

## Sage ACT! | Customer Success



### Challenge

The Betty Brigade had been using Outlook to schedule appointments, but it lacked the capability to track, organize, and access the details of client relationships so important in the concierge business.

### Solution

ACT! Premium and ACT! Premium for Web provide powerful team scheduling tools, a secure and accessible location to store unique client details, and access to data for the company's remote staff.

### Results

Client information is collected and stored in a single location, accessible to the entire team even when they are away from the office. By analyzing customer demographic data, The Betty Brigade can target its marketing efforts.

### Customer

**The Betty Brigade**

### Industry

Service - Personal

### Location

Ann Arbor, Michigan

### Number of Locations

Two

### Number of Employees

Seven

### System

**ACT! Premium**

**ACT! Premium for Web**

### Add-On Product

**eMail-Lead Grabber**

## ACT! by Sage Premium Solutions Provide an Organized Solution for The Betty Brigade

The Betty Brigade will walk the dog, sort the mail, do the shopping, and pick up your dry cleaning—plus a number of other tasks. A personal assistant and concierge service, The Betty Brigade is based in Ann Arbor, Michigan. Sharon McRill founded the company several years ago to put her organizational and project management skills to work. Today, the company employs seven individuals and has recently opened a second location. What tool do the organizational experts use to stay organized? ACT! by Sage Premium and ACT! by Sage Premium for Web—which provides the company with both Windows and web-based access options.

### Find an Ideal Solution

Within a year of starting the company, McRill recognized the need for a powerful contact management solution like ACT! Premium Solutions. "I was using Microsoft® Outlook®—it worked alright for scheduling appointments, but it didn't give us the ability to store details about our client relationships," she says. "In this business, those details are very important."

With plans to hire additional staff for her growing business, McRill looked for a solution that would support a group calendar, so that she could monitor and schedule her team's appointments. She also wanted to provide remote access to the software so that employees could access their messages and calendar from home. "A colleague made a compelling case for ACT! Premium," McRill says. "It is designed to do exactly what we want to do—track the details of our client relationships and organize our activities. And by adding ACT! Premium for Web, my staff can access the database from anywhere."

### Boost Your Service Levels

Delivering a consistently high level of service is the company's goal, and ACT! Premium Solutions support that goal. McRill engaged a local ACT! Certified Consultant to help her take advantage of the flexibility inherent in ACT! Premium Solutions—relabeling existing fields and adding new fields to hold data specific to her business. "We added a tab for the client's pets which details name, age, description, and health problems or specific habits of each animal," says McRill. The Betty Brigade also stores the names of its clients' vendors, such as the handyman or painter, in ACT! Premium, so they can be associated with a client appointment as needed.

*Note: Beginning with the 2011 version, ACT! by Sage is now called Sage ACT!. ACT! by Sage Premium and ACT! by Sage Premium for Web are now called Sage ACT! Premium (including access via Windows® and web).*

"This is where ACT! Premium Solutions really excel," says McRill. "We have complete client details in one place, accessible by everyone. We didn't have this with Outlook."

When one of The Betty Brigade's employees heads to a client's home, they can print a custom report that McRill designed to summarize the client's information. "It's so important to have all the details in one location and for them to be accessible to everyone," McRill says. "Our clients rely on us, and ACT! Premium Solutions give us the place to store and access the data we need to keep our clients happy."

### Build Your Client Base

The Betty Brigade recently began using ACT! Premium Solutions to help market its services. With the help of her consultant, McRill added a new demographics tab to store details about her existing clients such as marital status, religion, income bracket, and age group. "By analyzing the demographics of our existing clients, we can better understand what type person uses our services and can market to that demographic," she says. For example, McRill learned that many of her clients are older and do not actively use the Internet. "That information led me to decide to continue my print ads in the local yellow pages when I might otherwise have discontinued them," she adds.

### Never Miss a Date

ACT! Premium Solutions help the company efficiently manage the schedules of its seven-person team. "A day in the life of a personal assistant is unpredictable," says McRill. "Our schedules can change radically from day to day—appointments are added, cancelled, changed, or sometimes the scope of a task changes."

McRill loves the ability to color-code the schedules by individual. "By viewing all the activities of my team on one color-coded group calendar, I can easily see where we can fit in another appointment and see who is available to handle it," says McRill.

McRill also relies on the group calendar to help ensure she is billing properly for services. "I use the calendar as a double check against my billing software, checking off each appointment to ensure that each one that should have been billed was billed," she adds.

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— Sharon McRill  
The Betty Brigade

The task reminders are another feature that The Betty Brigade appreciates. "Clients will ask us to remind them of an important event, so we simply set up a task in ACT! Premium Solutions and a reminder automatically pops up on the screen so that we don't overlook it," McRill says.

The Betty Brigade website allows clients to fill out a form and request a service. The company uses an ACT! add-on product called eMail-Lead Grabber to help move that information from the website into ACT! Premium Solutions. The add-on solution generates an automatic email response message to the client acknowledging their request and also schedules a call in ACT! Premium Solutions so that staff is reminded to call the individual and schedule the appointment.

### Anytime, Anywhere Access

By running both ACT! Premium and ACT! Premium for Web, The Betty Brigade has the security of redundant systems. If the power is out at the office for example, staff can work from home, accessing the ACT! Premium database over the Internet. "This happened to us last winter," says McRill, "I forwarded the phones to my cell phone and we remained up and running with ACT! Premium for Web."

McRill concludes, "ACT! Premium Solutions are of high value to The Betty Brigade—it has become an integral part of the business. I call it my eighth employee."

### 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 mid-sized 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.