

# ACT!

Make contact.

Build relationships.

Get results.



Greg Miller  
General Manager and Partner  
Charter Capital  
ACT! User Since August 2000



# Choose the #1 Selling Contact and Customer Manager

## Grow your business with the solution you know you'll love

If developing long-lasting, profitable business relationships is essential to your success, then ACT! is right for you. It helps keep new customer referrals coming in and existing customers coming back. And because ACT! is easy to learn and use, you can be more productive right away.

ACT! is the proven market leader with 2.8 million fanatical users worldwide and has been the #1 selling Contact and Customer Manager for over 20 years—and counting. It comes highly recommended by small businesses and salespeople so you know you'll love it!

With ACT!, you can organize all the details of your customer relationships—phone numbers, e-mails, conversation notes, meeting and activity history, documents, social media profiles, and more—in one place for a complete view of the people you do business with. ACT! improves your marketing effectiveness to attract new customers and get more from existing relationships. And, you can take action on your most qualified sales leads with total visibility and control of your pipeline.



## Choose ACT! for robust functionality and ease of use

ACT! is a business productivity tool that's more powerful and effective than e-mail and spreadsheet solutions, but easier to use, quicker to get up and running, and less costly and complex than a Customer Relationship Management (CRM) solution. ACT! is proven easy to learn and use—**one study shows you can be 25%<sup>1</sup> more productive by choosing ACT! over the competition.** And if your customer information lives in spreadsheets, you can import all of that valuable data into ACT!.

## The cost of doing nothing? It could be everything.

While there has been an understandable rush to cut spending, cost reduction on its own will not steer a business safely through a period of slow growth. Businesses also need to examine how they can safeguard revenues and profitability, particularly within their own customer base.

ACT! helps you protect revenues from your current customers by ensuring that you are continuing to maintain those relationships. Additionally, by providing deeper insight into your customers, ACT! enables you to unearth revenue opportunities within your customer base. And ACT! provides opportunities for new customer revenue by increasing marketing effectiveness.

In a weaker economy, it's tempting to "wait it out," but consider the cost of doing nothing. ACT! helps you build stronger customer relationships and focus on the most promising prospects.

## Did you know...

- **ACT! was initially developed in 1987 by a salesperson, who coined the name "ACT!" for Automated Contact Tracking.**
- **About 2.8 million people use ACT! for businesses as diverse as cheese-maker, hotel chain, design firm, baseball team, seafood restaurant chain, and real estate agency.**
- **You can find ACT! almost anywhere around the world, including France, Germany, the United Kingdom, Canada, and Australia. It is translated into several languages.**
- **ACT! users are resourceful. The Betty Brigade personal assistant service tracks its clients' pets, including their name, age, description, and health problems or specific habits.**

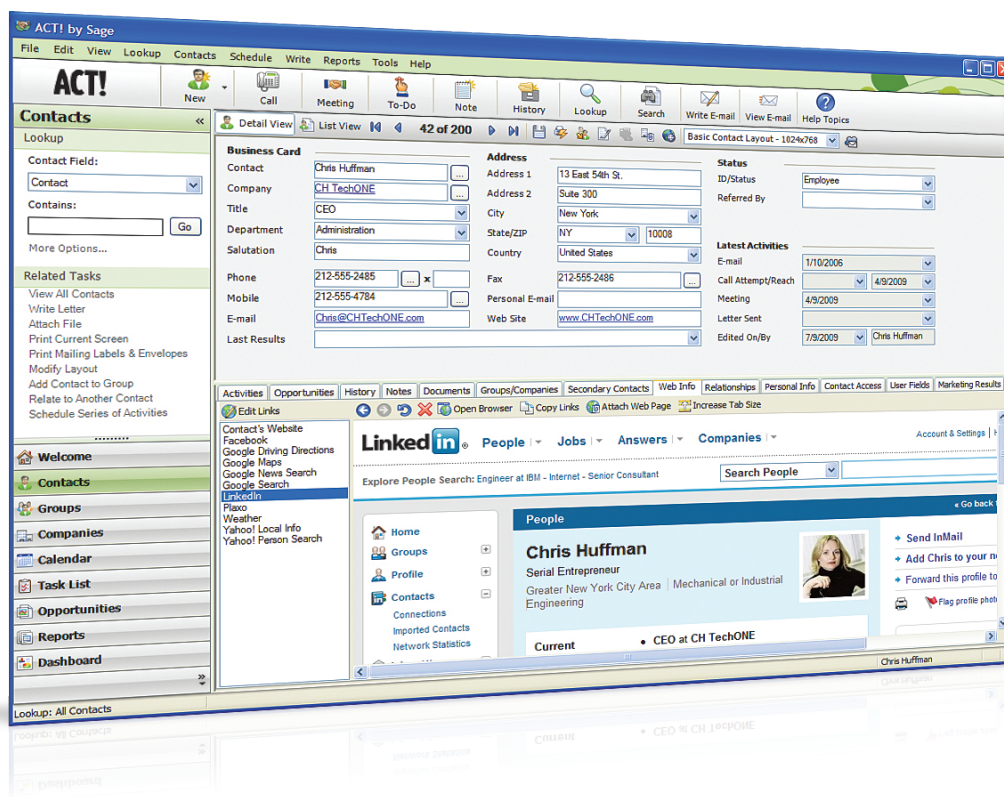
"I needed a way to communicate with ease. I needed great technical support. I needed a solution that just works. I knew where I wanted to take the business, and Salesforce.com couldn't get me there. With ACT! I'm becoming an expert one step at a time. And the best part is, it's so gosh-darn easy."

— Kathy Logan, KM Medical,  
ACT! user since 2005

## ACT! is ideal for...

- Small businesses
- Salespeople
- Consultants
- Realtors
- Financial advisors
- Manufacturers' reps
- Recruiters
- Fundraisers
- And more!

# Develop Profitable, Long-Lasting Business Relationships



## Get organized and get results with ACT!

Strong business relationships are essential to your success. With ACT!, you can organize all the details of your customer relationships in one place—from basic contact information to detailed notes on past interactions—for a complete view of the people you do business with. Next time a customer calls, you're prepared with a response about what you discussed last time, as well as personal details like a favorite sports team, to set your business apart from the rest.

Grow your business by attracting new customers and getting more from existing relationships with end-to-end ACT! E-marketing<sup>2</sup>. Not only can you create and send striking e-mail and drip marketing campaigns using a simple online editor, you'll also be able to quickly identify your most interested prospects using a ranked call list so you know who to reach out to first.

Focus on your most viable leads by capturing and managing each lead through the sales process. Record detailed progress notes, include your products and services, and see the probability of close. This gives you total visibility and control of your sales pipeline so you know where to focus your immediate efforts.

## With ACT! you can:

**Organize customer relationship details** by keeping everything—phone numbers, e-mails, conversation notes, meeting and activity history, documents, social media profiles, and more—in ACT!.

**Search and instantly access** the exact customer relationship details you need using the most basic keyword search to a more advanced field search.

**Improve marketing effectiveness** using ACT! E-marketing<sup>2</sup> to create and send e-mail and drip marketing campaigns, track open and click-through rates, and manage opt-outs.

**Be more productive** by scheduling and tracking meetings and activities. Tasks roll over if not complete, can be cleared, and appear as history with your customer relationship details.

**Take action on sales leads** by tracking each one through the sales process where you can capture detailed progress notes, include your products and services, and see the probability of close.

**Integrate with your existing solutions**, including Microsoft® Outlook®, Word, Excel®, and Lotus Notes®—over 10 business solutions in all. Take full advantage of the familiar solutions you've already invested in.

**Measure results** using 50+ reports and dashboards, or for deeper analysis, send most reports to Excel and use connections to third-party report writers.

**Personalize ACT!** to fit the way you run your business by designing views, adding fields and tabs, editing drop-downs, and customizing templates.

**Share and secure relationship details** across your business with data-sharing options for teams of multiple sizes, and set security by employee profile and customer information.


**Access ACT!** from anywhere with Windows® and Web<sup>3</sup> options, plus from your BlackBerry®<sup>4</sup> or iPhone™<sup>4</sup>.

**Administer and maintain** using Silent Install<sup>5</sup> administration and activation, and take advantage of automatic backup, maintenance, and synchronization options.

## What's new in ACT! 2010...

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- **Newly designed look**
- **E-mail and drip marketing<sup>2</sup>**
- **Integration with social media, including Facebook and LinkedIn®**
- **Fully customizable opportunities**
- **New dashboards and reports**



“We pride ourselves on the personal relationships we develop with our clients and news organizations. ACT! is an essential tool for helping us maintain those relationships.”

— Richard Neuman, News Broadcast Network, ACT! user since October 2006

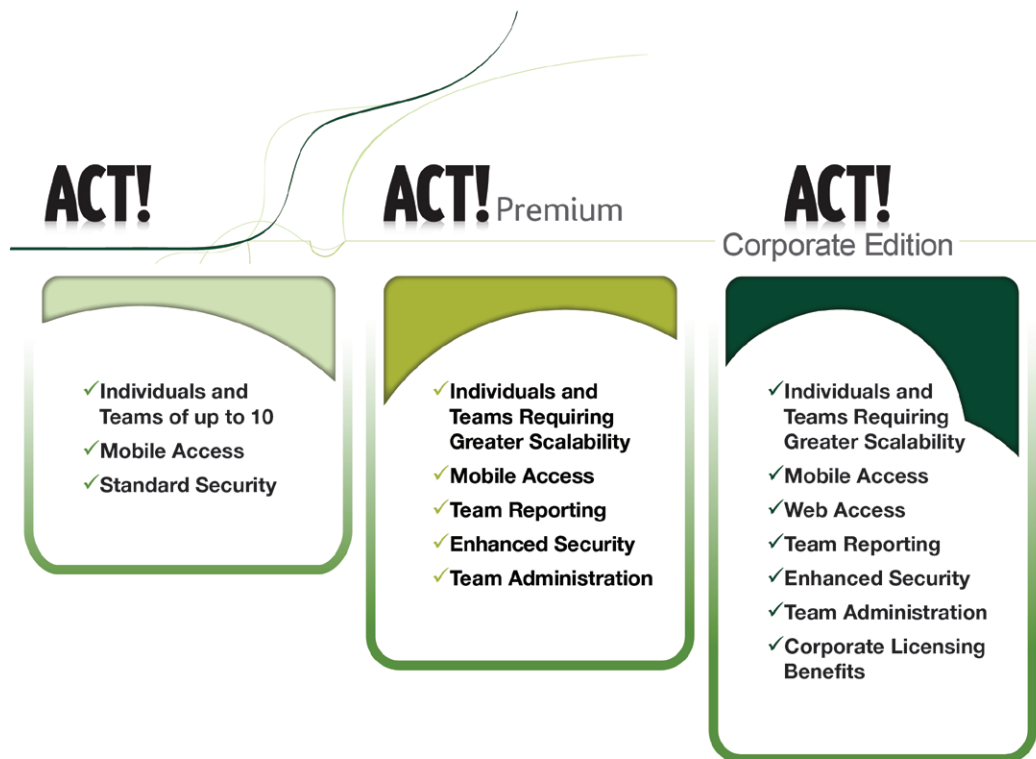


# Gain Greater Freedom of Choice

## Enjoy the Freedom to Choose Technology That's Right for You

ACT! offers three products to meet your Contact and Customer Manager needs. ACT! by Sage is designed for individuals and teams of up to 10 users. ACT! by Sage Premium and ACT! by Sage Corporate Edition (includes ACT! Premium and ACT! by Sage Premium for Web) are for individuals and teams requiring team reporting, enhanced security, advanced administration, and greater scalability.

With ACT! Premium and ACT! Corporate Edition, managers can ensure employees stay on track to meet and exceed their goals with both individual and team performance reporting. Also available are security options at the group, company, and field levels to keep information secure across your organization. Corporate Licensing benefits with ACT! Corporate Edition include volume-based discounted pricing, a dedicated account manager, dedicated pre-sales support teams, the opportunity to purchase corporate support, and much more.





“There’s no question that we’re being more productive. We’re working more on those opportunities that are most productive for us. ACT! has been instrumental in helping us pursue those leads.”

— Larry Schottenstein,  
Buyer’s Agent Real Estate,  
ACT! user since 2005

## Get stability and a range of products and services with Sage

ACT! is part of the Sage product family, so you know that as your business grows and changes, you will continue to find a range of business management solutions to meet all your needs. Sage offers a wide range of front-office and back-office solutions such as accounting, human resources, payroll, fixed asset management, e-commerce, contact management, and customer relationship management.

And, because ACT! is a part of the Sage CRM Solutions product family, which includes market-leading CRM solutions such as SageCRM, SageCRM.com, and Sage SalesLogix, you can easily migrate from ACT! to a full-scale CRM solution.

With Sage you have access to award-winning products and services that have revolutionized the way SMBs do business. You can rely on outstanding service and a commitment to providing your business with the technology it needs to succeed, today and into the future.

## Business resources available to you...

### Sage Partner Network<sup>7</sup>:

- **More than 450 ACT! Certified Consultants, Premier Trainers, and Hosted Partner Providers around the world**
- **Help with ACT! installation, hosting, customization, support, and end-user training**
- **Well versed in front-office disciplines and often have vertical market expertise**

### Add-on Solutions<sup>7</sup>:

- **Third party solutions that integrate with ACT!**
- **Specialized functionality to meet the unique needs of your business**
- **Solutions include mobile and accounting links**
- **Reviewed and approved by Sage**

Angela Olea, RN  
Executive Director  
Assisted Living Locators  
ACT! User Since  
November 2004



<sup>1</sup> Based on a Keystroke Level Modeling competitive study conducted by Sage and Measuring Usability, LLC in May 2009. Competitors include Microsoft Dynamics® CRM and Salesforce.com.

<sup>2</sup> Requires additional subscription.

<sup>3</sup> This feature is only available in ACT! Corporate Edition.

<sup>4</sup> Requires additional purchase.

<sup>5</sup> Delivered as an MSI package. Software to distribute an MSI package is not included. Silent Activation on machines requires Internet access. Users must be machine administrators in order to activate.

<sup>6</sup> This feature is only available in ACT! Premium and ACT! Corporate Edition.

<sup>7</sup> These products and services are provided by a third party vendor. Sage and its affiliates are in no way liable or responsible for any claims made related to products or services provided by third party vendors.

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**Important Note:** Review ACT! system requirements at [www.act.com/2010systreq](http://www.act.com/2010systreq). You must purchase one license of ACT! per user. Scalability varies based on hardware, size, and usage of your database. **Compatibility:** Due to new functionality available in ACT! 2010, we strongly recommend contacting your add-on product provider to confirm compatibility. Using versions of the add-on product that have not been confirmed compatible by the vendor may result in features behaving differently or not appearing within ACT! 2010. Visit [www.actsolutions.com](http://www.actsolutions.com) or contact your add-on product provider to help determine compatibility.

## About ACT!

ACT! by Sage is the #1 selling contact and customer manager in the world with 2.8 million users. It's designed so you can organize all the details of your customer relationships in one place for a complete view of the people you do business with. Improve your marketing effectiveness to attract new customers and get more from existing relationships. And, take action on your most qualified sales leads with total visibility and control of your pipeline. Because ACT! is easy to learn and use, you can be more productive right away. Continue working with your existing business solutions, like Microsoft Outlook, Word, Excel, and Lotus Notes, because they integrate with ACT!.

## 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.



## Sage

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