Act! in the cloud holds the key to ‘competitive collaboration’

Act! is well known for the productivity improvements it brings to businesses. However, by switching from a desktop to a cloud-based version, this firm of commercial real estate consultants discovered that it made their business better by enabling much greater collaboration among their team.

“We chose Act! in the first place because we wanted a CRM that would help us to better understand, track and qualify our prospects and clients, but without having to wade through all of the non-essential features,” says MGA’s managing principal, Brian Pashkoff. “Act! lets us do that, which is why we chose it over other products from Microsoft and Salesforce.”

As a commercial real estate firm based in Washington DC, MGA, Inc. helps organisations develop and implement real estate strategies.

Its clients include non-profits, associations, legal practices and government contractors, as well as financial service firms and technology companies, and over the years the company has built a rich database of contacts, which it has managed and added to by using Act!.
No duplicated effort

This could lead to duplicated effort, with different members of the six-strong team talking to the same person about the same deal. "That doesn't seem like a good use of time to me," says Brian.

So MGA decided to switch to a cloud-based version of Act!. This would give everyone access to a central database where every contact was being updated in real-time.

That made everyone immediately much more efficient and productive, because they could focus their activity with no overlap of effort.

"And making the switch between the two systems was no problem at all says Brian, "as everyone was already very familiar with Act!.

"We split prospects into groups, who are then approached by different members of the team," says Brian.

That is not only more productive, but also avoids the possibility of irritating potential clients through multiple or repeat calls.

The cloud-based version of Act! is fostering a more collaborative environment. Now, if someone notices someone else speaking with or tracking a potential client and they have some good insider information, they share it."

Brian Pashkoff
Managing Principal
Much greater collaboration

But it is in another area that there has been the biggest change… collaboration. "That’s where switching to the cloud has made a significant difference," says Brian.

"When you have separate databases it creates a potential rat race. So the desktop version made everyone overly competitive. We want our people to be competitive of course, but we don’t want them feeding off each other. So information didn’t get passed or shared around so much," says Brian.

"Now, if someone notices someone else speaking with or tracking a potential client and they have some good insider information, they share it. So Act! in the cloud is fostering a more collaborative, but still competitive environment."

Results

• Act! has significantly improved collaboration within the business. Now information about clients and deals is shared and there is no duplication of effort.

• MGA chose Act! because they wanted a CRM that would enable them to understand a client’s situation and track progress of deals without getting distracted by unnecessary, non-essential features.

• The similarity between the desktop and cloud versions meant that switching between the two was problem-free because everyone was already familiar with Act! and how it works.