



act!™

# Act! CRM customer adds Act! Marketing Automation – saves precious time, increases sales and improves ROI on marketing efforts

With a range of customers across many industries, this Canadian instrumentation distributor needs to make sure it's always sending the right message to the right people, and it relies on Act! to do that.



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**Mark Reid**

Owner and V.P., Sales & Marketing

## Ontario-based company techniCAL Systems 2002 Inc. distributes measurement, calibration and recording instrumentation to multiple markets across Canada.

Its customers range from public utilities, government departments, defense and aerospace companies, through to pharmaceutical and petrochemical firms, and even schools and colleges. As the company's co-owner Mark Reid puts it: “Essentially we sell to anyone who needs to measure, monitor or control a process.”

The company also repairs equipment and offers training support. It's this comprehensiveness that sets techniCAL apart from its competitors and has helped turn it into a market leader.

But such a diversity of products and services also demands that techniCAL can deliver a wide variety of marketing messages, which is where Act! comes in.

### **Act! – an indispensable instrument rest**

Some 30 years ago, Mark switched CRMs from Maximizer to Act! and he's been a fan ever since. In fact, he admits that he “couldn't survive without Act!” So, when setting up techniCAL back in 2000, he made sure that Act! was a key component of the company's business systems right from the start.

He particularly likes the way Act! integrates with third-party applications like the ones he uses for quoting and invoicing. "That means I'm not having to re-enter information between different applications, which is a massive time saving," says Mark. "It also means I don't have to worry about accidentally introducing errors, which can happen if you're having to do things twice."

To make sure the company is delivering the highest levels of customer service, Mark has customised Act! heavily. "We need to be able to respond to each customer in the best way possible depending on who they are and how they interact with us. So, we have set up the system to quickly handle different types of customers. That means when someone calls we know immediately, for instance, whether they are a pharmaceutical, paper or petrochemical firm, and we can go straight to information about the specific manufacturers that matter to them."

As part of the customisation, Mark is more than happy to roll up his sleeves and add in new product lines to Act! or take out old ones, "which is very easy do with Act!." When it comes to new installations, Mark calls in Act! Channel Partner Keystroke, "who are very helpful, so upgrades are pretty seamless."

## New opportunities with marketing automation

Given his successful long-term experience using Act! as a CRM, it made sense for Mark to start using Act! Marketing Automation for business building.

"Since we cover so many different industries," says Mark, "we need to be careful we're sending customers information that's specific and relevant to them. We don't want to email anything about food processing to an automotive supplier, for instance, and with Act! Marketing Automation we can make sure that doesn't happen."

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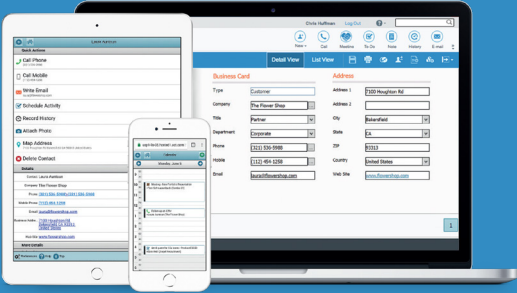


## New opportunities with marketing automation (continued)

“Because it’s simple to query Act!, we’re able to identify potential buyers very accurately and then send them a customised communication, whether that’s a press release, a product update, or more of an email broadcast to a particular industry.”

This all helps to improve customer experience and deliver better service. “So, though we’re a small company,” says Mark, “our revenue is relatively high compared to our number of employees, and Act! is one of the reasons for that.”

“Act! Marketing Automation has really streamlined the efficiency of how we get new sales,” says Mark, “so not only does it save us a lot of time, but it also gives us a much better return on our marketing efforts. And because we’re using Act! Marketing Automation to segment our database by industry, it means we aren’t mailing to all our contacts at one time. That makes it easier to update customer information in a manageable way as we cycle through the product lines and markets we’re interested in, which means our database stays cleaner.”



## Results

- Act!’s ability to interface with third-party quoting and financial applications has given the business the flexibility to create the integrated system it wanted and needed.
- To ensure customer information is as up-to-date as possible when he’s on the road, Mark uses Handheld Contact to update customer information remotely in Act! without having to go back to the office or calling someone there to do it for him.
- When data decay can reach 70% per year in some high turnover B2B markets, Act! Marketing Automation can help keep your database cleaner, as it does for Mark.

## Contact Act!

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