



CUSTOMER

Dale Carnegie

CORPORATE PROFILE

Headquarters

Baltimore, MD

Type of Business

Corporate and Government
Training Development

Number of Employees

9

APPLICATION

Software

- ACT! for Windows

Number of ACT! Users

9

Database Information

6,700 contacts in three databases

Dale Carnegie Training Boosts Sales and Customer Service with ACT!

More than 4.5 million people use Dale Carnegie training to sharpen their business skills and strengthen their work performance. Offering customized corporate training solutions and individual training courses, Dale Carnegie uses ACT! to track its business.

All nine members of the office had been using ACT! on individual workstations for more than three years when Chris McCloskey, sales executive and government practice director, decided it was time for the next level.

Chris teamed up with ACT! Certified Consultant Bevan Wistar of Zip City Solutions to determine a way to enhance the office's use of ACT! to boost its productivity.

"Our sales team is often in and out of the office on appointments," said McCloskey. "We wanted our sales assistant to have access to all of the reps'



calendars and contact data so she could fully support them."

Networking Improves Customer Service

"We networked all nine members of the office on ACT! because if a customer calls in, we want everyone to have access to the database so they can help that customer," said McCloskey.

Because Dale Carnegie needed to track and communicate with individuals both inside and outside the office, McCloskey

CHALLENGE

Dale Carnegie wanted to network all team members on ACT! and integrate the program with other key applications in order to increase productivity.

SOLUTION

Dale Carnegie deployed three networked ACT! databases to track their business. They integrated with existing solutions WinFax, eFax, Lotus Notes and Microsoft Word.

RESULTS

Dale Carnegie has improved customer service with ACT! by enabling all employees to have faster and more efficient access to client data, making them more productive.

"I use ACT! for everything, I put all of my contacts and activities into ACT!. I perform all of my communications, whether it's email, faxing, or drafting a letter, within ACT!. It helps me keep on top of important things."

—Chris McCloskey
Sales Executive and
Government Practice Director
Dale Carnegie

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Sage Software offers leading business management software and services that support the needs, challenges and dreams of more than 2.4 million small and mid-sized business customers in North America. Its parent company, The Sage Group plc (London: SGE.L), supports 4.5 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 or call (866) 308-2378.



and Wistar developed three databases: one for graduate assistants and group leaders, one for instructors, and one for customers and prospects.

"By developing multiple databases and networking everyone, we were able to automate and streamline our processes," commented McCloskey. "The instructors put their schedules into ACT! so the sales teams can instantly view them when booking clients." Dale Carnegie also relies heavily on the built-in communications tools within ACT! when working within its customized customer and prospect database. "Prospecting has been made easy with ACT!. We create groups, execute campaigns, and perform broadcast faxing and e-mailing with amazing efficiency," said McCloskey.

As a result, the sales manager now has insight into the sales cycle with the ability to pull reports daily or weekly.

ACT! Customization Meets Business Needs

Another key to Dale Carnegie's success was how easily team members could customize ACT! to meet their unique needs. The team worked with Wistar to customize the screen layout and create a New Opportunity Tab, an Initial Communications Tab, an Interview Tab, and a Tracking Tab. Each of these customizations facilitate the sales process for the team members.

For example, the Initial Communications tab contains the Dale Carnegie Credibility Statement and decision maker

information. The Credibility Statement, which builds initial trust and credibility on phone calls and appointments, is a critical step in the company's sales process. Automating such tasks has expedited the sales process for the team.

Team members also synchronized data to their PDAs, providing employees with mobile access to critical information that allowed them to be more productive. With these customizations, Dale Carnegie was able to create the exact process needed to fully accommodate the sales team.

Integration and Personalization Make ACT! Irreplaceable

"Ease of customization was a key factor in our purchase decision," said McCloskey. "We have tailored ACT! to suit our needs and deliver our critical data instantaneously."

McCloskey has also integrated ACT! with WinFax and eFax, Lotus Notes, and Microsoft Word. In addition to these communication tools, McCloskey and her team utilize the Sales Opportunity tab to forecast business. "This is our hot list," she said. "Not everything makes it here. I use this for big projects."

Integrating ACT! into every aspect of Dale Carnegie's day makes it a tool they cannot live without. "I use ACT! for everything," said McCloskey. "I put all of my contacts and activities into ACT!. I perform all of my communications, whether it's email, faxing, or drafting a letter, within ACT!. It helps me keep on top of important things."