



Act! makes connecting and engaging with clients seamless for Plan B and C, inc.



Since 2019, Plan B and C, inc. has sought Corporate Refugees in the form of executives and investors looking to explore the benefits of business ownership. Headquartered just outside of Boston, Massachusetts, the brokerage firm specialises in identifying and aligning clients with strategic income opportunities focused on small and medium-sized business (SMB) investments and acquisitions.

“From my early days as a brokerage consultant to now, Act! has always helped simplify finding, connecting, and building relationships with clients. As Act!’s features continue to evolve, so do I—learning new ways to leverage the software to provide better service to my clients.”

Matt Agnese
President, Plan B and C, inc.

Though considered a relative newcomer to the brokerage market, Plan B and C, inc.’s executive team comes equipped with nearly 20 years of knowledge and experience in entrepreneurial and corporate consulting success. While the company’s expertise revolves around the mentoring and coaching of clients through business ownership, Plan B and C, inc. understood that building and maintaining strong sales pipelines and customer relationships were critical to business success. With a breadth of positive experiences working with Act! products in past endeavors, Plan B and C, inc. leadership immediately implemented its software into its tech stack.

Building Stronger Relationships with Act!

As a pipeline business, the ability to move candidates efficiently from identification through the investment project and ultimately to conclusion requires intensive study and attentiveness, and Act! is Plan B and C, inc.’s source of truth for each stage

of the consultation process. Act!'s customer management features centralise all of Plan B and C, inc.'s client data on a single platform. The ability to segment and easily access client data on the Act! platforms help users quickly and accurately identify where a client is in their journey and important insights to provide a more engaging interaction—while eliminating the time wasted digging through call notes for information.

Act!'s marketing automation tool has also been key in identifying and maintaining healthy communication with Plan B and C, inc.'s clients and prospects. As a small business organisation, the capability to create and disperse mass email marketing campaigns in a fraction of the time and with fewer resources has been vital to the company's success.

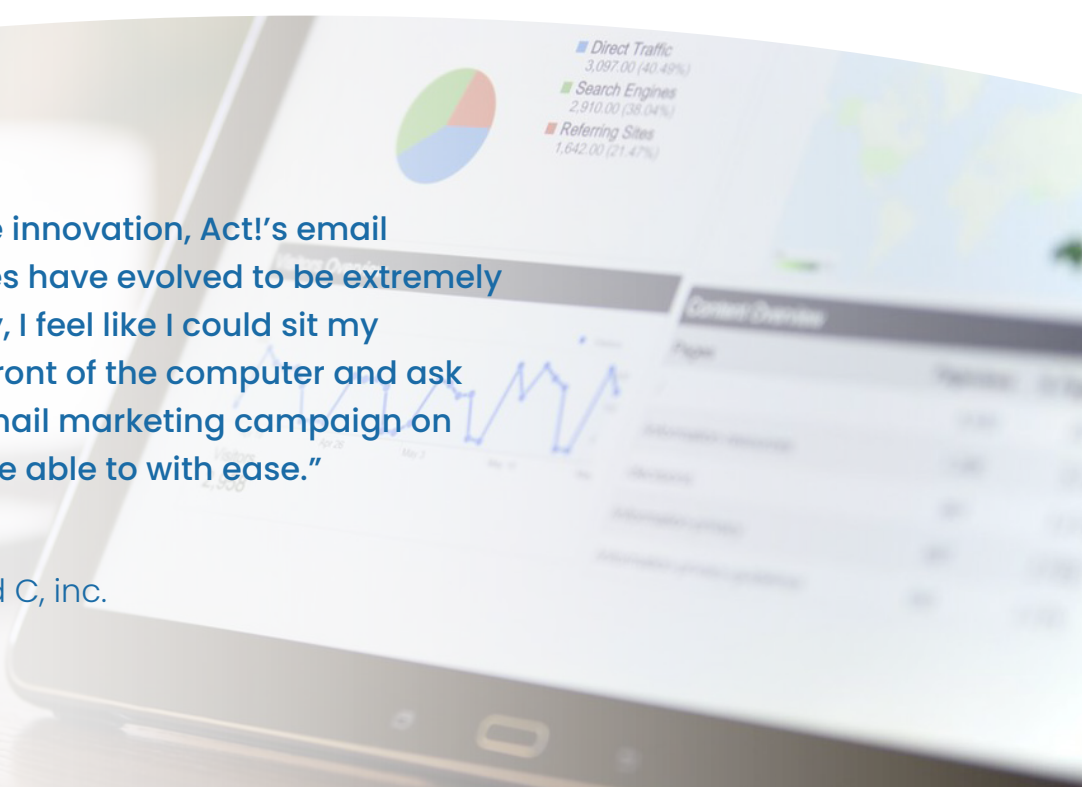
By leveraging Act!'s automated workflows, Plan B and C, inc. has been able to mitigate missed opportunities and overlooked candidates. With Act!, the firm can preemptively create outreach strategies for marketing campaigns. So, if a prospect engages with a CTA within an email, a predefined response can be queued up and automatically delivered to that prospect. The company has also used Act!'s automated alerts to remember important dates, like birthdays and holidays, to improve customer relationships. After all, every client deserves a birthday email.

Increasing Conversion Rates & Cutting Costs Through Powerful, Intuitive Features

Combining Act!'s customer management with its robust suite of marketing automation tools has increased outreach, improved conversion rates, and cut costs for the company. Thanks to Act!'s highly intuitive, user-friendly platform, Plan B and C, inc. no longer has to outsource campaign design projects to third-party vendors. Act!'s fully customisable campaign templates equip even the most novice designer with the tools and capabilities to create professional-grade, personalised, on-brand emails, landing pages, videos, web forms, and more with ease—and automatically formats them for phone and mobile devices. By being more hands-on with design processes, Plan B and C, inc. has been able to leverage its wealth of client information and various testing methodologies to take a more intimate and strategic approach to marketing designs.

Looking Ahead: Scaling with Act!

Act!'s highly integrative technology has enabled Plan B and C, inc. to connect Act! with most of the software within its tech stack, including QuickBooks, Gmail, Calendly, Adobe Suites, and



“Through its software innovation, Act!'s email marketing templates have evolved to be extremely user-friendly. Today, I feel like I could sit my 10-year-old son in front of the computer and ask him to design an email marketing campaign on Act! and he would be able to with ease.”

Matt Agnese

President, Plan B and C, inc.

more. The synergy created through software integration has streamlined processes, sped up response times, and enabled users to quickly reference, compare and share client information at the click of a button. The enhanced operational performance fueled by Act! has allowed this small business to take on anywhere between five to 10 clients at once while performing outreach to more than 25 prospective candidates weekly.

And Plan B and C, inc. has no plans for slowing down. Now in its third year, the company looks to establish a more significant market presence with the help of Act!. In 2023, the firm will look to partner with contractors and businesses that align with its business’s mission. And, thanks to Act!, Plan B and C, inc. can guarantee seamless integration with new partners—as it works to help as many clients as possible find financial freedom outside of their 9-5 jobs—through strategic business investments. Learn more about Plan B and C, inc. here.

About Act!

With proven CRM and powerful Marketing Automation, the possibilities are limitless. Act! provides the ultimate toolset to build relationships, maximise engagement, and drive business growth.

Contact Act!

United Kingdom: **0845 268 0220**
 Australia: **39 111 0500**
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 Switzerland: **043 508 2364**
 Germany: **069 643 508 433**

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 Belgium: **078 483 840**
 New Zealand: **0800 443 163**



Results

- Act!’s customer management software gives Plan B and C, inc. a centralised view of its entire client database, allowing users to quickly identify where clients are in their journey and access important information prior to customer engagement.
- The marketing automation capabilities of Act! enable Plan B and C, inc. to generate and disperse mass email marketing campaigns at scale, with fewer resources, and in a fraction of the time.
- Act!’s intuitive design and customisation lets Plan B and C, inc. be more hands-on when it comes to marketing campaigns, allowing them to design like a pro while leveraging relevant data to be more intimate and strategic in their design approach.
- The enhanced operational performance provided by Act! lets the small C-Corp business take on anywhere between five to 10 clients at once while performing outreach to more than 25 prospective candidates weekly.

