Sage ACT! | Customer Success

Challenge	Solution	Results
As Amerifund sought to provide better sales and marketing tools to its staff, a scalable and integrated database was required.	Upgrading to ACT! Premium gives Amerifund a single, centralized database accessible to the entire staff.	Amerifund is able to selectively target subsets of its database for email campaigns. Mail merge templates save time and ensure consistent communication. ACT! Premium is so easy to use, staff adoption is 100%.

ACT! by Sage Premium is a Valuable Investment for Amerifund

Amerifund, Inc., a leading national equipment finance company, provides commercial financing services that allow businesses to invest in the equipment they need to grow and succeed. By working closely with equipment suppliers, Amerifund is able to tailor its lending programs to meet the needs of Fortune 100 corporations as well as smaller companies. ACT! Premium is the solution Amerifund relies on to nurture its customer relationships. "ACT! Premium enables us to manage our sales process and effectively market to our client base," says R. Wade Rasmussen, president of Amerifund.

A Solution That Grows with Your Business

Rasmussen began using ACT! 14 years ago, when his business was new. "I really just used it as an electronic Rolodex, keeping addresses and phone numbers of my clients and investors," he recalls. Several years ago, Amerifund upgraded to ACT! Premium, rolling out the software to each of the company's employees and allowing them to take advantage of centralized contact and customer information and powerful sales productivity functionality. Today, ACT! Premium has grown into an invaluable sales and marketing tool used by the entire staff.

Keep Sensitive Data Secure

Amerifund tracks its clients, lenders, and investors within ACT! Premium, segregating them in the database by using the ID/Status field. He praises the security features within ACT! Premium that enable him to hide individual fields and even entire Contact records from view. In this way, salespeople are free to view their own Contacts, yet prevented from viewing sensitive investor data.

"The mail merge saves us a tremendous amount of time," says Rasmussen, "and it ensures consistency in our corporate communications."

Customer
Amerifund, Inc.

Industry
Commercial Financing

Location
Scottsdale, Arizona

Number of Locations
One

Number of Employees
15

System
ACT! Premium
CompanionLink Express

Note: Beginning with the 2011 version, ACT! by Sage is now called Sage ACT! and ACT! by Sage Premium is now called Sage ACT! Premium.

Target Your Marketing Efforts

"We regularly use ACT! Premium to send emails to our clients to notify them of programs that might be of interest," says Rasmussen. "It's effortless communication. We set a reminder alarm to send these notices out every quarter and use an email template we've prepared."

Rasmussen added several custom fields, allowing Amerifund to track the unique information about its clients, lenders, and investors. Amerifund is able to target a subset of clients in its ACT! Premium database based on geographic area, past borrowing activity, industry, or many more attributes. "We added a new Industry field with drop-down choices to keep the data consistent," explains Rasmussen. "As a result we can create industry-specific marketing campaigns—tailoring our message to the industry."

Other custom fields in ACT! Premium track the status of all of the company's lending transactions. "This allows us to quickly pull up a list of all pending applications, for example, and work to close them," Rasmussen says.

Rasmussen appreciates the detailed management information he is able to pull from ACT! Premium. He's written several reports within ACT! Premium to show the who, when, and how much details of pending and open loans. A client may have credit available if their loan was approved for more than they have drawn. Rasmussen is able to zero in on these clients and extend special offers and incentives to them. "I like that I can access the data in many different ways, depending on what information I want," adds Rasmussen.

Keep It Easy to Use

The fact that ACT! Premium is easy to learn and use is key to its high 100% usage within Amerifund. "People are impatient, and if the software isn't easy and intuitive, they won't use it," Rasmussen notes.

Because the staff is comfortable working within Microsoft® Outlook®, Rasmussen has set up Outlook as the default email client to compose, send, view, and work with email while in the ACT! Premium application. Staff can schedule appointments

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> President

and tasks using either the ACT! Premium calendar, the Microsoft Outlook calendar, or both.

Rasmussen runs the CompanionLink Express add-on for ACT! Premium on his Treo handheld device, allowing him to access and modify data directly on the mobile device and have it automatically update the ACT! Premium database. This ensures he is always working with the most current data.

Stick with What Works

Shortly, Amerifund will expand its services by offering mortgage financing. Rasmussen says he'll rely on ACT! Premium for that aspect of the business as well. "We'll just add a new database, to keep the sets of Contacts separate. ACT! Premium will work ideally for that side of the business too."

Over the years, Rasmussen has tried other contact management software, including a solution specific to his industry. "I keep coming back to ACT!," he concludes. "It only makes sense to stick with what works."

Note: Customer is a participant in the Sage Customer Reference Program and may be eligible for participation-based incentives.

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.

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