Sage ACT! | White Paper

The Automated Selling Machine

Sage ACT! boosts productivity by automating key sales, marketing, and customer service tasks.

Table of Contents

Turn Your Business into a Selling Machine

Sage ACT! helps you get more of the two things your business needs most—time and money—by automating key activities and unlocking a rich source of new leads. Sage ACT! includes powerful, yet easy-to-use functionality to help you turn your sales and marketing efforts into a consistent, systematic lead generation and selling machine. Use Smart Tasks to develop standard, automated workflow for scheduling sales activities, sending out marketing campaigns—including Sage E-marketing for ACT![1]—and remembering important customer service tasks. Then, expand your business with highly qualified new leads from Sage Business Info Services.

Meet your new personal assistant: Sage ACT! Smart Tasks

Have you ever wished you had someone working behind the scenes to make sure that you provide current and prospective customers with the service they expect? Welcome to new Smart Tasks, included in Sage ACT!.

Think of Smart Tasks like your personal assistant, sending emails for you and adding activities to your calendar automatically, based on directions you set out. Smart Tasks get the job done. You'll notice fewer small items on your to-do list and your customers will enjoy consistent, responsive service. Meanwhile, you can focus on the big sales opportunities and make sure prospects receive the personal attention required to close the deal.

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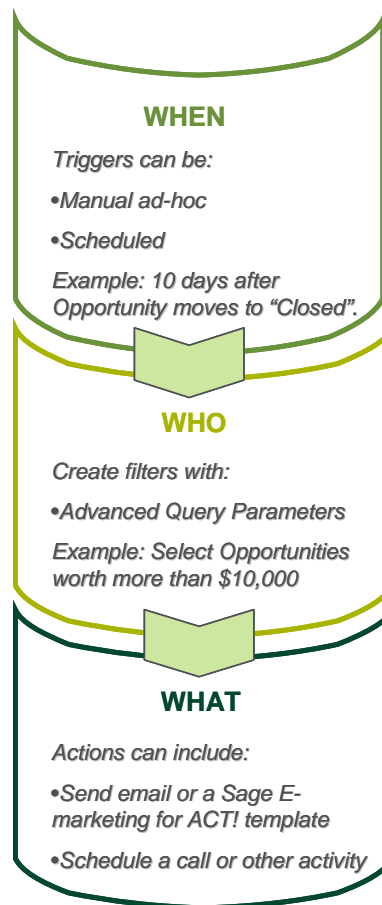
What are Smart Tasks?

Smart Tasks are a series of common and connected steps, performed inside of Sage ACT!. Smart Tasks will set in motion the most basic or advanced processes to take care of things like reaching out to customers that you haven't heard from in a while or notifying you of stalled sales opportunities.

By putting small steps together, Sage ACT! can automatically perform many of your routine sales, marketing, and customer service tasks. This helps everyone in your organization to work more productively so you can contact more prospective customers, sell more products or services and support more existing customers—all without needing to hire new employees or acquire resources!

Easily Automate Key Tasks

Smart Tasks enable you to automate activities that you do on a regular basis to keep the ball rolling in your sales and marketing efforts. To create a new Smart Task, you will need to define three things: when, who, and what the Smart Task should affect.

WHEN

Triggers can be:

• *Manual ad-hoc*

• *Scheduled*

Example: 10 days after Opportunity moves to "Closed".

WHO

Create filters with:

• *Advanced Query Parameters*

Example: Select Opportunities worth more than $10,000

WHAT

Actions can include:

• *Send email or a Sage E-marketing for ACT! template*

• *Schedule a call or other activity*

1 Requires additional subscription.

Smart Tasks run when they are triggered. You can either set a trigger to follow a schedule, or trigger the Smart Task manually when you want it to begin. Schedule a Smart Task to complete the steps in the workflow on a certain day of the week or time of day. You can also have a Smart Task move on to the next step as soon as the previous step is complete. You can even direct a Smart Task to wait a number of days, weeks, or months before performing the next step in your process.

Next, decide who you will want to include in the sales, marketing, or customer service task. You can run Smart Tasks for Opportunities or Contacts. Filter based on any criteria available in the Opportunity or Contact, including product fields and user defined fields.

Smart Tasks can be set up to schedule an activity, or a series of activities, including phone calls, meetings, to-do items and other user defined activities. Smart Tasks can also send a pre-formatted email or a series of emails using Sage E-marketing for ACT! [2].

An easy-to-use visual diagram wizard helps you set up the workflow that Smart Tasks will follow. Smart Tasks functionality is built on proven Windows® Workflow Foundation, so it is easy to use and extremely reliable.
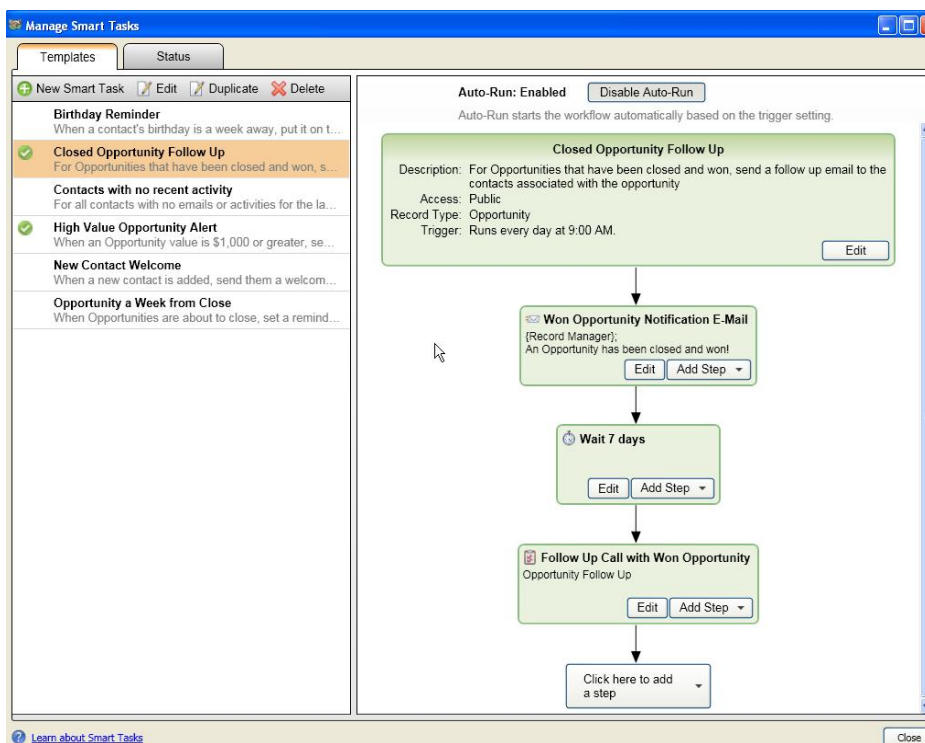
The more you automate routine sales, marketing and customers service processes, the smoother your business will operate, leaving you with more time to focus on the big picture.

In a few minutes, you can decide when a Smart Task will run, what task it will perform, and which Contacts or Opportunities it will include. Because Smart Tasks includes one of the easier visual designers[3] on the market, you'll be able to design a new workflow with only a few mouse clicks. Start from scratch, or simply edit one of 10 pre-loaded Smart Tasks and accompanying email marketing templates included in Sage ACT!. If you want to reorder the steps, just drag and drop them on the screen in your preferred order.

As you can see, Smart Tasks provide a very versatile and flexible way to automate many, if not most, of your everyday sales, marketing, and customer service tasks. The more automation you create, the smoother your business will operate, leaving you with more time to focus on the big picture. In the rest of this guide, we'll examine some ways you can use Smart Tasks in your day-to-day business.

Increase Productivity and Efficiency in Sales

Smart Tasks allow your sales professionals to spend less time making to-do lists or scheduling follow-up activities. By improving their efficiency, your sales team can spend more time working with prospects and customers to earn additional revenue for your business.

To ensure security, only administrators and managers can create new Smart Tasks or edit existing templates. But setting up a new Smart Task is so easy that it doesn't require programming or technical expertise. In fact, sales managers can easily create Smart Tasks for the sales team.

Smart Tasks also provides a way to solidify existing sales processes and standardize them so they are applied consistently to all opportunities. Automate your best practices so that everyone works sales leads by the method that is most likely to result in new business. For example, you can set up a Smart Task that will trigger when an opportunity moves to the "needs assessment" stage of the sales cycle and schedules a to-do for the record manager to complete the necessary forms to analyze the customer's needs.

Now, you can unlock a rich source of new leads by using Sage Business Info Services for ACT![4] to pull highly targeted prospect lists and business info from Hoover's™ directly into Sage ACT!. Once you have imported new leads, you can create a Smart Task to perform a variety of tasks with them.

For example, provide industry and company information from Hoover's to your sales person, then search and import a list of companies that match specific traits using Sage Business Info Services for ACT!. Next, the Smart Task will schedule cold calls for those new leads. After the Sage ACT! contact history indicates an initial call has been completed, your Smart Task can move on to its next step—adding the contact to a marketing campaign for future mailings or emails.

Time Marketing Campaigns to Maximize Results

In marketing, the right timing is essential. If you wait too long to follow up with an interested prospect, they will lose interest. Likewise, if you try to sell to the right people at the wrong time, you are unlikely to meet with success. Too often, businesses do not make consistent marketing efforts. Instead, they turn marketing on and off like a spigot when the sales team asks for new leads. This approach costs more and is usually less effective than automating marketing processes to improve productivity and utilizing affordable methods such as email.

Smart Tasks help you time your marketing campaings so that you will get the most return for your marketing dollars. By spacing communications with customers and prospects correctly, you will keep them engaged in a dialog with your company and nurture them toward a purchase until it is time to hand the lead off to sales.

Smart Tasks allow your sales professionals to spend less time making to-do lists or scheduling follow-up activities and more time making the sale.

4 Requires additional subscription.

As you design your marketing Smart Tasks, you can include campaigns in Sage E-marketing for ACT![5], which is a cloud-based email marketing service that enables you to exectuve sophisticated campaigns, while leveraging and bulding on your existing Sage ACT! information.

Right out-of-the-box, Smart Tasks integrate with Sage E-marketing for ACT!. Use Sage E-marketing for ACT! to capture leads with web forms on your website, nurture prospects automatically with Drip Marketing plans, and quickly identify your hottest leads using a ranked call list based on propsect lead scores.

Nurture Prospects Automatically with Drip Marketing

Create multi-step campaigns to nurture new leads and incorporate these Drip Marketing plans into your Smart Tasks sequences. Drip Marketing blends simple tasks, like automatically sending an email response when someone fills out a web form, with intelligent technology that reacts differently to contacts based on their behavior, like automatically mailing a postcard or letter to a contact that has not opened email.

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7 ideas for marketing automation with Smart Tasks

1. Send a welcome e-mail to new contacts.
2. Nurture leads by assigning all opportunities to drip email campaigns in Sage E-marketing for ACT!
3. Invite new customers to subscribe to your electronic newsletter, product announcements, or other programs.
4. Put your customer loyalty program on auto-pilot with automated, timed email campaigns
5. When Opportunities change to "Closed-Won" status, send an email that offers customers the opportunity to upgrade their selection, or purchase related products or services.
6. Schedule Opportunities in the "Inactive" status to receive periodic customer success stories and/or savings offers.
7. If an Opportunity moves to "Closed-Lost" status, wait a while and then try a special campaign to reengage the contact, or survey lost sales to find out what your company could have done better.

Deliver Outstanding Customer Service

Customer service is another great area to automate everyday tasks with Sage ACT!. By setting up Smart Tasks, you can deliver those extra little touches that remind customers why they like dealing with your company. The extra attention that you are able to pay to the customer experience is well worth the effort—it is much easier (and more profitable) to sell more products or services to an existing customer, than to replace that customer.

5 Requires additional subscription

You can also go the extra mile to keep up with changing customer contact data and ensure a well-maintained database. Smart Tasks will contact customers that are missing key contact information from their records with a survey that automatically plugs any data received back into Sage ACT!.

7 ideas for excellent customer service with Smart Tasks
1. Schedule a follow-up call from an account manager after an opportunity moves to "Closed-Won" status.
2. Send an email to new customers explaining how to contact your company, where to find additional information about products or services, and how to sign up for any available training.
3. Deliver annual customer satisfaction surveys.
4. Send a birthday email greeting to customers, or schedule a call from their account representative.
5. Celebrate customer loyalty by sending a thank you email or letter on the anniversary of each customer's first purchase.
6. Survey customers with incomplete mailing address or bad email address and automatically update the database.
7. If you have web forms for customers to fill out with questions, technical issues, or complaints, quickly acknowledge receipt of those comments with an automated email response.

Conclusion

With a good set of well-designed Smart Tasks, you won't need to worry about a high value sales Opportunity slipping through the cracks, or forgetting to follow up with your best customers. Smart Tasks help business owners and sales persons work more efficiently and stay on top of important follow up activities. Using Smart Tasks, you can implement multi-stage—yet affordable—marketing campaigns, and time the sequence of communications to achieve the best results. Finally, Smart Tasks keep up with day-to-day activities that remind customers why they like to do business with your company. Drive higher customer satisfaction when you automate service tasks such as sending surveys, maintaining accurate contact information, and communicating appreciation for customer loyalty.

New capabilities in Sage ACT! are designed to help busy professionals save time and money by improving productivity throughout the organization. Automate key activities so that you can get more accomplished every day and expand your business with a rich source of new, highly qualified leads. With Sage ACT!, you can quickly build an automated selling machine inside your business!

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Important Note: Review Sage ACT! system requirements at www.act.com/2011systreq. You must purchase one license of Sage ACT! per user. Scalability varies based on hardware, size, and usage of your database. Sage E-marketing for ACT! is powered by Swiftpage™. In the Sage ACT! Premium (access via web), Sage Business Info Services for ACT! import functions must be performed on the web server. **Compatibility:** Visit www.actsolutions.com or contact your add-on product provider to help determine compatibility.

Important Note for ACT! 6.x or Prior Customers: Customer activation and registration are required to use Sage ACT!. Certain features may have changed or are no longer available, including inbound caller ID functionality, WinFax integration, recording and playback of macros, email/modem–based database synchronization, and SideACT!.

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