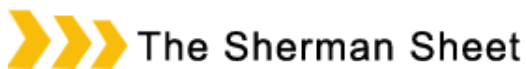


# The Sherman Sheet uses Act! to create highly customised financial services campaigns



“The AMA platform has helped us simplify our marketing communication processes because it’s so easy to customise and update.”

**Gordon Case**

Director of Sales and Marketing

The Sherman Sheet is a financial services company whose clients include money management firms, individual investment advisors, and brokers across the US and Canada. Based in St. Louis, MO, The Sherman Sheet offers a subscription service that provides access to leading financial research, financial models, and custom portfolio reports to help advisors strategically manage their client accounts.

The Sherman Sheet initially grew its client base by contacting potential clients directly through personal referrals and contacts. However, as demand for the company’s market analysis services increased, the team needed more efficient and automated ways to communicate with existing and prospective clients. As a result, The Sherman Sheet chose the Act! Marketing Automation (AMA) platform to help automate communication across the customer lifecycle.

## **Act! supports exponential company growth**

“Over the past decade, our company has grown exponentially, from about 50 to more than 1,500 clients,” said Gordon Case, Director of Sales and Marketing at The Sherman Sheet. “Much of that growth has come by word of mouth, but as we’ve grown, our team needed a more scalable and automated way to keep clients informed. Our research service provides market indicators, models,

tools, reports, and video tutorials — so many that it's easy for our clients to forget everything we provide. The AMA platform has helped us simplify our marketing communication processes because it's so easy to customise and update. We've been able to create more than 75 custom AMA fields, which helps us easily target current and prospective clients with tools and information most relevant to their areas of interest."

The Sherman Sheet specifically uses AMA to create highly customised email campaigns, often running up to 12 campaigns simultaneously. These campaigns are segmented to reach current paid clients, prospective clients in the midst of their 30-day free trial, and those who completed a 30-day trial. Campaigns to current paid clients remind them of the various models, tools, reports, and video tutorials they may not be utilizing, as well as reminders to join weekly live webinars. Clients in the middle of a 30-day free trial receive a sequence of 13 emails that provide a brief overview of various tools and reports they'll receive as a paid subscriber. As prospects approach the end of the trial, the campaign focuses heavily on converting them to a paid subscription. If a prospective client doesn't convert by the end of the 30-day trial, another campaign automatically sends a follow-up email seven days later.

## Personalisation is key

"In our business, personalisation is key. With the ability to create personalised email campaigns, our clients know that we understand their business. We especially appreciate that AMA enables us to include the client's name in the salutation, so emails don't appear as a generic blast email," said Case. "We can also use AMA to track every customer touch as well as notes and conversations. So for us, AMA is like having a complete CRM solution that helps us manage the entire customer pipeline, from the day they start the 30-day trial to conversion and beyond."

## Partnering for success with Project Technology Consulting

The Sherman Sheet works directly with Project Technology Consulting, an Act! partner that helps to maintain and optimize the AMA platform. According to Louise Wiedermann, owner and Act! Software Certified Consultant, "The Sherman Sheet has been able to achieve incredible results with the level of campaign customisation they use to target customers with relevant communication and offers. The AMA platform is so easy to customise, which enables them to focus more time on delivering powerful market research and less on the need for tech support or backend integrations."



“ I'd say the main advantage of AMA is how much time we're able to save.”

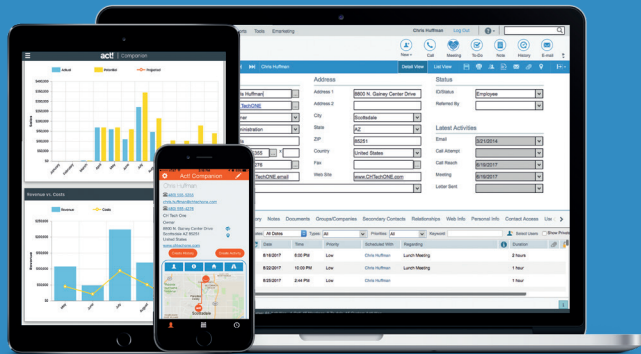
**Gordon Case**

Director of Sales and Marketing

"I'd say the main advantage of AMA is how much time we're able to save," said Case. "We can easily customise any email campaign using our templates and quickly add new fields to the dashboard. That's not something you can do with an Excel spreadsheet. I can see how smaller businesses may assume that marketing automation products are too complicated to implement, but that's not the case for us. AMA gives us more time to focus on serving our clients and growing our business."

## Key Benefits

- Build personalised customer relationships by easily customising campaigns based on criteria such as geography, customer history, and more.
- Focus more time on supporting core business goals, such as delivering top market research and customised investment reports.
- Easily track and manage customer account details, including notes and conversations.



**Industry:** Financial Services

**Geo:** North America

**Products / Features:** Act! Marketing Automation

## Why Act!

- Provide a complete CRM solution to help drive and track customer conversions.
- Reduce time-consuming manual data entry and updates.
- Save time with automated and simplified marketing capabilities.

## Why Project Technology Consulting

- Provide best-practice technical and strategic support for the AMA platform.
- Serve as the main point of contact to advise on key AMA features and new capabilities.
- Offer customised needs analysis and training.

## Contact

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