Sage ACT! | Customer Success

Challenge	Solution	Results
HealthCare Partners' clientele and complex industry required a flexible, powerful solution to ensure the details of its valuable relationships are tracked.	ACT! Premium for Workgroups adapts to the company's growing needs and offers powerful functionality in a cost-effective solution.	HealthCare Partners is now able to deliver professional, personalized service that keeps its clients loyal. As a testament to its success, 70% of the company's business today is repeat business.

ACT! by Sage Premium for Workgroups helps HealthCare Partners maintain healthy relationships

HealthCare Partners of Duluth, Georgia is a successful staffing agency specializing in the temporary and permanent placement of medical doctors, placing an average of 225 physicians each year. Hospitals, clinics, and other facilities across the Southeast have relied on HealthCare Partners for over 10 years. And for each of those 10 years, ACT! by Sage has been the contact management solution HealthCare Partners has relied on to keep its clientele happy.

"More than 70% of our business today is repeat business," explains Ruddy Polhill, president and CEO of HealthCare Partners. "We make it our business to know our clients and meet their professional staffing needs. ACT! Premium for Workgroups helps us do that."

Keeping Pace With Growth

As the company has grown, the ACT! family of products has kept pace, allowing HealthCare Partners to easily upgrade to more powerful editions of the software that provide more sophisticated functionality such as remote synchronization and group scheduling.

"We always look forward to the new features each version adds," says Polhill, "ACT! continues to meet our needs as we grow."

Tracking Vital Statistics

HealthCare Partners serves two distinct sets of clients: medical facilities and healthcare personnel. For each set of clients, HealthCare Partners must track unique and critical data, and ACT! Premium for Workgroups accommodates that need. HealthCare Partners' ACT! Certified Consultant configured ACT! Premium for Workgroups to track the data for each group of clients in new data fields and data tabs within the software. As an example, for its healthcare personnel clients, the organization can track a doctor's specialty as well as various licenses and the associated expiration dates. "We set up reminders based on those expiration dates," says Polhill, "and contact the physician in advance of that expiration date to record the renewal."

The Activity Series feature within the program allows HealthCare Partners to establish a predefined set of activities and assign that series to a Contact. An Activity Series related to a new placement, for example,

Customer
HealthCare Partners

Industry
Medical Staffing

Location
Duluth, Georgia

Number of Locations
One

Number of Employees
20

Number of Independent Contractors
225

System
ACT! Premium for Workgroups

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

might remind sales associates to send various forms and to record the date they are returned, ensuring that no part of the process is overlooked. "We are well organized and professional," says Polhill, "just what our clients expect."

Maintaining Healthy Relationships

ACT! Premium for Workgroups helps HealthCare Partners deliver prompt and efficient service to its clients. The powerful search and filter functions within ACT! Premium for Workgroups enable HealthCare Partners to perform highly targeted searches of its large, 32,000-record database. For example, when a hospital in Kentucky calls, HealthCare Partners' sales consultants can quickly look up all the licensed physicians in that state who are without a current assignment. If several physicians meet the specifications, staff can use the mail merge function to send an email to each of them, informing them of the potential opportunity and asking them to contact HealthCare Partners if they have an interest.

Common lookups can be saved as Groups, further speeding access to the company's data. Groups can be dynamic—for example, the physicians in Georgia, which will change as doctors move in and out of the state. Or Groups can be static—for example, a list of hospitals in a particular region. A static group will only change when staff members specifically add or remove a group member.

ACT! Premium for Workgroups also holds the small yet important details that allow HealthCare Partners' sales consultants to bring a personalized approach to their work. "We store kids' names, where they like to vacation, details like that," explains Polhill. "Knowing those details differentiates us from impersonal placement firms."

Getting a Checkup

In the past, Polhill and his team looked at developing a custom solution that would incorporate the organization's billing, commission, and client databases. "The more we looked, though, the more we realized that to develop something like that would be prohibitively expensive—and at the end of the day probably wouldn't be as good at managing our clients as ACT! Premium for Workgroups. Our people are comfortable using it, and it's an amazingly powerful package."

From a management perspective, Polhill appreciates the reports he is able to print from ACT! Premium for Workgroups. The reports show how many new doctors have been engaged and

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President and CEO
HealthCare Partners

what new medical facilities have contacted the organization. The ability to quickly run a report to see which doctors have an expired license and have not responded to recent requests helps Polhill manage potential risk while ensuring the quality of the organization's placements stays high.

While the average tenure among sales consultants is a lengthy seven years, he appreciates that by holding the important details in a centralized database, disruption caused by turnover and vacation is minimized. "Our salespeople use ACT! Premium for Workgroups to record the notes of every conversation they have with our clients. So all of the details of our relationships are available to any of the sales consultants when needed."

Making House Calls

While away from the office or working from home, sales consultants are able to run ACT! Premium for Workgroups on their laptop computers, and synchronize their data when they connect to the Internet, over the company's virtual private network (VPN). "That's been very helpful," explains Polhill, "it gives us the ability to work anywhere."

ACT! Premium for Workgroups helps maintain the professional relationships HealthCare Partners has built its business around. "ACT! Premium for Workgroups helps support the best practice model we use within this business," concludes Polhill. "It helps us be better at what we do."

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

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