



CUSTOMER SUCCESS STORY

CUSTOMER

Gordon Rogers Architecture

CORPORATE PROFILE

Headquarters

Rocklin, California

Type of Business

Architecture Firm

Number of Employees

12

APPLICATION

Software

ACT! by Sage Premium for Workgroups

Number of ACT! Users

12

Gordon Rogers Architecture Boosts Internal and External Communications with ACT! by Sage

Gordon Rogers, principal at Gordon Rogers Architecture, has been an ACT! user and advocate since the first release of the product in 1987. But after almost 20 years of ACT! use, he began to consider whether he should transition his firm from the world's leading contact management solution to a CRM solution.

Rogers felt his firm needed additional capabilities in customer relationship management (CRM) and sales team productivity, but he wasn't sure ACT! could fulfill those needs. On the other hand, smaller companies don't usually implement full-scale CRM because it can be cumbersome and add unnecessary complications to their environment and processes.

After analyzing leading CRM solutions and learning more about the team capabilities in ACT! Premium for Workgroups, Rogers decided to remain with ACT! – a decision he doesn't regret. "I was so impressed by the level of customer service and attention to my concerns, as well as the direction of future product versions, that I decided to stay with ACT!," Rogers said.



Continuing to Reap Benefits with ACT!

With all 12 employees at Gordon Rogers Architecture connected via ACT!, no one is disconnected from the organization's contact information and related processes. The firm leverages ACT! workgroup capabilities to tighten communication and organization, and improve productivity.

They particularly enjoy the direct integration between ACT! and Microsoft® Outlook®, which simplifies group scheduling efforts and saves time. Also, the firm loaded official company documents such as company letterhead and transmittal templates into ACT!, which makes it fast and easy for staff to create professional, standardized outbound communications.

CHALLENGE

After using ACT! for almost 20 years, Gordon Rogers Architecture began looking at CRM solutions to potentially replace ACT!.

SOLUTION

After analyzing leading CRM solutions and learning more about the group capabilities in ACT! Premium for Workgroups, Rogers decided to remain with ACT!

RESULTS

With a renewed commitment to using ACT!, the firm continues to reap benefits, including increased communication, efficiency, and productivity.



Your business in mind.

"Everyone is comfortable with the intuitiveness of ACT!. It really is easy to use. Even our newest users get it right away without requiring training."

— Gordon Rogers
Principal,
Gordon Rogers Architecture

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"Everyone is comfortable with the intuitiveness of ACT!," said Rogers. "It really is easy to use. Even our newest users get it right away without requiring training."

The firm enjoys other powerful out-of-the-box ACT! capabilities, such as the ability to keep precise Notes and History for every contact.

"If we have a client dispute a charge or claim they weren't aware that a particular job was going to be performed, we can remind them of the exact date and time of the conversation in which they agreed to the services. Our ACT! records are critical to our ability to collect proper payment," explained Rogers.

Relying on ACT! to Support a Fast-paced Environment

The firm uses ACT! not just to expedite efficiencies internally, but also to streamline external communications. Often, vendors assigned to a job site will call the firm to get information about work executed by other vendors. The firm relies on the ability to quickly access and distribute all relevant information.

"It's super fast to do Lookups in ACT!," noted Rogers. "If a mechanical engineer needs to talk with an electrical engineer, one of our staff can look it up on-the-fly and provide instantaneous information. We don't experience project delays due to information gaps."

To expedite marketing efforts, Gordon Rogers Architecture takes advantage of the Groups functionality in ACT!. A project manager can perform rapid e-mailing and mail merging to communicate to specific groups of clients or vendors. Staff members don't waste time sending one-to-one messages in situations where an entire group can be updated.

The ability to make global changes to an account record also keeps activities and projects from slowing down. If a client moves to a new address or makes a broad organizational change, such as a change to Web domain or phone system, the project manager at Gordon Rogers Architecture can automatically update all contacts tied to that client.

"It's an invaluable tool for our business," summarized Rogers. "We're able to manage thousands of contacts, merge documents to Groups, and keep History and Notes for every contact. If we had to go to the file cabinet or call people to see if they're available to meet, I can't imagine how much time and energy we'd waste. We do it all in ACT!."