



Act! provides a simple, intuitive, and logical CRM solution for INEX



inex | 20 YEARS

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Corrine Bryson
INEX Founder and CEO

Based in Ottawa, Ontario, INEX has helped deathcare professionals build generational relationships since 2000. Today, the company provides a range of preparedness tools that simplify family estate planning, and its customers include independently owned funeral homes, cemeteries, and hospice organizations across Canada and the U.S.

INEX offerings include “In Case of Emergency,” a toolkit that helps families assemble all of their critical

documents in one place to help ease decision-making during critical times. In addition, their “Closing Affairs” toolkit provides a comprehensive source of information to guide executors through the long and complex process of settling an estate. To ease the pain of loss, INEX also provides soft, huggable Comfort Bears and also produces and sells “Professional Processions,” a line of items that increase the safety and visibility of funeral processions.

Act! supports business continuity across a remote workforce

Since the company’s founding, INEX has relied on Act! CRM and Act! Marketing Automation (AMA) to manage client accounts, email campaigns, newsletter blasts, project timelines, and more. Most recently, Act! provided a critical platform for supporting business continuity during the COVID-19 pandemic. For more than a year, the company’s entire team of sales executives, marketing specialists,

logistics personnel, and digital experts worked remotely, and they needed a way to keep business operations running without interruption.

“Act! has been our lifeblood for more than 20 years – we rely on it for everything,” said Corinne Bryson, INEX Founder and CEO. “During the pandemic, when our entire team worked remotely, we used Act! for more than just marketing and contact management. It has enabled us to collaborate seamlessly by giving us the ability to see what’s on everyone’s calendar and task list on any given day. If there are any questions, we just go to Act! and all the information we need is there, so we can answer our own questions without needing to send an additional email or follow up with a phone call,” she said.

Act! helps centralise data and streamline business operations

Although the INEX team was already highly experienced with Act!, they decided to reach out to their Act! Certified Consultant, Keystroke.ca to leverage additional training and customisation to use the platform to its fullest potential. With assistance from Keystroke.ca, INEX completely centralised and improved the quality of their sales and marketing data. For instance, they could better manage customer contact information and avoid duplicate or inaccurate data entries.

Today, with high-quality data and a customized interface, INEX account reps can target marketing communications to specific customer segments.

For instance, they can schedule a check-in call with a current customer every two months, or follow up on new opportunities or leads after a predetermined period of time. Most importantly, employees are able to provide relevant offers and updates to customers based on their specific attributes and needs. They can also follow up on a regular basis to deliver the best customer service and convert more leads to customers.

“The main concern for INEX was ensuring data integrity,” said Michael Kadlub, Support Manager at Keystroke.ca. “Once they learned about all of the automation capabilities in Act!, they were really able to take their business operations to the next level,” said Kadlub.

Access to high-value customer data delivers better business value

INEX was able to fully integrate their email platforms and create a uniform client onboarding system. This new system ensures that every new customer and lead is entered through a standardised process that captures detailed client data, including contact information, purchase history, account notes, customer conversations, and more. As a result, the new system enables any employee to view the entire history of a prospect or customer so they can provide the best customer service and communication – all without having any prior knowledge of the account.

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“For us, Act! is like having a digital filing cabinet where we can store every interaction and customer account update,” said Bryson. “That way, if a new employee joins the company, the previous account owner doesn’t have to spend time explaining all of the accounts. Act! is just simple, intuitive, and logical, so anyone can start using it right away.”

Act! helps INEX increase revenue and new client acquisition

With Act! Marketing Automation (AMA), INEX now has the right operational systems in place to deliver customized communications to new customers. This has enabled the company to expand its customer base to include financial planners who want to offer INEX pre-planning toolkits as value-added offerings to current and potential customers. Hospice organizations are another expanding market eager to provide these toolkits for end-of-life assistance to families. With AMA, INEX sales reps can create customized email campaigns for these and other target markets depending on their industry, geography, and needs.

“The ability to segment by attributes such as company affiliation and geography has been extremely helpful for our marketing initiatives,” said Mike Burnett, Vice President of Sales for INEX. “For example, we might want to direct our offerings to the person in charge of pre-planning in U.S.-based financial services companies, or offer go-to-market tools such as videos, PDFs,

and presentations to help Canada-based funeral directors offer estate planning services to families. With AMA, we can create all of these highly customized and automated campaigns and schedule them to go out weekly, bi-weekly, or as needed. More importantly, it helps us ensure we’re reaching the right audience with the right offerings and message so we can continue to nurture that relationship,” he said.

Real tech support from real people makes all the difference

According to the INEX team, one of the biggest differences between Act! and other platforms is ease-of-use. However, when questions or issues do arise, Act! tech support is just a phone call away.

“I’ve used many different CRM platforms over the years, and AMA is by far the easiest and most intuitive CRM software I’ve used,” said Burnett. “But inevitably questions and problems come up. With other software tech support, you can spend hours trying to get through to a real person. Then, when you finally do, they tell you to go watch a video tutorial. With Act!, help is just a phone call away. I’ve literally had a tech support person remotely view and control my screen to instantly fix a problem I was having. I’ve never had that kind of support from another CRM provider.”

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Looking ahead: Increasing revenue and new client acquisition

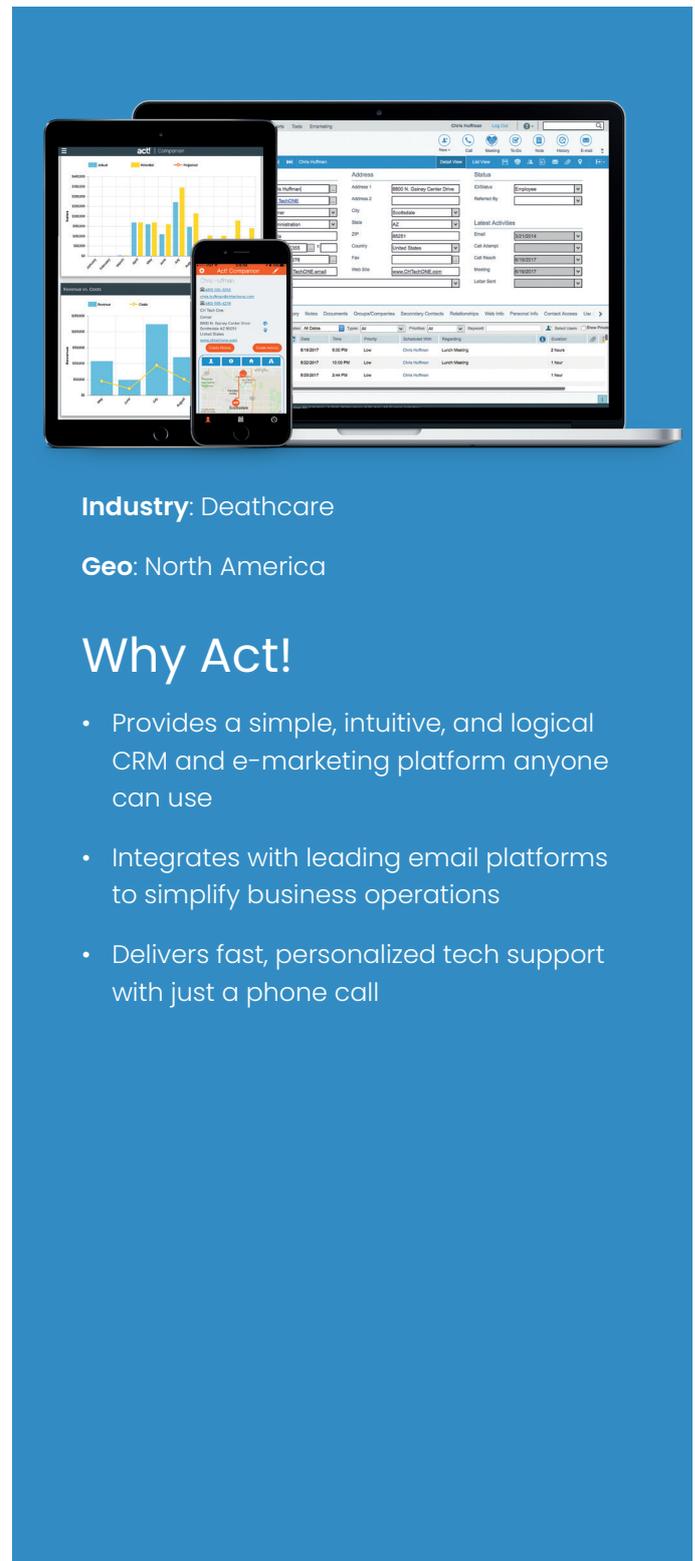
For INEX, the future is all about continuing to build its customer base and increase revenue. To do that, the team is using Act! in innovative new ways.

“Although Act! isn’t technically a project management platform, that’s really how we’re starting to use it,” said Bryson. “It enables us to see any corporate project in the works. We can see who’s working on it as well as all of the moving parts. It instantly gives us the visibility to better track milestones, dates, and goals so we can make sure we’re hitting them. Act! is really a powerful platform that’s become the foundational piece of how we’re managing our company today and going forward.”

INEX relies on Act! CRM and Act! Marketing Automation (AMA) to manage client accounts, contact information, email campaigns, newsletter blasts, project timelines, and more. With Act!, INEX creates highly customized, targeted, and automated communications that reach the right audience with the right offerings and message to help nurture customer relationships, grow the business, and increase revenue.

Key Benefits

- Ensure business continuity and collaboration across a remote workforce.
- Easily manage and access high-value customer data.
- Quickly create and schedule email campaigns that target highly specific customer segments.



Industry: Deathcare

Geo: North America

Why Act!

- Provides a simple, intuitive, and logical CRM and e-marketing platform anyone can use
- Integrates with leading email platforms to simplify business operations
- Delivers fast, personalized tech support with just a phone call

What is Act!?

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

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