

ACT!

by Sage



CUSTOMER SUCCESS STORY

CUSTOMER

Legg Mason

CORPORATE PROFILE

Headquarters

Baltimore, MD

Type of Business

Real Estate

Number of Employees

225 Employees in 18 Offices

APPLICATION

Software

- ACT! for Windows

Number of ACT! Users

178

Database Information

1,000 to 3,000 records

Legg Mason Real Estate Services Relates With ACT!

When it comes down to it, mortgage banking is definitely a back-to-basics business. Mortgage brokers deal with insurance companies, Wall Street firms and banks, arranging mortgages for commercial property owners. But, at its core, mortgage banking is all about relationships. Legg Mason Real Estate Services, Inc. (LMRES), is one mortgage banking firm that recognizes this fact.

"Our brokers' contact lists are their lifeblood," said Paul Johnson, regional MIS manager for LMRES. "It's their relationships that make them successful. That means they need to have their critical customer information at their fingertips."

In years past, LMRES brokers used a variety of solutions to manage their customer information. But a few years ago, the company performed an extensive review of the available products and chose ACT!. Since then, when subsequent



versions of ACT! have been released with improvements that would help the business, including the enhanced Palm handheld synchronization and the availability of an interface to its GroupWise® e-mail system, LMRES has upgraded to the most recent version.

"This is a very good product. It does what we need," Johnson notes. LMRES now has 178 ACT! licenses in use at 18 offices along the Eastern seaboard of the U.S. Because most of the company's brokers were already familiar with the intuitive,



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CHALLENGE

Legg Mason's brokers needed a contact manager to provide them with critical customer information to keep their relationships growing along with their business.

SOLUTION

ACT! offered Legg Mason integration with e-mail, fax, and telephone, automatic correspondence and the ability to transfer customer information to PDAs.

RESULTS

With ACT!, Legg Mason has improved efficiency and productivity, while allowing brokers to carry their contact information with them on the road.

sage
software

Your business in mind.

"Our salespeople tell us 'We can't live without ACT!. It's something we have to have!'"

—Paul Johnson
Regional MIS Manager
Legg Mason Real Estate Services

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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easy-to-use ACT! interface, only 10 to 20 percent needed training.

Improved Efficiency with ACT!

In addition to providing quick access to the details that build business relationships, ACT! helps brokers and their assistants work more effectively. "Everyone wants to be as efficient as possible with their time," Johnson says, "and ACT! enables them to achieve that."

Take Raquel Hall, for example. She's an administrative assistant at the LMRES loan production office in Miami Lakes, FL. Her work involves a mix of secretarial and analytical duties and she uses four separate ACT! databases on a regular basis.

"We use ACT! a lot for correspondence," Hall says. "It's really great; very helpful for letters, fax cover sheets and things like that. For example, when I have a contact record open in ACT!, I can very easily open one of our standard letters and that contact's name and address are automatically inserted. I create a fax cover sheet the same way."

Hall says, "ACT! is really easy to use. I didn't need much training at all and I haven't opened the manual even once!" She recommends ACT! to anyone who needs to keep track of vital relationship information. "It helps me every day," she concludes.

"We Can't Live Without ACT!"

LMRES brokers like the ability that ACT! offers to access their data while out of the office, too. Johnson reports that more and more of the brokers he works with are loading their client data into PDAs. "Everyone lives on the road nowadays, so it's very handy to take that data with them," he says. "The ability to transfer data to a PDA is a feature of ACT!, so we didn't have to go to a third party for this functionality." He continues, "There is no question it has improved efficiency."

Judging from the reaction Johnson receives from the brokers he works with, they feel even more strongly about ACT!. "Our salespeople tell us, 'We can't live without ACT!. It's something we have to have!'"