



## CUSTOMER SUCCESS STORY

### CUSTOMER

Brown & Sharpe, Inc., a Hexagon Metrology Company

### CORPORATE PROFILE

#### Headquarters

North Kingstown, Rhode Island

#### Type of Business

Manufacturer of coordinate measuring machines

#### Number of Employees

300+

### APPLICATION Software

ACT! Premium for Workgroups

#### Add-on Products

- ACT! for Palm OS®
- Web Response Grabber by eGrabber® Inc.

#### Number of ACT! Users

80

## Brown & Sharpe Gains Measurable Sales Results with ACT! by Sage Premium for Workgroups

When Brown & Sharpe first implemented ACT! 6.0 a few years ago, the company took a gradual approach, activating just 50 licenses. The licenses were divided across four regional databases. Each regional sales team was allowed to configure the solution its own way because the databases were not synchronized.

Brown & Sharpe, a major manufacturer of coordinate measuring machines used in process control and quality control applications, needed to take control of its own processes and applications. Although benefiting from ACT! on an individual and regional basis, company executives decided it was time to formally enforce contact and customer management procedures. They wanted to begin with a centralized solution to prevent data loss from sales turnover while helping to streamline sales processes.

### Seamless Data Synchronization

From the outset, Brown & Sharpe planned to stay within the ACT! product family. Both IT and sales championed the solution.



With help from their ACT! Certified Consultant, Brown & Sharpe upgraded to ACT! Premium for Workgroups, maintaining four regional databases but doubling the total number of licenses. Each database is structured to enable seamless synchronization and ACT! is customized to export customer-related data directly from the company's ERP system.

"The customization was done just to make my life easier," said Tom Dibasio, IT Project Manager, Brown & Sharpe. "Out of the box, ACT! Premium for Workgroups did exactly what we needed and it's working just the way we want it to."

### CHALLENGE

Brown & Sharpe wanted a solution within the ACT! product family that would centralize separate regional databases, streamline sales processes, and strengthen management capabilities.

### SOLUTION

Upgrade from ACT! 6.0 to ACT! Premium for Workgroups. Integrate ACT! with the company's ERP system, as well as ACT! add-on products, including ACT! for Palm OS®.

### RESULTS

Improvements in sales processes, better management forecasting and analysis, and increased aftermarket sales due to marketing features within ACT!.



Your business in mind.

*"Out of the box, ACT! Premium for Workgroups did exactly what we needed and it's working just the way we want it to."*

— Tom Dibiasio  
IT Project Manager  
Brown & Sharpe

## ABOUT SAGE SOFTWARE

Sage Software offers leading business management software and services that support the needs, challenges and dreams of more than 2.5 million small and mid-sized business customers in North America. Its parent company, The Sage Group plc (London: SGE.L), supports 4.7 million customers worldwide. For more than 25 years, Sage Software has delivered easy-to-use, scalable and customizable software for accounting, customer relationship management, human resources, time tracking and the specialized needs of accounting practices and the construction, distribution, manufacturing, nonprofit and real estate industries. For more information, please visit the Web site at [www.sagesoftware.com/moreinfo](http://www.sagesoftware.com/moreinfo) or call 866-308-2378.



Brown & Sharpe took advantage of Web Response Grabber, an ACT! add-on product, to capture Web site leads. With Web Response Grabber, new Web site leads are automatically exported into ACT! and assigned to the appropriate sales person. Each new prospect appears with a scheduled follow-up activity to alleviate administrative headaches for busy salespeople.

Additionally, Brown & Sharpe implemented ACT! for Palm OS® to allow salespeople to access complete contact and customer information from their integrated PDA and phone devices. Now they can look up a contact in ACT! using ACT! for Palm OS, press a button to dial the phone number, and conduct a sales call – all from the same device. According to Dibiasio, "ACT! for Palm OS has proven to be a critical tool in improving sales processes, especially for our reps on the road."

## Streamlining Sales Processes

Sales teams are now required to synchronize their databases by close of business each Friday so managers can analyze sales pipelines on Monday. Managers especially appreciate being able to export data from ACT! into Microsoft® Excel® at the touch of a button because previously they had to manually collect forecasting data by calling or e-mailing each salesperson.

"Now, it's all in ACT! where everyone can see it," said Dibiasio. "All we have to do is synchronize. This is a big improvement for our sales force."

The new solution also gave executives access to all four sales databases, allowing them to generate regional or national reports and manage to a broad company strategy. Now, with a standardized interface, executives can switch between regional views without adjusting to different formats.

## Leveraging ACT! for Marketing

Brown & Sharpe also uses ACT! to manage retention marketing programs – a particularly critical function in the industry. Because the company generates significant revenue from aftermarket business (e.g., software upgrades, maintenance contracts, calibration services, etc.), it's essential to target particular customers at key points.

"We initially bought ACT! for the sales aspects," said Dibiasio, "but we realized we could capitalize on our investment by taking advantage of the marketing functions. Now we use standard features in ACT! to manage the crucial aftermarket part of our business."

Inside Sales simply runs a report to see which customers are due for calibration or other services, and then e-mails a promotion to that group – a task formerly performed manually.

Improvements in aftermarket sales, as well as those in management and process integration, have driven Brown & Sharpe to further expand its contact and customer management initiative. As a first step, the company plans to add another 30 ACT! licenses next year.