

Act! - injects new life into CRM

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[®]

Flu costs millions of hours in lost productivity each year, so many companies use specialist providers, like OccuVAX, to vaccinate their staff against it.

Working across all US states, OccuVAX takes on the whole process of running on-site vaccination clinics, from scheduling appointments through to providing the vaccine and the nurses to inject it.

Back in 2005, the company identified the need for reliable CRM software and soon alighted on Act!. "But we never seemed to get the most from it" says Tina Coleman, OccuVAX's Director of Sales and Operations.

So, two years ago, the company decided to switch to Salesforce.

Rediscovering Act!'s potential

"Within two months we realised we'd made a big mistake," says Tina. "It was so non-user-friendly. There were so many clicks. So many tabs. We estimated we might have to have 16 different screens open for just one transaction!"

So despite the considerable time, effort and money they had already invested in Salesforce, OccuVAX

"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.

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Results



With Act! reinstalled as its CRM software of choice, OccuVAX has been able to:

- **Dramatically increase** the user-friendliness of its CRM system.
- **Speed up** individual 'transactions' so that the overall productivity of all teams is **much improved.**
- **Cut 20 hours** and more from weekly management time.
- Make new staff **immediately more productive** by training them to use Act! in just **half an hour.**
- Reduce the time needed to produce management reports by **10 hours a month.**
- Much more effectively manage the database of **25,000 nurses**, whose details and licences are constantly being updated.

act!