



# How Act! CRM Became an Indispensable Tool for a Consultant's Success

**Jeryll Adler shares how Act! transformed her ability to organize, build relationships, and create archives of invaluable information throughout her multifaceted career.**

## From Chaos to Structure: A Consultant's Journey

For Jeryll Adler, being a consultant meant constantly adapting to new roles, clients, and challenges. "I've primarily been a consultant, working in various roles from sales and marketing to producing and advising nonprofits," she explains. While she always had a knack for imposing structure onto chaos, Adler credits Act! CRM software with transforming her workflow. "A friend recommended Act! years ago, letting me know that it would improve my prospect and contact management."

## The Power of a Digital Archive

Act! quickly became her digital archive—more than just a database, it was a living record of every relationship and project.



“What I really needed was quick access to all the different information that I was working with,” Adler says. “Act! allowed me to create a digital archive that was comprehensive. I could see who I needed to talk to, when I needed to talk to them, and why,” she explains. “It wasn’t just about sales—it was about building genuine relationships that went beyond asking for something.”

*Jeryll Adler*

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## Using Act! as a Relationship Builder

Jeryll's philosophy of relationship-building was central to her consulting success. She explains: “One of the things I learned early on was that I couldn't build relationships only when I wanted something.” Act! helped her manage this approach. She used the scheduling tool to track conversations, set reminders for follow-ups, and differentiate between personal and business contexts. “I would create files that told me how frequently to be in touch with clients, and what the last conversation was about,” she shares. “It made me the person clients trusted because I remembered everything—deadlines, details, and even personal milestones.”



## Key Takeaways:

- **Structure Meets Flexibility:**

Act! offered Jeryll the structure she craved while being flexible enough to support her diverse consulting roles.

- **Beyond Sales:**

The software became more than a CRM; it was a tool for authentic relationship-building and client trust.

- **A Historical Archive:**

Act! gave Jeryll the power to create a comprehensive digital archive that spans decades of business and personal history.

- **Versatile Application Across Industries:**

Jeryll's extensive use of Act! across her consulting work, nonprofit projects, and even her creative endeavors demonstrates how the software's flexible framework supports diverse professional and personal needs.

# About Act!

## More than CRM. Your total relationship solution.

Act! unites sales, marketing, and customer management in one intuitive platform to help you stay organized, attract new customers, and turn relationships into results.

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