

## Sage ACT! | Customer Success



### Challenge

The success of Hawaii Commercial Real Estate depends upon the relationships it builds. It requires a solution to track the details of both its client and its property interactions.

### Solution

The company began using ACT! Premium at its inception and has since added ACT! Premium for Web for its expanded access capabilities.

### Results

The product's flexibility allows it to track both clients and properties and the vastly different data associated with each. Web access helps staff be productive when they are away from the office.

### Customer

**Hawaii Commercial Real Estate**

### Industry

Commercial Real Estate

### Location

Honolulu, Hawaii

### Number of Locations

One

### Number of Employees

Nine

### System

**ACT! Premium  
ACT! Premium for Web**

### Add-On Product

**Remarkable Mail**

## Hawaii Commercial Real Estate Says Aloha! to ACT! by Sage Premium Solutions

With a fabulous climate, abundant natural resources, and a finite land mass, the real estate market in Hawaii remains consistently strong. Hawaii Commercial Real Estate, a commercial realty and property leasing organization, has been successfully capitalizing on this market. The company specializes in sales, leasing, and financing of office buildings, hotels, retail centers, industrial buildings, and investment properties. To help the company nurture the thousands of relationships it has worked to develop, Hawaii Commercial Real Estate turns to ACT! Premium Solutions.

"ACT! by Sage Premium has been here since day one," says Cecilia Wahlquist, office manager for the company. "The owner had used ACT! by Sage when he was with another company and believed it would be a good fit for this organization. In fact it's a great fit for us—better than anything else."

### Easy Web Access

Because ACT! Premium is such an integral part of the company's operations, Hawaii Commercial Real Estate recently added the ACT! by Sage Premium for Web product to provide easy remote access for the entire staff.

"If we aren't at our desks, we can still access our ACT! Premium database over the Internet," explains Wahlquist. "If I can't come into the office one day, I can work from home and manage my tasks."

### Build Stronger Relationships

The real estate industry is based primarily on relationships and ACT! Premium Solutions helps Hawaii Commercial Real Estate nurture and strengthen its relationships with its clients, including buyers, sellers, building owners, and tenants.

One way ACT! Premium Solutions helps the company build its relationships is with the Notes feature where staff members record personal details about their clients, such as hobbies and life events. "Real estate is contact-intensive and we like our clients to feel special. ACT! Premium Solutions helps us remember the details so we can give our clients that extra special service," says Wahlquist.

*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).*

### Organize Your Busy Workday

Wahlquist likes that she can easily manage both her calendar and the owner's calendar from within ACT! Premium Solutions. "I appreciate the reminders that alert me to upcoming appointments and tasks," she says.

The company's busy agents also rely on ACT! Premium Solutions for their calendar, email, and communications. "The integration with Microsoft® Outlook® is great," says Wahlquist. "The appointments we make in ACT! Premium Solutions update our Outlook calendars as well."

### Deliver Personalized Marketing Communications

Hawaii Commercial Real Estate launches several advertising efforts each year, with help from ACT! Premium Solutions. Using an ACT! add-on solution called Remarkable Mail, the company's marketing specialist can send high-quality, personalized postcards to selected ACT! Premium Solutions contacts, all without leaving her desk, licking a stamp, or stuffing an envelope.

"We love communicating with our clients in colorful, professional, personalized ways and ACT! Premium Solutions helps us do that," Wahlquist says.

### Keep the Pipeline Moving

The company's staff uses the Opportunities component in ACT! Premium Solutions to capture the details of each new sales opportunity. "We use the Opportunity Reports like the Pipeline Report to see how our sales are progressing and forecast our monthly volume," sales Wahlquist. "By keeping this information in ACT! Premium Solutions, we all know the status of every deal."

The company also makes extensive use of the Groups feature in ACT! Premium Solutions as a means to group contacts with a common attribute. "It's fast to add contacts to a group and it's an efficient way of looking at our data," explains Wahlquist. "For example, we have a group for each year's transactions, adding properties to that group when they are sold or leased. I can look at that group and instantly see how many transactions we've been involved in for the year and the sales volume they represent."

"We could not function a day without ACT! Premium Solutions. It's way beyond contact management software—it is our business operations tool. We wouldn't be able to run this business without it."

– Cecilia Wahlquist  
Office Manager  
Hawaii Commercial Real Estate

### Tailor to Fit Your Business Needs

Hawaii Commercial Real Estate has set up multiple ACT! Premium Solutions databases, one for its contacts, one for the properties it sells and manages, and one for open listings. It is a testament to the flexibility and customizability of ACT! Premium Solutions that the same software can fit such different requirements.

"We track the details of every property we sell or help a client buy or lease within ACT! Premium Solutions. We've added custom tabs and data fields to track information such as the lease date, terms of the lease, year constructed, and number of parking spaces," Wahlquist explains. "In our client database we track an entirely different set of characteristics that help us relate to and understand our clients."

"We could not function a day without ACT! Premium Solutions," concludes Wahlquist. "It's way beyond contact management software—it is our business operations tool. We wouldn't be able to run this business 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 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.