

## Sage ACT! | Customer Success



### Challenge:

Remote sales representatives were disconnected from the home office, relying on manual reports and paper records, without access to contact data in real time.

### Solution:

Sage ACT! Hosted provides remote access to a live database with industry-leading Contact and Customer Management features including robust searching and reporting, providing satellite reps nearly instantaneous updates.

### Result:

Remote reps are now connected to the home office, enjoying convenient cloud access to all client data with the rich searching, sorting and grouping features of Sage ACT! Hosted.

**Customer:**  
JDA Group

**Industry:**  
Home Furnishings

**Location:**  
San Juan Capistrano, CA

**System:**  
Sage ACT! Hosted

**Users:**  
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## JDA Group Seamlessly Connects Remote Employees to Real Time Contact Data

The JDA Group is a professional sales and marketing team that represents fine furniture and home accessory product lines across the US. They have been in business for over 20 years, enjoy a great reputation in the industry and continue to demonstrate a passion for the products and clients they serve. With over 5,000 contacts in their database, their Contact and Customer Manager is central to their success.

Even though they've used Sage ACT! for over 15 years, JDA looked at several Contact and Customer Managers to try to solve the problem of remote employee access. After looking at Salesforce.com®, Oracle®, Microsoft Dynamics® CRM and others, they came back to Sage ACT! Hosted because of the convenient hosting capabilities and flexibility of also being able to use an offline desktop version.

Jerry Dunton, Sales and Service Representative, says "Other products we considered were incomplete—with Sage ACT! you can have a desktop solution and a hosted solution, all updated in real-time."

### Quick and Cost-Effective Implementation Gets Everyone on the Same Page

For over 15 years, the JDA Group has enjoyed using Sage ACT! to manage their client data, sort and group clients, and manage their calendars. However, without adding expensive infrastructure to host their data, reps in satellite offices were not able to connect to the database, leaving them out of sync with the rest of the team. After an extensive search of Contact and Customer Managers, JDA was pleased to learn about Sage ACT! Hosted—allowing them to connect remote employees without having to migrate to a new system, or invest in new data hosting infrastructure.

"With Sage ACT! Hosted, reps in Nevada and Arizona can communicate over the same application," says Dunton. He adds, "We like that we can use our offline version with the benefits of hosting so our cohorts can access the system."

This was a key benefit over other solutions. Dunton says, "Other solutions we considered were purely internet based, without providing the flexibility of using an offline version."

## Real-Time Data in the Cloud Provides Convenience and Enhances Productivity

In the home office, the JDA team has used Sage ACT! extensively. Dunton says, “We like the versatility of being able to sort, prioritize, and group customers.” JDA uses these groups to target their marketing and sales efforts. Dunton adds, “Being able to put all customers into groups by frequency of contact, dollar volume, and priority is really important to us.”

However, until implementing Sage ACT! Hosted, use of these features was limited to a home office desktop version with sync capabilities. This meant the remote reps had to rely on receiving manual reports and paper contact lists to manage their customer relationships.

“Now they are totally linked in and connected with the database real-time, with a better grip on customers and changes within the field,” explains Dunton. He adds, “Updates are instantaneous, so the reps are always on the same page.”

## Automatically Updated Software Relieves Internal Burden

Dunton explains that they have always been very satisfied with Sage ACT!, and were relieved to discover a Sage ACT! Certified Consultant\* could coordinate both the hosting effort and ongoing maintenance. “We had no interest in hosting in-house, or outsourcing ourselves. It was key to have the hosting available through Sage ACT! with minimal investment.”

“With Sage ACT! Hosted, now [the remote sales reps] are totally linked in and connected with the database real-time, with a better grip on customers and changes within the field, and updates are instantaneous, so the reps are always on the same page.”

— Jerry Dunton,  
Sales and Service Representative,  
JDA Group

A key benefit of Sage ACT! Hosted is having the maintenance and software updates taken care of automatically. “We always have the most current version,” says Dunton. This relieves the burden internally to keep the software updated and maintained.

Overall, Dunton is very pleased with the investment in Sage ACT! Hosted: “Sage ACT! Hosted has given us better continuity and synchronization with all clients; we’re better engaged, and better informed.”

## About Sage ACT!

Sage ACT! makes it easy for you to have meaningful conversations with customers by giving you an organized view of the people you do business with. Like the millions of individuals in small businesses and sales teams who use Sage ACT!, you’ll always be prepared with recent emails, meeting notes, task reminders, and social media profiles, because all of these details live in one place. You can even use Sage ACT! like a sales and marketing assistant to get the right leads, send striking marketing campaigns, and track your overall performance. The bottom line, Sage ACT! takes care of the administrative stuff so you can focus on building long-lasting, profitable business relationships.

## About Sage North America

Sage North America is part of The Sage Group plc, a leading global supplier of business management software and services. Sage North America employs 4,000 people and supports 3.1 million small and midsized business customers. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 13,100 people and supports 6.2 million customers worldwide.

## Important Notes:

For Sage ACT! Hosted: Review Sage ACT! system requirements at [www.act.com/systreq](http://www.act.com/systreq). You must purchase one Sage ACT! Hosted subscription per user. Feature limitations with Sage ACT! Premium (access via web) apply for online access. View the KB to learn more. Visit [www.ActSolutions.com](http://www.ActSolutions.com) or contact your add-on product provider to determine compatibility for your add-on products.

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