



## CUSTOMER SUCCESS STORY

### CUSTOMER

FedEx

### CORPORATE PROFILE

#### Headquarters

Memphis, TN

#### Type of Business

Logistics and Supply Chain Management

### APPLICATION

#### Software

- ACT! for Windows
- Web Report, an ACT! Add-on product

#### Number of ACT! Users

20

## ACT! Delivers for FedEx

FedEx is more than a household name. It's a company where businesses turn to meet their transportation and logistics needs. When FedEx's Integrated Solutions division needed to better organize its projects and facilitate internal communications, it turned to ACT! from Sage Software.

The Integrated Solutions Worldwide Services team at FedEx delivers logistics and supply chain management solutions to FedEx's corporate accounts. Teamed with sales professionals, the Integrated Services (IS) team of 20 provides the infrastructure technology angle when assessing the needs of potential and existing corporate accounts.

### Project Load Makes Timely Communication Vital

The IS team members quickly realized that while they were serving FedEx customers,



they needed a better way to communicate with their internal partners: the World Wide Sales and management teams.

"There was a lot of frustration within our group because there was no standardized means of reporting," said Alan Fenter, a consultant on the Integrated Solutions team.

At any given time, the team manages 400 projects for clients all over the world. Team members needed a way to organize projects electronically, with the ability to generate accurate reports for partners and



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#### CHALLENGE

FedEx's IS team needed a contact and project manager to manage their 400 projects with the ability to generate accurate reports for the World Wide Sales team, as well as management.

#### SOLUTION

Provide FedEx's IS, sales, and management teams the ability to obtain instant information about all of their 400 projects.

#### RESULTS

Using ACT!, FedEx' IS team has improved internal communications, streamlined their process so they can focus on customer service, and provided management with visibility into the group's pipeline to predict revenues.

*"We only made a few minor changes, ACT! did 95 percent of everything we wanted out of the box. Management loves it! ACT! and Web Reports gives them the visibility they wanted."*

—Alan Fenter  
Consultant  
Integrated Solutions

## **ABOUT SAGE SOFTWARE (formerly Best Software)**

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.



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management. Previously, management received 20 spreadsheets, which the management team compiled into one. This took several days to complete, and by then much of the information was out of date.

Having used ACT! previously, Fenter visited the ACT! Web site to review the latest version. Based on the functionality and ease of customization, he thought ACT! would be the perfect project and contact manager for his group.

### **Making ACT! Work for FedEx**

The IS team was able to make its own customizations to ACT!. "We only made a few minor changes, ACT! did 95 percent of everything we wanted out of the box," said Fenter.

Once the customization was complete, FedEx rolled the product out to each of the group's 20 members, who installed ACT! on their laptops. "Each member synchronizes his or her computer with the master database using an e-mail attachment, it's so easy," said Fenter. FedEx also uses Web Report, an ACT! add-on product that pulls data from an ACT! database and lists that information on a Web page.

In FedEx's case, Web Report retrieves all 20 users' data daily from the database and populates a Web page on the company's Intranet, making the contact information available to all members of the team.

Users can view the notes and histories for the group or the contact, in addition to the status fields such as last reach, last attempt, and last call. "This is the greatest feature! Now our sales team and management have instant access to information about the status of all 400 of our projects. Our team is ecstatic that they no longer have to field status inquiries from multiple people."

### **The Benefits are Clear**

With all members of the IS team now reporting the same way, management and sales have visibility into what the Integrated Solutions team is working on.

"We had people who were hesitant about the new system. They thought, 'Great. One more thing to do.' However, once they got started, they saw the ease and benefits of using ACT!, they really got behind it," said Fenter.

This new system of reporting enables the team to spend less time generating reports and fielding inquiries about account status, allowing more time serving their clients. Fenter explains, "Our team is able to give much better customer service with the tools we now have in place." With ACT!, management now has a way to see the projected revenue and close date for every project being worked on, so they can manage the pipeline and predict revenues.

"Management loves it! ACT! and Web Reports gives them the visibility they wanted," said Fenter.