

## Sage ACT! | Customer Success



### Challenge

Comtrad Cable had been using ACT! with each sales representative maintaining his or her own database. Management wanted a centralized database for ease of administration and sales process management.

### Solution

ACT! Premium provides a centralized database and the tools to make the Comtrad Cable sales team more effective in their jobs.

### Results

Efficiencies effectively double sales representatives' selling time. Sales are up by nearly \$1 million. Sales representatives can quickly generate professional quotes and schedule follow-up activities. The company can easily target specific customer categories with its marketing messages.

### Customer

**Comtrad Cable**

### Industry

Consumer Electronics

### Location

Channahon, Illinois

### Number of Locations

One

### Number of Employees

11

### System

**ACT! Premium**

### Add-On Product

**QuoteWerks from Aspire Technologies, Inc.**

*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.*

## Comtrad Cable plugs into ACT! by Sage Premium

For more than 20 years, family-owned Comtrad Cable has manufactured and distributed computer network cables and networking equipment to businesses and cable installers nationwide. Much of its business comes as a result of highly-targeted telemarketing and email marketing campaigns. An essential tool in the Comtrad Cable sales process is ACT! Premium.

"ACT! Premium is a vital part of our operations," says Tony Hamilton, Comtrad Cable's owner. "My entire staff uses and relies on it. It's running all day, every day."

### Million Dollar Return

With the help of its ACT! Certified Consultant\*, Comtrad Cable recently upgraded from ACT! by Sage to ACT! Premium to allow the entire sales team to work from a single centralized database and share calendar and task-scheduling functions. ACT! Premium provides greater scalability, data sharing, and advanced workgroup functionality—all crucial to this growing business. The consultant consolidated each salesperson's individual database into the single ACT! Premium database. "We were hesitant to make the switch at first," recalls Hamilton. "It involved an upfront investment on our part, but the return has been phenomenal."

Since implementing ACT! Premium, the company's sales are up by nearly \$1 million a year, an increase Hamilton largely attributes to the time savings and efficiencies ACT! Premium delivers. "By eliminating steps and streamlining procedures, we've effectively doubled the sales representatives' selling time," he says.

### Customize To Fit The Business

Comtrad Cable's consultant set up several custom fields to allow the company to track data specific to its operations. "Each custom field has a drop-down list for the representatives to choose from, this keeps the data consistent and meaningful," says Hamilton.

The company engages only in permission-based marketing, asking prospects to opt-in if they'd like to receive the company's email messages. To ensure that those who have opted-out do not receive further solicitations, staff maintains a field in the Contact record indicating permission. Another field indicates the contact's preferred communication method, such as email, fax, or mail, and another holds the contact's referral source.

Because Comtrad Cable's sales representatives generate quotes as a standard part of the sales process, the company's consultant introduced Hamilton to QuoteWerks from Aspire Technologies, a companion solution for ACT! Premium. QuoteWerks makes generating a quote for a Contact a quick and easy task.

With QuoteWerks, the Contact address and other data is transferred automatically into the quote. As a quote is saved, a PDF copy of the quote is saved to the Documents tab in ACT! Premium, a new Opportunity is created, and a follow-up call is scheduled—all in a single step. "It literally saves six or eight steps and several minutes of time. Sales representatives use that time to follow up on other opportunities," says Hamilton.

### Tailor the Message

The company uses the ID/Status field in ACT! Premium to distinguish between its different types of customers, such as end users, web buyers, or resellers. Comtrad Cable can then target each group with marketing messages specific to them. "I can perform a quick lookup to see how many reseller customers we have, for example, and even send them all an email right from the lookup," explains Hamilton.

Hamilton makes use of the Group function in ACT! Premium to assign sales territories to his sales representatives. Contacts are quickly added to or removed from a Group. The Group View within ACT! Premium makes it easy for each sales representative to view all open opportunities and track the follow-up activities associated with members of their Group.

*\* Certified Consultants are third-party vendors. Sage and its affiliates are in no way liable or responsible for claims made related to the services provided by third-party vendors.*

### 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.

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– Tony Hamilton  
Owner  
Comtrad Cable

"My representatives tell me they couldn't get through the day without ACT! Premium," says Hamilton. "They use the calendar function to manage their time, the task list to track activities, and the notes feature to record details of their efforts."

### Manage for Success

To get the sales management information he needs, Hamilton relies on the ACT! Premium Opportunity List. Using the multiple data filters, and the ability to customize the columns displayed, Hamilton can uncover precisely the information he's looking for. "I like to see all open opportunities with a close probability greater than 50%, and a value of more than \$250, and can get that information instantly," he says. "I'll also look at opportunities that have been open for more than 30 days—it helps me keep the sales process moving."

Hamilton concludes, "I thought ACT! was great before—but ACT! Premium is outstanding."