



Rate Your Need for a Contact & Customer  
Management Solution

## Table of Contents

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Introduction.....	3
Time to Re-evaluate Your Day-to-Day Processes.....	3
Definition of Terms.....	3
What is a Personal Information Manager (PIM)? .....	4
What is a Contact & Customer Manager? .....	4
The Seven Essential Questions .....	6
Concerned because you “live” in Microsoft Outlook? .....	10
Conclusion .....	10

## Introduction

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Business is booming. You're in cycle with an impressive number of customers and prospects, and you manage to keep them all quite happy. But, what if you could achieve even greater success without working harder? Even better, what if you could be more productive, while actually working less?

It requires a lot of effort to manage clients via a mix of e-mails, contact information, documents, spreadsheets, and notes. It's time-consuming and sometimes confusing. You strain to remember things that happened weeks ago. You're forced to gather a bunch of separate documents and handwritten notes or collect information from people on your team every time you head out the door to meet with customers.

How much time and effort would you save if you could keep all of your customer information in one easy-to-access place? Would that enable you to spend more time actually doing business and less time managing it?

Many software vendors claim to possess the key to enabling this possibility. You've heard plenty of buzz about what contact managers, CRM solutions, and other software solutions can do for you. But, how do you know the differences between offerings? Most importantly, how can you be sure that software can solve your business management challenges in the first place?

## Time to Re-evaluate Your Day-to-Day Processes

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This paper is intended for individuals that are currently using paper-based records, written notes, spreadsheets, or a personal information manager (PIM), such as Microsoft Outlook, to manage their business. The purpose of this paper is to help you to determine if there is a better way of managing your contacts and customers and performing day-to-day business tasks.

In particular, this paper highlights the differences between contact and customer management and a PIM by asking you to consider seven essential questions. Answering yes to even one of them means that your business could benefit from transitioning to a contact and customer management solution.

## Definition of Terms

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Before determining whether your business will benefit from contact and customer management, it's critical to understand what that term really means. You'll also need to know the difference between a contact and customer manager and a PIM because you may be using one of these solutions today without knowing that it falls into a particular technology category. Clarifying these terms upfront, and explaining what each solution can and cannot do, will make it easier for you to correctly assess what's best for your business.

## What is a Personal Information Manager (PIM)?

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PIMs, such as Microsoft Outlook, were designed to help you organise basic personal information. They typically include an address book, calendar, and to-do list, mimicking the paper-based format of each. PIMs enable you to maintain your personal information, as well as basic information about contacts, but do not allow you to integrate information such as linking documents or e-mail communications to a contact.

Some PIMs provide basic contact tracking and searching functionality. For example, a PIM may offer the ability to attach notes to a contact, but it would not provide a historical view of that relationship. Piecing together relationship histories with a PIM would require a great deal of time and patience, plus supplemental applications (such as spreadsheets or other documentation).


## What is a Contact & Customer Manager?

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A contact and customer manager allows you to manage all tasks and information related to developing and maintaining relationships with the people, groups, and companies with whom you do business.

Contact and customer management involves a variety of activities, including the ability to:

- Centralise critical contact and customer information and stay organised.
- Manage and grow business relationships through top-notch communications.
- Prioritise your work to stay on top of appointments and tasks.
- Forecast and track sales opportunities for an improved bottom line.
- Access and report on information quickly for a complete view of customer interactions.
- Improve efficiency by integrating the applications you use every day, such as Microsoft Office, accounting applications such as MYOB® and QuickBooks® and business tools such as DropBox and iCloud®.
- Access critical information on-the-go from your iPad, iPhone or Android device plus Internet Explorer and Google Chrome (Premium only)



*A contact and customer manager allows you to manage all tasks and information related to developing and maintaining relationships with the people, groups, and companies with whom you do business.*

Built on the foundation of a contact-centered database, contact and customer management software provides comprehensive tracking and instant access to all contact-related information. It's intuitively designed for the day-to-day management of contact information by an individual, workgroup, or corporate team.

## Silos of Information



A major difference between PIMs and contact and customer management is that PIMs contain isolated (as opposed to integrated) components. For example, in a PIM you might look at a calendar appointment in one view, and then separately reference your contact list for details about the person you're meeting.

Contact and customer management provides a 360-degree view of your contact information so you don't have to jump from one application to another to complete a task, plan your day, or execute your sales strategies.



Contact and customer management software is a tool to improve the way you build and maintain business relationships and enhance your professional image. It empowers you to focus on profitable endeavors, such as outshining your competition, by minimising the time spent on routine tasks. It's an essential tool for consistently transforming contacts into customers and first-time customers into loyal relationships.

*A full-featured contact and customer management solution provides a 360-degree view of all the critical information you have about your contacts in a single, integrated application.*

## The Seven Essential Questions

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Now that you're clear on what a contact and customer management solution does and how it differs from a PIM, it's time to figure out if it's the right solution for you. The following seven questions address typical "red flag" scenarios that signify a need for contact and customer management.

As stated in the introduction, if you answer yes to one or more of these questions, you are a strong candidate for contact and customer management software. To assess your current situation with the greatest accuracy, be sure to consider how your business might improve in each of the areas described as you answer each question.

Note that from this point forward, Act! will be used as the representative contact and customer management solution. Contact and customer management references specific to Act! may not apply to other contact management solutions.

**1. Have you ever wanted to organise all of your business data about a contact, customer, or company, but couldn't figure out how to neatly compile it from multiple places and applications?**

Compiling contact and customer data "under one roof" saves hours of wasted time for millions of contact and customer management users. It eliminates potential errors and the need to perform duplicate tasks. It frees you from the hassle of maintaining a contact list in one application, account history in another, e-mail communications and appointments in yet another, and keeping track of multiple documents on your hard drive.

A contact and customer manager provides a single, central repository for critical contact and customer information. It enables quick and easy access to every aspect of your prospect and customer relationships (e.g., addresses, phone numbers, e-mail, Web sites, notes, correspondence, documents, to-do items, and activities). The interface presents one consolidated view of each contact, giving you an instant overview of that relationship. With a tabbed interface design, details are just a click away. Simply click the Notes tab, for example, to view all date- and time-stamped notes on a contact or customer record.

Working with isolated information silos is not only cumbersome, it jeopardises the future of your business. When you use contact and customer management, you eliminate potential communication gaps, such as losing handwritten notes from a sales call or forgetting where you jotted your to-dos during a meeting. With a contact and customer manager, these preventable failures are far less likely to occur.

**2. Have you ever wasted time searching for a key piece of customer information or needed to retrieve exactly what you sent to a customer/prospect?**

Never waste another hour searching through paper-based systems, multiple spreadsheets, and e-mail folders. With contact and customer management, you have complete information at your fingertips. And, if you don't immediately see what you're looking for, you can perform ultra-fast database lookups, even when searching on a partial name or word. Beyond the time savings, you'll reduce your frustration by quickly determining whether the data exists.

A contact and customer manager equips you with instant access to nearly limitless notes and history for each contact, so you're never caught off-guard when a customer calls. Simply click the Notes tab, for example, to see details of your last correspondence. Did you remember to

send the proposal? You'll know precisely when you sent it by clicking the History tab, where all of your completed activities appear.

For more complex searches, you can use a Lookup or Keyword Search feature. When searching by a keyword, the Note, History, Activity, or Opportunity in which the keyword is found automatically opens and the term is highlighted so you have the exact location of the item you are looking for. You can also execute numeric lookups using ranges such as greater than or less than to find contacts that share common criteria. And, lookups can be saved as Groups. For example, you can create sales territories quickly and easily by performing a Lookup on the State field, and then saving it.

Using a contact and customer manager also means never having to frantically search through your sent e-mail again! Every interaction (including e-mail) is tracked on the contact record, so you have a history of all communication with each customer.



*With contact and customer management, you have complete information at your fingertips.*

Although most PIMs offer some kind of search capability, the functionality tends to be limited. Also, when using a PIM, you're forced to search through it and other applications to find what you're looking for. With contact and customer management, you consolidate all contact data into a single database to enable speedy, comprehensive searches.

### **3. Have you ever wished you had a personal assistant who kept you informed of every upcoming appointment, important date, and task?**

Staying on top of your appointments and to-dos is a surefire way to impress customers, expedite sales, and reduce personal stress. Contact and customer management takes the pressure out of managing your daily responsibilities – appointments, calls, to-dos, etc. – so that you can focus on the task at hand, instead of worrying about what's coming next.

Using a Task List View, you can filter your calls, meetings, and to-do items by priority, date range, or user, and display totals for each activity type. Activity Alarms provide extra protection against missing a deadline by reminding you of deliverables and automatically pushing incomplete activities to the next day so nothing slips through the cracks.

You can view and print your schedule by day, week, work week, month, or multiple months, and set reminders for important events. You can even maintain your schedule when you're out of the office. Print up to 20 calendar formats including Day-Timer® and Day Runner®, and easily synchronise with iPad, iPhone, Blackberry and Android using HandHeld Contact (HHC).<sup>1</sup>

Contact and customer management enables you to add a personal touch to your business relationships by reminding you of birthdays and other key dates. Also, to make sure customers don't fall out of touch, you can perform a Contact Activity Lookup to see who hasn't been contacted in a while. In essence, the software serves as your "personal assistant" who keeps you on top of your schedule and helps you extend the personal touches that keep customers loyal.

<sup>1</sup> HHC is a yearly subscription third party product which is designed for Act!

**4. Have you ever wanted an automated way to create and deliver customer communications, instead of spending hours or days creating them individually?**

*Gaining flexibility in the way you work enables you to do more, even when you don't have more time.*

To generate future business, you need to regularly deliver marketing materials, promotions, and other communications to your prospects and customers. Unfortunately, it takes a lot of time to build and deliver these communications by hand. And, frankly, you'd rather spend your time selling. But, you can't overlook the increased business that springs from personalised, automated communications and marketing materials. You just need a fast, easy way to get it done.

The marketing tools included in a contact and customer manager take you far beyond the one-off communications of a PIM. Using the built-in Word Processor or integrated use of Microsoft Word, you can create personalised correspondence, including mail merge letters, e-mail, envelopes, mailing labels, and document templates. For professional e-mail marketing, some contact and customer managers include customisable HTML templates and an e-mail client that works with Microsoft Outlook, Lotus Notes and Internet Mail.

As an added convenience, all correspondence is linked to each contact for a complete record of what has been sent. This is especially convenient for tracking follow-up calls and tasks, as well as the effectiveness of the mailing or e-mail.

**5. Have you ever wanted to make an application work the way you want it to work, or wished multiple applications would work together?**

Gaining flexibility in the way you work enables you to do more, even when you don't have more time. The ability to form-fit an application to your needs, as well as to integrate it with other applications, increases your productivity, efficiency, and creativity.

Out of the box, a contact and customer manager such as Act! delivers instant flexibility by conforming to the way you conduct business, rather than making you conform to it. The solution allows you to customise field labels and types, globally customise screen layouts, and even custom-tailor every view, if you desire this level of specialisation.

You can easily customise drop-down lists with standard entries that your business uses and designate field types (e.g., Yes/No, unlimited memo, and picture), so that you always capture consistent information. For even greater productivity and efficiency, modify the navigation bar and menus to support the way you like to access information and navigate within the application.

Beyond customisation, contact and customer managers provide flexibility by allowing you to integrate the solution with your other frequently used applications. Think of how much more quickly you could perform daily activities by combining contact and customer management with tools such as Microsoft Office, DropBox, and iCloud®.

Or, some organisations opt to integrate with QuickBooks® or MYOB® accounting software, so that select users can see estimates, invoices, sales, and payments from within their contact and customer manager for a complete customer view.



Integrating with popular social media services such LinkedIn® and Facebook® can help you to gain the advantage by having a timely view of your customer's needs, opinions, and points of interest so you can act swiftly with a personalised phone call or a meaningful sales offer and message.

Integrating your contact manager with Google allows you to synchronise Google Contacts and Calendar, as well as tracking email history sent from your Gmail account to any of your contacts who also exist within your database.

**6. Have you ever wished you could gain clear insight into the exact status of all current Opportunities – whether for yourself or for your team?**

Planning your sales strategy requires insight into your current pipeline. If you don't know the life cycle of a typical sale or how many opportunities exist, then you can't realistically predict and improve future sales cycles. Insight into your sales pipeline allows you to manage the right opportunities at the right time. Contact and customer management helps you know when to push harder to close deals and when to focus on adding more prospects to your pipeline. It puts you in control of your comprehensive sales strategy.

Using built-in sales opportunity tracking and forecasting tools, you can easily manage your sales pipeline by tracking each interaction with each contact in your database, from initial inquiry through close. When working an opportunity, simply click Follow-up to create a new activity for that prospect and automatically attach it to the contact record. For every contact, you can see exactly where you are in the sales cycle and more accurately predict a close date based on all prior interactions.



*Insight into your sales pipeline allows you to manage the right opportunities at the right time.*

With some contact and customer managers, you can view all opportunities at once or filter by estimated close date, sales stage, amount, probability of close, etc. You can generate instant customised quotes from any opportunity – without re-keying data. Analysing your sales pipeline couldn't be easier or more reliable; some even have an interactive graphical Sales Pipeline Report which allows you to drill down to see account details.

With very few exceptions, PIMs do not provide opportunity tracking or intelligence into your sales pipeline. If you wished to track opportunities as a typical PIM user, you would need to do so manually using an external application.

**7. Have you ever wished for a “bird's eye view” into key areas of your business?**

To perpetuate a successful business, you need access to high-level information that consolidates related data. This type of intelligence allows you to identify trends, lets you see the consistency of day- to-day operations from a distance, and makes it easy to isolate subsets of data that require separate analysis. As a result, you learn how to reproduce positive results and quickly end negative patterns.

Contact and customer management solutions gives you insight into the key areas of your business by providing standard reports including Phone Lists, Activity Reports, Referral Source, and Sales Summaries. You can also use the Report Designer to create custom reports that summarise and analyse your data according to your specific needs. For added flexibility, you can export standard and custom reports to Microsoft Excel®, HTML, PDF, or e-mail.

## Concerned because you “live” in Microsoft Outlook?

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Many organisations use Outlook as the default calendar and e-mail program, but that doesn't mean it's sufficient for managing your customer relationships. That's why Act! delivers one of the most robust integrations with Outlook\* available on the market today. With Act! you can perform key e-mail and calendaring tasks in either Act! or Outlook and ensure the data is still captured on your Act! Contact Record. Examples include using the Outlook new e-mail message form from within Act!, creating a history on the Act! Contact Record when sending an e-mail from Outlook, creating an Act! Contact from an Outlook e-mail, and synchronising your Act! and Outlook calendars to facilitate appointment scheduling with company employees not using Act!.

## Conclusion

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If your business requires only minimal, isolated contact data and the ability to schedule basic appointments and to-do items, then a PIM may be suitable. However, if you're a relationship-driven business professional, you likely answered yes to several of the Seven Essential Questions. In this case, your business needs may have evolved to require a more powerful tool to enable further growth. Now that you possess this knowledge, you can confidently explore your contact and customer management options and make an informed decision.

Because many individuals migrate to a contact manager from prior solutions, Act! offers an Import Wizard that makes it very easy to import your data from Outlook, Excel and other common formats, so you can begin working in the solution right away.

As noted earlier, Act! was used as the representative contact and customer manager for many of the scenarios described. Some features discussed may not be available in competitive products. With more than 3.2 million users and 43,000 corporate customers, Act! continues to be the market leader in contact and customer management for individuals, small businesses, workgroups, and large teams. Specifically designed to maximise user experience, Act! is an easy-to-use solution that offers a low total cost of ownership.

To learn more about what Act! can do for you, please contact us to discuss your business needs.

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