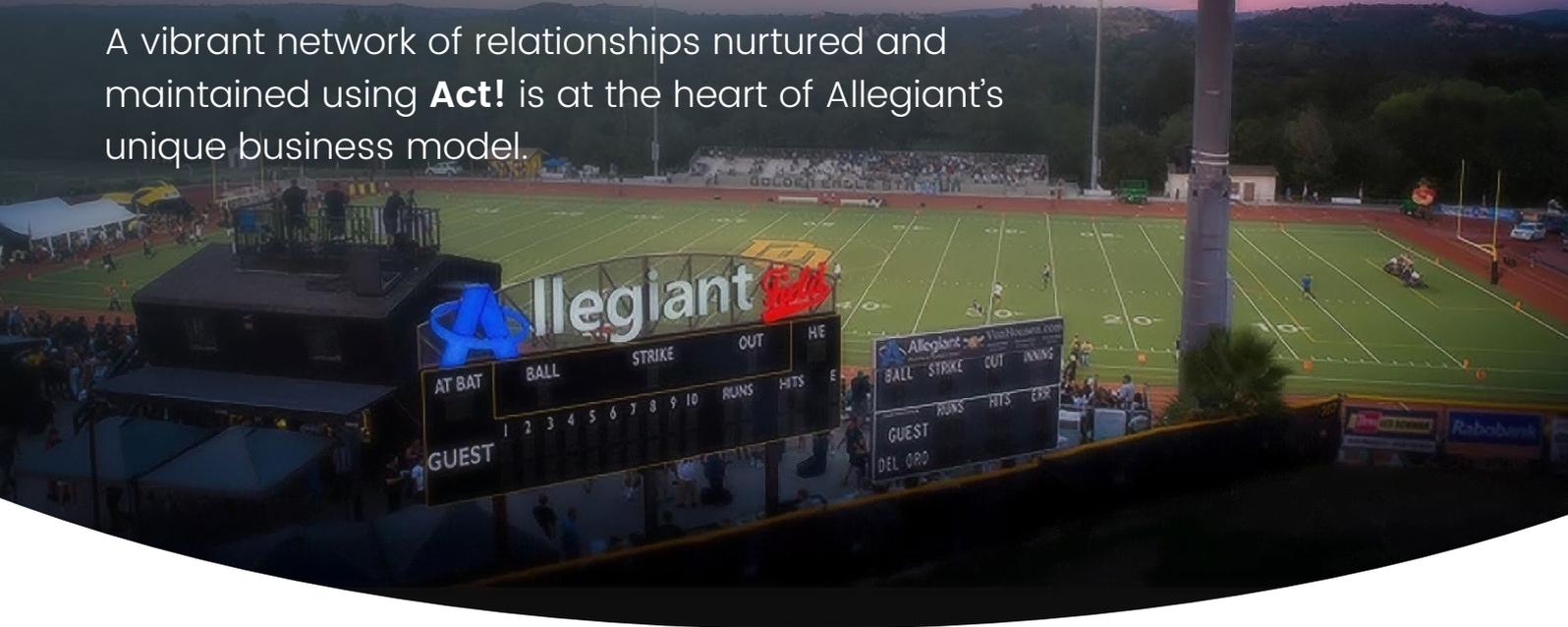




act!™

# Act! creates great connections

A vibrant network of relationships nurtured and maintained using **Act!** is at the heart of Allegiant's unique business model.



## Allegiant Giving

*Investing in Today's Heroes  
and Tomorrow's Leaders*

'Today's heroes and tomorrow's leaders' is the Allegiant Giving Corporation's slogan. It hints at this not-for-profit's fundraising work to equip seriously injured veterans with specialist wheelchairs, as well as the support it offers to local high school students.

Allegiant's unique blend of charitable work, networking and training is based around an ever-evolving system of prospects, partners, donors and participants.

Managing this interconnected network is only possible because of Act!.

“It makes everyone who uses it much more effective, and it means that even a small organization like ours can do much more. Given its power, **Act!** pays for itself.”

**Michael Matthews**  
Co-founder

“I've been a fan of Act! from the early days,” says Allegiant's co-founder, Michael Matthews. “My enthusiasm for it as a CRM system is I guess the reason Allegiant uses it today and has done so since we set up in 2010.”

“It helps us maintain our relationships by remembering all the things you wouldn't otherwise remember,” says Michael. “It's of fundamental importance to what we do. It makes everyone who uses it much more effective, and it means that even a small organization like ours can do much more. Given its power, Act! pays for itself.”

## Managing delicate relationships

Everyone who Allegiant engages with is entered into the system. When appropriate, records are also tagged to show if someone has need for a service or product that one of the partners in Allegiant's network could meet.

"We don't just have conversations about giving," says Michael. "We are also having conversations about business."

Being able to track information, organize follow-ups and turn data into knowledge is indispensable. But any CRM is only as good as the information entered into it. That's why Michael instills the need for accuracy into all new student interns coming into Allegiant from local high schools to work on short-term projects.

"We rotate interns quickly," says Michael, "so each one has to leave a trail that the next intern can pick up, maintain and improve upon. That means making sure information entered into the system is accurate," says Michael. "Some relationships are delicate, complex and need to be 'massaged', so a call from an intern wouldn't be appropriate," says Michael.

Ensuring accuracy means "demanding discipline to make certain every detail is entered correctly into Act!," says Michael. "I tell everyone to take the time to document everything, especially the random phone call they might get when out of the office."

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**Michael Matthews**  
Co-founder



## Don't wait. Initiate.

“My philosophy is that if you're waiting for someone to call you, then it's not going to happen,” says Michael. “But with Act! I don't have to wait. I can initiate a conversation, which I do with notes open on the screen in front of me as a reminder of what we talked about the last time.”

“We are constantly reaching out to people who don't know who we are,” says Michael. “That means communicating with them in a way that shows we know what we are doing. We have to tell our story well and present it professionally right from the start.”

Act!'s email templates allow Allegiant to bring extra professionalism to their email marketing without the need for a graphic designer.

Allegiant is currently based in Rocklin, California. However Michael is eager to see its unique business model replicated in other locations and by future generations who want to play their part helping today's heroes and creating tomorrow's leaders.



## Results

- Allegiant is growing its database of prospects, partners, donors and participants all the time. Currently it has about 4300 records in Act!.
- To ensure the consistency of its records, Allegiant has a very structured approach to how data is entered into Act!
- By tagging records appropriately, Michael and his team are able to create a very valuable, information-rich network of connections.
- Allegiant uses Act!'s email templates to give its marketing communications a professionalism that would not otherwise be possible without using a graphic designer.

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