



CUSTOMER SUCCESS STORY

Customized ACT! by Sage Templates Improve Business for 4000 Loan Professionals

CUSTOMER

LoanToolbox

CORPORATE PROFILE

Headquarters

Westlake Village, California

Type of Business

Online training provider

Number of Employees

65

APPLICATION

Software

ACT!

Number of ACT! Users

- 4000 (clients using the ACT! template)
- 20 (LoanToolbox staff)

In 2002, LoanToolbox implemented ACT! to manage its sales and marketing data. At that time, the company's founder began to focus on customizing the ACT! database and interface to support the specific needs of mortgage originators. He experimented with the customization features of ACT! for years, making changes and additions to benefit professionals in his industry. After investing countless hours in perfecting the solution, he began to consider the possibility of making this ACT! template available to his entire client base.



LoanToolbox is a Web-based training resource that teaches mortgage originators how to build and maintain a 100% referral-based business model. By implementing the best practices of top industry leaders, loan professionals use LoanToolbox to manage and grow their businesses more effectively, develop referral relationships, automate marketing campaigns, and manage their databases to increase productivity.

With ACT!, LoanToolbox saw a clear opportunity to strengthen the businesses of its members, while expanding its own service offerings. The company predicted that its customized ACT! template – expertly streamlined to drive the loan application approval process – would serve as the ideal complement to many of its other services.

Incorporating ACT! into Service Offerings

Leveraging the founder's specialized template, LoanToolbox began to provide ACT! as part of its core service offerings. In conjunction with the company's training and consulting services, LoanToolbox members were given the opportunity to utilize customized ACT! templates designed to expedite loan application processing. The templates were a hit. LoanToolbox's clients saw improvements in sales, customer service, and marketing.

"ACT! is an integral part of the value that we provide to our clients," explained Rich Katz, president of LoanToolbox. "Part of what we do is teach lending companies how to

CHALLENGE

Create a customized ACT! template that could be distributed to members to expedite loan application processing, as well as improve customer service and marketing efforts.

SOLUTION

Offer customized ACT! templates downloaded directly from the LoanToolbox Web site and used in conjunction with the company's training and consulting services.

RESULTS

More than 4000 ACT! templates have been downloaded by LoanToolbox members. Since the launch of the initiative, LoanToolbox has expanded its ACT! database by more than 70,000 contact records.



Your business in mind.

“ACT! is not only at the core of our members’ sales, marketing, and communications efforts — it’s also at the center of our business.”

— Rich Katz
President,
LoanToolbox

ABOUT SAGE SOFTWARE

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make contact and customer management an active part of their operations. Because many of our clients select ACT! for their own use, we provide them with customized ACT! screen templates. This allows them to immediately improve the way they work with their customers.”

Now, four years after launching its first ACT! product to members, LoanToolbox has delivered customized ACT! templates to more than 4000 loan officers and executives — approximately half of the company’s overall membership. LoanToolbox offers the templates online, making it fast and easy for members to download them and instantly begin improving how they track and manage customer information.

Among the ACT! features and capabilities that LoanToolbox incorporates into its templates are built-in queries that help officers search records by loan type, as well as fields that track information about applicants’ financial histories. The templates provide convenient, industry-specific fields for capturing critical information about co-buyers, buying agents, listing agents, appraisers, and more.

Leveraging the Marketing Functionality of ACT!

LoanToolbox’s ACT! template features a Marketing tab that makes it easy to create and distribute electronic and printed campaigns to prospects, past clients, and referral partners, as well as to cross-market to other vendors. ACT! automatically tracks recipients, so that users can measure the success of campaigns. Additionally, the template enables loan professionals to quickly segment contacts into groups with key identifiers, such as a Yes/No field specifying whether contacts have opted in or out of particular marketing pieces.

As another component of its marketing services, LoanToolbox offers two different quarterly newsletters, which members can send via ACT!. The solution allows users to add their photos and logos to the newsletter to support their individual brands — yet another example of how LoanToolbox leverages the functionality of ACT! to deliver added value to clients.

“ACT! is the contact management solution of choice for a large number of loan professionals,” said Katz. “It makes business sense for them to take advantage of the numerous ACT! features and programs we offer, rather than customizing or creating for themselves.”

Using ACT! to Improve Sales & Marketing

With the success of its ACT! template program, LoanToolbox developed new strategies for streamlining its own ACT! practices as well. Using the solution to execute sales efforts and targeted marketing programs, the company has achieved unprecedented growth over the past two years. The expansion prompted a 50 percent increase in ACT! contact records, which now total more than 70,000.

With 20 users in its sales and marketing departments, LoanToolbox uses ACT! to track and manage detailed contact records, Notes, History, Activities, and more. Like its members, the LoanToolbox staff accesses customized tabs to track marketing efforts and key sales activities such as product demonstrations and purchase information.

“Our internal use of ACT! proves the value of the customization features and marketing toolsets of the solution,” stated Katz. “ACT! is not only at the core of our members’ sales, marketing, and communications efforts — it’s also at the center of our business.”