



act!™

Act! generates big returns for finance firm

This equipment finance broker is reaping real dividends by using Act! to become as efficient as possible, enabling it to post impressive sales figures despite downsizing its core team.

CHARTERCAPITAL
EQUIPMENT FINANCING SINCE 1977



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Carey Wilbur
Founder & Partner

When companies need to purchase equipment they come to us for financing,” says Carey Wilbur, a partner with Charter Capital in Scottsdale, Arizona.

“We have a wide range of customers and can finance a wide variety of equipment. We can finance medical equipment, construction equipment, computer based equipment, software, vehicles, etc.”

While many of their customers, particularly those in the rental sector, arrange finance regularly, other customers don’t need finance so often. “Sometimes we’re only doing a transaction every three or four years with a customer,” says Carey, “but we’ve been

doing that for the last 25 years, and Act! has been vital in helping us keep track of conversations with all of our customers.”

“We have 35,000 contacts in our database,” says Carey, “and Act! helps make us more efficient.” And here’s how much more efficient.

Act! turns a small team into a sales powerhouse

After the financial crisis of 2008, like many businesses, this family-run firm had to reinvent itself, slimming down its workforce from 35 to just 6 core people. But even though the team is now just 20 percent the size it once was, the company’s still achieving 75% of its previous sales volume, and that’s in large part due to Act!.

Act! turns a small team into a sales powerhouse (continued)

Despite their obvious success in bringing in new business, there's no hard sell. So, unlike many other firms in the sector that are all about one-off deals, Carey is much more interested in building relationships with clients.

Act! helps with relationship building

"That really matters to us," says Carey. "Most companies in our Industry run typical telemarketing operations, but now we're much more focused on trying to earn a customer's business. Our goal is to earn their business. Once we do that, we know there's a very good chance we will continue to earn their business and they won't shop around."

"I think this soft-sell approach resonates with a lot of people, so even though we might not always be cheaper than a bank, our customers know we're going to take good care of them and make the whole

process as easy as possible for them. That creates good will and good will creates customer retention."

For Carey, one of the best things about Act! is the way it scores prospects based on the emails they have opened or the links they have clicked on the company's website. "So, a couple of times a week I'll just check who's scored high, meaning they've opened our emails and clicked on our links. They've interacted with our communication and showed some interest. I'll just give them a call or send them an individual email and it's amazing how many times they say they were just about to call me or were going to respond to my email."

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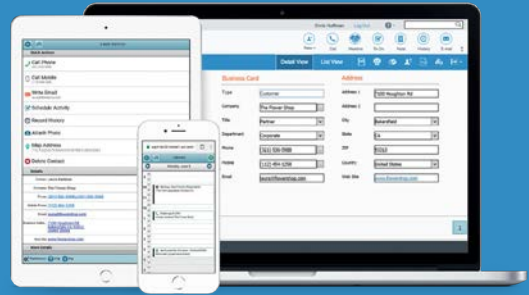


Long-term loyalty to Act!

To maintain that softer, consultancy approach, it's crucial Carey and the team stay in touch with potential customers in the right way. That means communicating regularly enough to stay top of mind, but not so often that they're annoying.

"We've started using Act! for email marketing and that's made a night and day difference," says Carey. "We used to work with digital marketing companies who had their own ideas about what software could merge contact management and email marketing into one system. But we've never wanted to move away from Act! because we know it works and we've been using it for so long, since version 2.0 in 1995 I think."

When it comes to making minor tweaks or changes to Act!, Carey does those himself, but for upgrades or more major changes he reaches out to Debora Boyle, an Act! Certified Consultant with Action Platinum Solutions. "She's helped us with Act! from day 1," says Carey, "and is always there as a resource when I have a question or if there's an issue I can't sort out myself."



Results

- Charter Capital has about 35,000 contacts in its Act! database, which includes customers from many different sectors, all of whom have their own particular financing needs.
- Despite coming under pressure from digital marketing companies to change systems, Carey has remained a loyal user of Act! because he knows how well it works.
- Act! is an ideal tool for helping build and develop the long-term relationships that Carey wants to achieve with his clients.
- Thanks to Act! the company is still achieving 75% of its previous sales volume with just 20 percent of the staff it had before the 2008 financial crisis.
- Act!'s ability to score prospects enables Carey to focus his attention on those potential customers who are most likely to turn into sales.

Contact Act!

United Kingdom: **0845 268 0220**
Ireland: **0766 801 364**
Australia: **1300 724 327**
Switzerland: **043 508 2364**
Germany: **0800 181 2014**

United States: **866 873 2006**
South Africa: **0105 003 672**
France: **09 75 18 23 09**
Belgium: **078 483 840**
New Zealand: **0800 443 163**

orders@act.com

www.act.com/uk

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