ACT!
by Sage

CUSTOMER
Calvis Wyant Luxury Homes

CORPORATE PROFILE
Headquarters

Scottsdale, AZ

Type of Business

Custom Home Builder

Number of Employees

24

APPLICATION
Software

ACT! Premium for Workgroups

Add-on Products
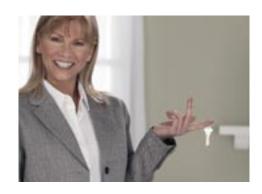
ACT! for Palm OS®

Number of ACT! Users

24

Calvis Wyant Brings Contact & Customer Management Under One Roof with ACT! by Sage Premium for Workgroups

For more than 20 years, Calvis Wyant Luxury Homes has designed and built high-end homes in the Phoenix area. With home prices ranging from four million to eight million dollars, Calvis Wyant's sales team requires the ultimate in contact and customer management. The company's success depends on closing large and very personal deals, which require lengthy sales cycles and supreme service levels.

Knowing the impact of customer service on its business, Calvis Wyant had made several attempts at implementing a companywide contact and customer management solution, but none had been successful. As a result, several products were unofficially in use. Employees used varying combinations of GoldMine®, Microsoft® Outlook®, Windows® Daytimer Software, desktop ACT! installations, and others.

"Over the years, we'd tried three or four off-the-shelf software programs, including Goldmine and Daytimer. They were supposed to enable functionality such as companywide networking off the shelf, but none delivered. I wasted a year cleaning databases, implementing, and losing files," said Margaret Kelly, administrator, Calvis Wyant.

Problems mounted as Calvis Wyant tried to serve customers without a centralized database. Sales, marketing, and accounting struggled to keep prospect and client records up to date. Inter-company information sharing presented challenges because employees couldn't access each other's databases. Data integrity was compromised each time a record was updated in one system and not in another.

Choosing ACT! to Unify Information and Efforts
Under the guidance of its ACT! Certified Consultant, Calvis Wyant leadership decided to switch the entire organization to ACT! Premium for Workgroups.

CHALLENGE

Calvis Wyant needed to replace the mix of "customer management" applications unofficially in use throughout the business, in order to centralize and standardize data.

SOLUTION

Implement ACT! Premium for Workgroups to provide all departments with centralized contact and customer data access.

RESULTS

ACT! Premium for Workgroups enabled Calvis Wyant to achieve greater efficiency and productivity in sales, marketing, and customer service.

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"None of the other applications we looked at offered the features, the database flexibility, and the customization capabilities of ACT!," said Kelly. "Plus, ACT! is the easiest to use."

Calvis Wyant worked with its ACT! CC to implement and customize ACT! according to the company's environment. As an example, they created a Property Tab that allows members of the sales team to manage information such as lot number, utilities, housing association, permit numbers, real estate agent, interior designer, and more. Also, the ACT! CC customized the ACT! interface to facilitate the management of hundreds of subcontractors, open work orders, and other industry-specific groups and processes.

"ACT! keeps us organized. You can't build a seven-million dollar house if you're not organized. It has enabled changes in our whole routine," said Kelly.

Salespeople rely on the solution to manage all opportunities, especially taking advantage of Notes, History, integration with Outlook, and the ability to utilize ACT! for Palm OS in on-site situations.

Calvis Wyant also uses ACT! to prevent unnecessary maintenance expenditures. The company stores key records – such as the list of subcontractors that worked on a house and all of the warranties associated with the property in the Documents Tab. When a home passes from owner to owner, the data transfers to the new owner's record in ACT!. If the new owner reports a problem such as a broken appliance or roof leak, Calvis Wyant can quickly verify whether it's still protected under warranty.

"ACT! often saves us out-of-pocket expenses," said Kelly, "because we stay on top of warranty data. Without ACT!, it would be nearly impossible to accurately do this for more than 300 home owners."

Improved Marketing through Automation

Calvis Wyant leverages ACT! to automate marketing campaigns and track responses. Before ACT!, sending a simple marketing communication was a time-consuming, multi-application procedure. Now, the company builds an ACT! Activity Series to help deliver targeted, personalized messages, according to prospect type.

For example, if a prospect purchased land within the past three years, Calvis Wyant creates an Activity Series to schedule specific to-dos for various staff members. One person is reminded to send a marketing packet, the next to place a follow-up call, and the next to send a personal note, etc. Across the organization, communication efforts are precisely timed and executed.

"We can attribute at least one sale a year to the marketing coordination enabled by ACT! Activity Series functionality alone," reports Kelly.

Because the company sells an average of only 12-15 homes a year, one sale can represent nearly ten percent of annual sales, depending on the price of the home.

Because of the personal nature of Calvis Wyant's business, the company tracks gifts sent to key prospects/clients, as well as birthdays, anniversaries, children's names and ages, and more. These small touches make a big difference in receiving references and in earning repeat business.

"It's now company policy to put everything in ACT!," stated Kelly. "Everything that everyone does is in the solution."

Since implementing ACT!, Calvis Wyant has experienced efficiency improvements that stem from centralizing information and making it easily accessible to every employee who interacts with customers. The employees at Calvis Wyant appreciate the newfound teamwork and ability to perform their job functions with greater ease. But, Calvis Wyant's clients benefit the most. They're receiving the finest customer service in company history.