

Sage ACT! | Customer Success



Challenge

GoldMine lacked field-level security and efficient duplicate-record checking functionality, which meant excessive time was spent simply maintaining the software.

Solution

ACT! Premium for Workgroups provides a powerful feature set and sophisticated functionality.

Results

The company is saving more than 150 labor hours each month because of efficient duplicate-record checking and field-level security. Light customization and integrated auto-dialing and fax capabilities result in increased sales staff efficiency.

ACT! by Sage Premium for Workgroups Answers the Call for Ridgeway Communications

Ridgeway Communications Enterprises, LLC, a leader in the distribution of guestroom telephones, supplies major hotel chains, universities, and municipalities with telephones, electronic access systems, two-way radios, and related equipment. Ridgeway Communications understands the importance of making connections. To ensure its own lines of customer communication are always open, Ridgeway Communications relies on ACT! Premium for Workgroups.

“ACT! Premium for Workgroups is irreplaceable,” says Soni Frazier, computer consultant with Ridgeway Communications. “It gives us exactly what we need to effectively communicate with and sell to our customer base.”

A Clear Connection With Contacts

Ridgeway Communications had been using GoldMine® software to track its contacts, but as Frazier describes, the time spent maintaining the software was overwhelming. “The duplicate-record checking functionality was very poor, so we’d end up with different records for ‘The Waldorf Astoria’ and ‘Waldorf Astoria.’ The GoldMine software didn’t offer field-level security, so I had to lock people out of whole areas of the software. That meant I had to do all the data entry and maintenance myself.” Frazier says she felt like she spent more time maintaining the software than using it.

Frazier found information about ACT! Premium for Workgroups while browsing the Sage website. “The site offered detailed information about ACT! Premium for Workgroups,” Frazier recalls. “And it was clear that ACT! Premium for Workgroups included the functionality we needed.”

The transition from GoldMine to ACT! Premium for Workgroups was easy, says Frazier. “We exported to Excel, cleaned up all those duplicates, and then imported the data into ACT! Premium for Workgroups.”

It Works The Way We Work

Frazier appreciates that ACT! Premium for Workgroups offers the flexibility to customize field names, allowing her to change the field labeled Company to Hotel, for example. Another benefit is the ability to add

Customer

**Ridgeway
Communications
Enterprises, LLC**

Industry

Communications
Equipment Data and Voice
Access Services

Location

Memphis, Tennessee

Number of Locations

One

Number of Employees

14

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.

drop-down lists to the data entry fields. Sales staff can select a value from the drop-down list—which both speeds data entry and ensures consistent data for reporting purposes.

Using field-level security, Frazier can tightly control which users have access to which fields, freeing her from performing routine maintenance tasks. She can allow employees to update certain information, such as a hotel manager's name, while locking them out of more sensitive data.

Ridgeway Communications sells its products into two distinctly different industries: hospitality and corporate business. To accommodate the differences between the two markets, Ridgeway Communications has set up two ACT! Premium for Workgroups databases. This allows the company to label data fields appropriately—Hotel instead of Company, for example—and allows for a different set of customized database fields to be used. “In our hospitality database we track things like guest room phone model, faceplate color, and general manager's name—while for our business customers we'll track credit rating and annual income,” explains Frazier.

Saves 150 Hours Each Month

Ridgeway Communications' staff used to spend hours each week performing duplicate-checking and data correction in GoldMine. Now, using the ACT! Premium for Workgroups Scan For Duplicates utility, Frazier says this task takes just a few minutes every other day. Frazier appreciates the flexibility the software provides when scanning for duplicates. “I can look for a match on hotel name, phone number, and address at the same time to be sure we catch any duplicate entries.”

By using the powerful duplicate-checking function and field-level security, Frazier estimates the company saves over 150 labor hours every month. “I wouldn't have believed ACT! Premium for Workgroups could save us that much time, but it does!”

Effective Sales Team

Ridgeway Communications' sales staff use ACT! Premium for Workgroups to track sales opportunities, schedule appointments and activities, and to create and send sales agreements.

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.

“ACT! Premium for Workgroups is at the core of what we do. It saves us time, money, paper, ink—it just saves us.”

– Soni Frazier
Computer consultant
Ridgeway Communications Enterprises, LLC

Sales managers monitor the activities of their team using the Shared Calendar feature within ACT! Premium for Workgroups. Because customer information is stored in one centralized, easily-accessible location, the effect of staff vacations, absences, and turnovers is minimized.

Frazier credits the software's power and functionality with saving time, money, and increasing efficiency. “Sales representatives can make a phone call, send an email, or send a fax—all without leaving the software. With the auto-dialer function they can simply click the Dial button to dial a contact's phone number.”

Frazier adds, “There is no need to print out a document and feed it through the old fax machine, it's all done from within the ACT! Premium for Workgroups.”

Email and fax templates within the software include mail-merge fields such as the contact name, hotel name, and salesperson's name. “The templates work wonderfully,” explains Frazier. “They save time—and typos—and they look professional.” By setting up templates, Ridgeway Communications ensures that it is delivering consistent, professional, yet personalized communication.

“ACT! Premium for Workgroups is at the core of what we do,” adds Frazier, “It saves us time, money, paper, ink—it just saves us.”