

ACT! | Industry Brief

Commercial Real Estate

Top Commercial Real Estate Firms Depend on ACT! by Sage to Manage their Business

Because relationships matter, top commercial real estate firms use ACT! to manage their business while personalizing the customer experience. With ACT!, firms can manage listings, leases, property sales, and more for a complete, centralized record of relationships and transactions.

The following ACT! customers in commercial real estate use ACT! to communicate better as a team by scheduling and assigning property tours; build stronger relationships by recording details about each client or property for easy recall; and sell more using Opportunities to manage each customer inquiry and keep tabs on close ratios.

Fuller Real Estate Customizes ACT! Premium to Manage Every Customer and Property Detail

Ease of customization, the ability to share information across a team, and the use of multiple databases makes ACT! the ideal solution for Fuller Real Estate. With separate databases to track listings, closings, retail, and leads, Fuller uses each database differently to manage transactions.

The listing database details each property listing so whoever answers a customer inquiry can provide a seamless customer experience by quickly pulling the requested information, such as listings by broker for new properties.

The closing database was customized to record every detail of a closing transaction. Added fields such as property, lessor, buyer, lease, and broker commissions provide a detailed historical record of all closings. Custom reports allow for sorting and filtering the data as needed, providing proof points for the sales cycle. For example, reports containing all closings in a county are sent with proposals to prove market penetration and expertise in that region.

Customizations to the Contact Detail view allow Fuller Real Estate to track every detail related to a property closing, creating a searchable historical record of every transaction.

Property Info	
Site Name	Gross Bl SF
Address	Units - Total
Suite/Unit	Property Code
City	Property Category
State	SF - Land
Zip	Acres - Total

Parties	
Seller/Lessor	
Company	Company
Contact 1	Contact 1
Attorney	Attorney
Address	Address
City	City
State	State
Zip	Zip

Buyer/Lessee	
Company	Company
Contact 1	Contact 1
Attorney	Attorney
Address	Address
City	City
State	State
Zip	Zip

Sales/Lease Info	
Volume Sale Price	Term
Ask Price	Type
TIA	Effect Rate
Billed Date	Comments
Billing Notes	Buyer Agent 1
First Money Due	Agent 2
Remain Comm	

Misc Information	
Source Seller	Buyer Unit
Source Buyer	Title Co
Listing Agent 1	Agent 3
Agent 2	Agent 4
Buyer Agent 1	Agent 5
Agent 2	Agent 4

BENEFITS SNAPSHOT

Easily customize ACT! to record property, lessor/lessee, buyer/seller, and broker data.

Record hard-to-remember details about each client and property to enable tailored, superior customer service.

Create separate databases to track listings, closings, and prospects and make customizations for each.

Schedule and assign property tours and easily track follow-ups.

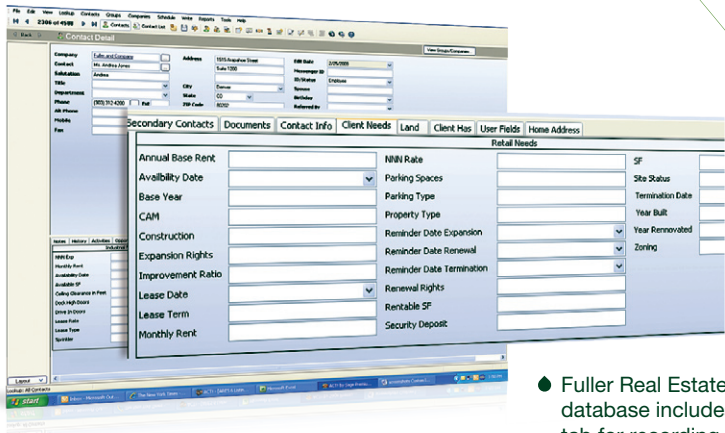
Manage customer inquiries using ACT! Opportunities and evaluate close ratios for more informed decision making.

“ACT! has enabled us to communicate effectively as a team, and makes us look good when we can pull historical data about transactions that really demonstrate our dominance in a particular region.”

— Andrea Jones, Director of Information Services, Fuller Real Estate

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- Fuller Real Estate's Retail database includes a custom tab for recording client needs.

Hawaii Commercial Real Estate Leverages the Flexibility of ACT! Premium to Track Client and Property Details Separately

Hawaii Commercial Real Estate has multiple ACT! databases, one for contacts, one for properties it sells and manages, and one for open listings. It is a testament to the flexibility and customizability of ACT! that the same software can fit such different requirements.

The firm also makes extensive use of the Notes and Groups features. The Notes feature allows tracking of personal details about each client, and the Groups feature allows grouping of contacts with a common attribute. "For example, we have a group for each year's transactions. I can look at that group and instantly see how many transactions we've been involved in for the year and the sales volume they represent," says Cynthia Wahlquist.

American Executive Centers Relies on ACT! Premium for Personalizing the Customer Experience and Evaluating Location Performance

American Executive Centers (AEC) employees rely on ACT! for recording the details of customer conversations, scheduling tours of the company's facilities, following up with prospects, and tracking lease renewals.

Using ACT!, the staff can follow up effectively on every customer inquiry. Each inquiry is tracked using an ACT! Opportunity and a Task is created for the manager to schedule a tour with the prospect. Tracking the opportunities provides key data for decision making.

AEC also uses ACT! to target and personalize marketing communications. Custom fields record each contact's profession and closest facility so this data can be used to target e-mail lists to prospects.

The flexibility and customizability of ACT! has helped these commercial real estate firms build stronger relationships, and ACT! can help your business start investing more in the relationships that make you successful as well.

"We track the details of every property within ACT! Premium. Custom fields track information such as the lease date, terms of the lease, year constructed, and number of parking spaces."

— Cynthia Wahlquist, Hawaii Commercial Real Estate

Customizations may require the assistance of certified consultants, for an additional fee. Certified Consultants are third party vendors. Sage and its affiliates are in no way liable or responsible for claims related to the services provided by third party vendors.

Sage does not provide technical support for customizations.

Important Note: Review ACT! system requirements at www.act.com/2009systreq. You must purchase one license of ACT! per user. Scalability varies based on hardware, size, and usage of your database. Check with your add-on product provider to determine compatibility.

About ACT!

The #1 selling contact and customer management solution for over 20 years, ACT! by Sage continues to bring the latest, most intuitive technology to businesses across the globe. ACT! solutions have more than 2.8 million individual users and 48,000 corporate customers in 25 countries, including individuals, small businesses, selling professionals, and corporate teams. Because ACT! solutions support an "anywhere" workforce with seamless online, offline, and mobile access solutions, they work for any business environment. With ACT!, you can achieve maximum productivity so you have time to focus your attention on business-critical activities, provide a better customer experience because you understand the intricate needs of your contacts, and make informed decisions to advance your business.

About Sage CRM Solutions

Sage CRM Solutions is a portfolio of market-leading applications consisting of ACT! by Sage, SageCRM, and Sage SalesLogix. Over 63,500 organizations and 3.1 million users worldwide rely on Sage CRM Solutions to develop profitable, long-term business relationships.