What a great balancing Act!

While Act! has the flexibility to integrate with a wide range of other applications, ideally it should be at the center of things, where it's best suited for managing the wealth of information that is vital to any business.

act!™

NAVI Solutions

> " I could see that Act! Marketing Automation would be the best solution because it not only had the capabilities we were looking for but also integrated with the CRM side of Act!."

Alex Kramer
Co-founder

When Alex Kramer took over pumping and fabrication firm NECO Systems back in 2006, on everybody's desk was a Rolodex.

That meant, if you needed a customer's phone number, you had to shout around the office to find someone who had it.

Worse still, the company's entirely paper-based systems meant historic information was kept in physical files and folders indexed by job number.

"That made it difficult enough to get at data when you were in the office … and impossible if you weren't," says Alex. "And, when a customer called to arrange for service of a pumping system, for instance, and they didn't know their job number, hunting down their details was really time-consuming."

Act! helps get the balance right

Given all this, Alex, was eager to automate as many processes in the business as possible using technology, so he brought in Act! as he'd used it before and "knew it would be good for managing all the conversations and interactions we were having with customers and suppliers."

Act! helps get the balance right
(continued)

He also introduced a couple of third-party applications into the company – QuoteWerks for quoting and QuickBooks to handle financial information. But with some elements of each of the three applications doing similar jobs, trying to find the best way to use the three together was still something of a challenge.

"We struggled to get the balance right between them to begin with," admits Alex. "For instance, we tried tracking jobs in QuickBooks, but that was a complete disaster, which is why now we keep QuickBooks purely for accounting so only purchase orders and invoices are integrated with other applications."

Now Act! is very much at the center of things because it holds information on every interaction with customers and suppliers, with the other applications revolving around it.

"Eventually, I think we managed to create quite a tightly integrated system for something that isn't all under one umbrella," says Alex, so much so that he has replicated the same configuration at Navi Solutions, a new company set up last year to make products for monitoring pumping systems, all part of the industrial Internet of Things (IIOT).

Act! helps get the balance right

As part of the marketing strategy, NAVI always wanted to use email to drive customers of NECO Systems over to the Navi Solutions website. "I wasn't sure what software would work best," says Alex, "but after reading Gartner reports on various applications I could see Act! Marketing Automation was going to be the right solution for us. It had the capabilities we were looking for but it also integrated directly with the CRM side of Act! which was obviously going to make life a whole lot easier."

"We've been using Act! Marketing Automation now for maybe 12 email marketing campaigns and during that time it's done exactly what we needed it to, whether that's sending a one-time email blast to all the procurement agents in the state of Delaware, or something more targeted that's involved using specific fields to 'slice and dice' our database into end-users, resellers and architects."

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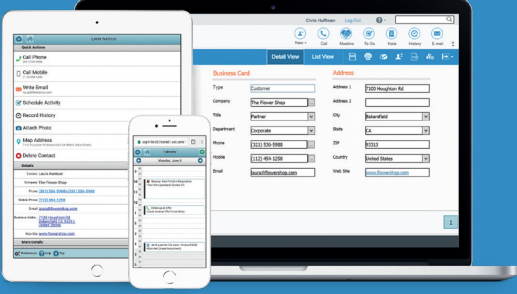>
> **Alex Kramer**
> Co-founder

The value of an Act! Channel Partner

As Alex and his team are comfortable with technology, they do any changes to fields or templates in-house, though they also make good use of the online training videos Act! Marketing Automation as needed. "They've proven extremely useful," says Alex, but he does admit that calling on the experience of an Act! Channel Partner might have helped them avoid a lot of frustration when trying to get the balance right between Act! and the other two applications.

"If someone had been around to show us how to do that faster and more easily, then that would have been massively useful knowledge," says Alex.

Results

- Like most small companies, Navi Solutions wants to make the most of its available resources. By using technology like Act! and Act! Marketing Automation the company can punch above its weight.

- When you create a system using multiple applications, it makes sense to use Act! as the hub because it contains all core information about customers and suppliers.

- Bringing in an Act! Channel Partner is an obvious step for companies wanting to customise Act!. However, even for those who are comfortable making changes to the application in-house, the experience and expertise of an Act! Channel Partner can be invaluable when it comes to avoiding problems and making systems run smoother.

- If you are already using Act! as your CRM, then upgrading to Act! Growth Suite is the most effective and seamless way to introduce marketing automation into your business.

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