It wasn’t until they started using a different CRM system that this leading provider of on-site influenza vaccination clinics discovered Act! really had been the answer to its sales and relationship requirements all along.

“OccuVAX now has the powerful CRM tool it needed and which was actually in its hands all along. “It wasn’t that Act! was wrong for us, it was just that we weren’t using it properly.”

Tina Coleman
Director of Sales and Operations at Occuvax

Switched right back to Act! … but with one difference. This time they sought out the help they needed to get the most out of the software.

“It wasn’t that Act! was wrong for us,” says Tina, “it was just that we weren’t using it properly.”

Accuracy of medical data

To make sure Act! would work for them in future, OccuVAX called in a local Act! Certified Consultant to help upgrade and to ensure that Act! was tailored to their needs.

This time round, they are really employing it to the full, with one sales team tracking potential new business and another following up on opportunities with existing customers.
A third team uses Act! to manage the company's relationships with over 25,000 nurses. It holds all their contact details but also a history of their work with the company, as well as the most up-to-the-minute information about their medical licences, and a system for rating their performance. And by connecting to nurses’ LinkedIn profiles, images of individual nurses are pulled in, so the team can ‘put faces to names’.

Management time slashed
The benefits of using Act! properly have been “huge”, according to Tina, with management time slashed by 20 hours or so each week. Not only that, but Tina has also saved over ten hours a month preparing for her three weekly management meetings, with Act!’s reports replacing the time-consuming spreadsheets she once used to manage all the information she needed.

“With Act!, we’ve also cut back on the creation of unnecessary information and the potential for duplication,” says Tina, “so we have a cleaner, more accurate database.”

The best decision
“We feel very secure in our decision to go back to Act!,” says Tina “and our great relationship with Cindy means we get the most from it. And the training she gives me I pass on to others, so we can continue to do things independently.” Obviously Tina’s a good teacher herself, because she’s able to get new users up and running in just 30 minutes. “We’ve got it down to a science.”

And with plans to use Act! more and more for e-marketing, OccuVAX now has the powerful CRM tool it needed and which was actually in its hands all along. And given the importance of protecting so many from flu, that’s not to be sneezed at.