

Switching to Act! pays off for mortgage specialist



act!™

The ability of Act! to capture, retrieve and use customer information can give a small business the competitive advantage.



“When every other small mortgage broker is embracing technology, I believe that Act! gives me an edge.”

Paul Barden

Owner, Barden Financial Services

Whatever the size of your business, to offer a truly professional service you must be able to access customer information quickly and accurately. Fortunately, Act! has the flexibility to do exactly that, even for a small business.

Being pulled in all directions is just part of being a small business owner, constantly having to switch between bookkeeping, marketing and sourcing suppliers, as well as doing the work that actually makes you money. Having to do so much means that it's easy to lose focus on customer service.

That's a trap which Paul Barden, a 25-year veteran of the mortgage broking business, was determined he wasn't going to fall into, by making his firm, Portsmouth-based Barden Financial Services, as professional as it could be by embracing the right technology.

“I always wanted to have a paperless business,” says Paul, “so when someone told me about Act! I thought I'd take a look.”

That was eight years ago and now Paul holds all his client information in Act!, which enables him to manage his business far more effectively and efficiently than would ever have been possible before.

“As a mortgage specialist, I’m in a ‘transactional business,” says Paul. “While an investment adviser may need to service their clients once or twice a year, if I’ve sold someone a fixed-term mortgage, there’s no real reason for me to get in touch until the end of their mortgage term is approaching, or they want to move.”

That means clients’ personal details and previous mortgage deals don’t have to be constantly on Paul’s radar, just at an appropriate time.

“Now I can set up a calendar reminder to get in touch with a client in two or three years, and leave Act! to prompt me at that time, which makes life a lot easier,” says Paul, “because I get all their personal and financial details right there in front of me when I need them.”

“Being able to talk knowledgeably with a client about them and their financial position shows your interest in their situation and your commitment to helping them,” says Paul.

“And being able to stay on top of their details like this makes me feel more professional about how I’m managing my business. It’s always impressive to be able to tell somebody you’ll call them back in three weeks, then do just that because Act! has automatically programmed a follow-up call into your day.”

It all helps to generate a good rapport with the client, which is essential in building a long-term relationship with them. This is vitally important in the financial sector, where so much trust has been lost over recent years.

Given this, it’s perhaps not surprising to hear that 90% of Paul’s new business comes from word-of-mouth.

Staying in touch was particularly important to Paul’s business during the credit crunch. With many clients hanging back from making major financial decisions or moving house, by using Act! Paul was able to make sure that when they were ready to move, he was ready to help them.



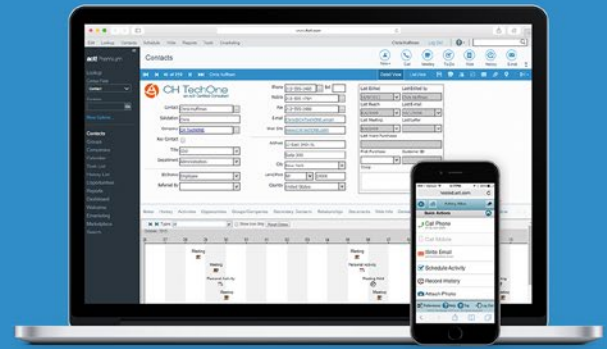
On a more practical day-to-day level, Act! is also a real time-saver.

“In the past, when I’d archived a client’s paperwork and they came back to me for a new mortgage three years later, I’d have to retrieve their paperwork out of storage before I could review it. That might only take 15 minutes, but when it’s happening three or four times a day, it adds up to the best part of an hour wasted!”

Now, with Act!, Paul can pull up a client’s records any time they call, and immediately start talking with them in an informed way about their options.

Going forward, Paul is looking to grow his business, without compromising service standards, by using Act! to create and distribute a regular newsletter. It’s not something he’s done before, but he only needed a single training session with an Act! Certified Consultant before he felt confident enough to train his wife Lisa to use the system, so he’s sure it won’t be a difficult or time-consuming process. And that’s important when he has a high volume of calls to manage.

“I’ve got a service contract with Swiftpage, and the team there are excellent when it comes to any technical question I have about the software,” says Paul. “It’s good old-fashioned customer service from people who can’t help you enough. They are top-class.”



Results

- **Much faster retrieval of archived material** about his clients, which means Paul can save up to one hour a day.
- **Ability to react instantly** when clients get in touch after what can be long periods.
- **Immediate access to client information** gives the sense of professionalism that Paul wants for his business.
- **If problems do occur** during the mortgage process, Paul can address them quickly, helping clients secure the homes that they want.
- **Act! offers a much more organized approach to communication**, with clients being contacted at the right time and in the right way.
- Act! is an **uncomplicated system that’s simple to learn** and use for any single person business that needs to manage its client base more effectively.

Contact

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