



## CUSTOMER SUCCESS STORY

### CUSTOMER

GEI Technology, Inc.

### CORPORATE PROFILE

#### Headquarters

San Mateo, CA

#### Type of Business

Value-added Reseller

#### Number of Employees

24

### APPLICATION

#### Software

ACT! Premium for Web

#### Number of ACT! Users

24

#### Database Information

14,000 records

## ACT! by Sage Premium for Web Provides Real-Time Access to Customer Information for GEI Technology

When GEI Technology launched as an engineering consulting business in 1974, there weren't many tools to help salespeople organize their work other than pen and paper. Even so, GEI thrived for almost 20 years using these methods because it had only a few employees and a small amount of data to manage.

By the mid-90s, however, business had grown to the point where even electronic spreadsheets were not enough to manage customer relationships. In addition, the business had evolved, shifting focus to include the resale of engineering software and hardware. In 1995, GEI became the first SolidWorks® (3D modeling software) Value-added Reseller in northern California.

GEI needed a solution to support its expanding contact and customer base. They chose ACT! over a leading competitor (GoldMine®) because ACT! provided greater flexibility and more sophisticated customization options. GEI started out conservatively, purchasing just two licenses.

Ten years later, GEI had grown to 24 ACT! licenses and five certified SolidWorks training and technical support facilities.



The company faced new challenges in managing and accessing customer data.

### Support for Evolving Needs

GEI enjoyed 10 prosperous years with ACT!, successfully leveraging the workgroup functionality to support and speed its sales processes. The company relies on teamwork between outside sales reps, inside sales support, and technical support. The teams use ACT! to collaborate on accounts, collectively updating notes, activities, and other data. It wouldn't be unusual for GEI employees to interact with 70-80 people within a large customer organization. Their success depended on ACT! as a central repository for managing these relationships. Years of strong sales accelerated GEI's



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### CHALLENGE

After 10 years of success with ACT!, GEI Technology wanted to transition to a solution that would provide anytime, anywhere access to contact and customer data.

### SOLUTION

GEI Technology transitioned to ACT! Premium for Web, giving its highly collaborative sales and support teams real-time access to contact and customer information.

### RESULTS

GEI streamlined its sales processes with real-time collaboration and interaction with accounts. Also, by accessing ACT! data via the Web, GEI's sales reps markedly improved their preparedness and day-to-day efficiencies.

*"ACT! eliminated hours and hours of work in generating forecasts. All I do now is push a button."*

—Don Geri  
Vice President  
GEI Technology, Inc.

## 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,



need for more sophisticated tools. They wanted real-time access to customer data without requiring remote users to synchronize through a VPN. GEI's users perceived the VPN as time-consuming and sometimes unreliable. As a result, outside reps would spend extra time at the office accessing ACT! before meeting with clients. If they didn't, they'd risk appearing unknowledgeable and potentially lose the sale.

GEI needed anytime, anywhere access to customer information. Don Geri, vice president of GEI Technology, headed the search for a new solution. As the key decision-maker for technology projects and the original selector of ACT! in 1995, he was familiar with the contact and customer management market. Geri knew that GEI would benefit from a Web-based solution, but wanted to stay within the ACT! product family based on the company's history of successful use. He began analyzing ACT! Premium for Web as the potential solution.

"I like that ACT! provides a Windows-based environment for administration, a SQL backend, and allows us to run our own Web server. I didn't want an ASP model. We wouldn't trust another company with our data," Geri said.

He decided to upgrade each of his company's 24 employees to ACT! Premium for Web. Now, sales reps can login from anywhere to review account history and check for last-minute details before visiting clients. Reps are no longer blindsided by customers because they lack the latest information.

### Staying within the ACT! Family

GEI chose to remain within the ACT! family for Web-based capabilities, but also because ACT! consistently enabled GEI to drive more sales and maintain tighter control over sales cycles.

Before using ACT!, GEI's sales cycles were unpredictable. Salespeople didn't systematically re-contact prospects and former customers. GEI lost an estimated 25% of potential sales because reps didn't know whom or when to call back. Those accounts would simply slip through the cracks.

With ACT!, sales reps set reminders to call prospects after certain time periods, especially those that purchased competing products. Geri explained, "We win deals by storing competitive losses in ACT!, waiting six months, and then re-contacting those people. They're usually happy to hear from us because other products don't work as well as ours."

Another key reason that GEI stayed with ACT! was its sales forecasts – relied on by management. Responsible for providing weekly updates to SolidWorks, GEI customized ACT! to produce an automated forecast (even creating a sales probability process according to SolidWorks' requirements). As Geri summarized, "ACT! eliminated hours and hours of work in generating forecasts. All I do now is push a button."

GEI implemented other customizations such as adding fields to the Company record to display competitive products used at an organization. During sales calls, reps are prepared to identify competitive weaknesses. Marketing also uses the competitive data in ACT! to run targeted promotions aimed at users of particular solutions. Additional marketing customizations include using ACT! to store newsletter opt-in/out and to denote if a contact will serve as a reference.

Summarizing why GEI remains loyal to ACT!, Geri said, "All these years, one of the main factors that kept us using ACT! is the ability to customize it to fit our business. It does what I want it to do."