Sage ACT! | Customer Success

Challenge:	Solution:	Result:
Grow a startup business from scratch: brand and position the new company for success, communicate key differentiators, and reach as many prospects as possible to get the new business off the ground quickly.	Sage E-marketing for ACT!* provided built-in templates, prioritized follow-up lists, contact profiling, and more—all integrated with Sage ACT! contact records—allowing True Choice Benefits to reach prospects and grow their business in record time.	With Sage E-marketing for ACT!*, True Choice Benefits has solidified their brand, launched new products, and grown their business—to over 4,500 contacts in only three years—faster than they would have been able to without it.

Customer:
True Choice Benefits, LLC

Industry:
Health Insurance

Location:
Phoenix, AZ

System:
Sage ACT! Premium
Sage E-marketing for ACT!*

True Choice Benefits Reaches Thousands to Grow New Business Fast—from the Ground Up

Shelly Winson has been in the business of crafting health care solutions for over 24 years. Having earned distinguished industry certifications and designations, Winson took a bold step in 2009 to focus her extensive background and experience on small employers and individuals by launching True Choice Benefits. An independent health insurance agency, True Choice Benefits specializes in consumer-driven health care strategies for small employers, individuals, and families. True Choice Benefits helps families look at their health care needs in new ways to maximize their investment, with a focus on bringing down health care costs by living healthier.

Faced with growing a new company from scratch, Winson needed a comprehensive Contact and Customer Management solution. In previous roles, Winson had used many different systems, including Goldmine®, Salesforce.com®, proprietary systems and even Sage ACT!. Having tried all of these, Winson knew she wanted to use Sage ACT! to grow her business, and was pleased to learn of the automatic integration with Sage E-marketing for ACT!*.

Winson says, "Sage ACT! is flexible, and easy to understand and use. Other systems I used were unwieldy – it was hard to create reports and find information, there was very little personalization."

Integrated E-marketing Solidifies Branding and Generates Growth

Sage E-marketing for ACT!* has been instrumental in helping True Choice Benefits grow their business. In the past, Winson had used ConstantContact®, and her web site provider actually includes a drip marketing[1] feature free with their service. But Winson chose Sage E-marketing for ACT! hands down because it was built into her contact database, and allowed her to maintain ownership of her contact information and reach new prospects quickly.

Winson says, "I built this agency from scratch, I didn't buy an existing book of business or franchise, so it was really important to get business on the books ASAP. Sage E-marketing for ACT! helped me reach contacts right away, creating brand recognition and growth."

"I also love public speaking and seminars," Winson adds, "and Sage E-marketing for ACT! helped us get these activities off the ground quickly. I use it to promote my speaking engagements and seminars which draw in new business."

Customizations Enable Specialized Database and Personal Communication

One reason Winson chose Sage ACT! was because of the customization capabilities. She says, "I took the Premium version of Sage ACT! and added pages and fields and a ton of information so my database is completely specialized for me and my business." Using these customizations, she can segment her clients by product and company, and target specific communications to these blocks of her business.

Winson also liked that there were templates for newsletters and communications, and that she could upload her own headers and personalize them to look like her business. Winson says, "Some of the systems I used in the past looked really generic—which made it look like someone else was sending the emails for me."

Winson adds, "We have a really personalized business model. It is critical to be able to provide information tailored for each client." Sage ACT! Premium and Sage E-marketing for ACT!* allow her to do just that.

Automatic Call Lists and Open-Rates Drive Targeted Follow-ups

Using this data, Winson can execute effective marketing strategies. She explains, "One year, I sent a New Year's message to the whole database, and over a third opened it.

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— Shelly Winson,
Benefits Consultant/Owner
True Choice Benefits, LLC

I use this data to gauge interest in specific products." Winson adds, "To introduce a new product, I created a webcast, used email to promote it, and used the open-rate data to create a custom call list for anyone who didn't come."

Winson has also used Sage E-marketing for ACT!* to promote charitable events. She hosts an annual event for the Humane Society called Something for Lilly. Having used Sage E-marketing for ACT! to garner interest, the Humane Society took notice and donated supplies. The event was a huge success, meeting the fund-raising goal of $1,000, and was featured on a local television show.

Whether for charitable or business use, Winson credits Sage E-marketing for ACT! for her success: "We have been able to grow much faster than we would have without it."

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 E-marketing for ACT!: Sage E-marketing for ACT! is powered by Swiftpage™. For Sage ACT!: Review Sage ACT! system requirements at www.act. com/2012systreq. You must purchase one license of Sage ACT! per user. Scalability varies based on hardware, size, and usage of your database. Visit www.actsolutions. com or contact your add-on product provider to determine compatibility for your add-on products.

*Requires additional subscription
[1] Drip marketing is purchased in addition to the Email Marketing service level. Each additional user is an additional cost.

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