



CUSTOMER SUCCESS STORY

CUSTOMER

Vermeer-Wisconsin, Inc.

CORPORATE PROFILE

Headquarters

West Salem, Wisconsin

Type of Business

Equipment Dealer

Number of Employees

38

APPLICATION

Software

ACT! Premium for Workgroups

Number of ACT! Users

25

Vermeer-Wisconsin Powers Its Sales Organization with ACT! by Sage Premium for Workgroups

An ACT! customer since the late 1990s, Vermeer-Wisconsin understands the importance of quality contact management. The company initially provided desktop versions of ACT! to individual salespeople for basic tracking of customer information. As ACT! technology expanded to deliver greater capabilities, Vermeer-Wisconsin upgraded to ACT! 2000. A few years later, the company began to want even more robust capabilities, including workgroup functionality, centralized data and administration, plus additional synchronization and customization options to improve management of its sales processes.

A full-service equipment dealer specializing in selling, leasing, training, and servicing Vermeer machines, Vermeer-Wisconsin manages a broad array of customer and prospect data across multiple lines of service. The company's complex business needs led management to consider replacing ACT! with a full-scale CRM system.

Vermeer-Wisconsin examined several leading products, including Siebel® and Microsoft® CRM. Management first ruled out Microsoft because of its newness to the CRM market, then Siebel because it was



too complex and costly. In the end, they selected ACT! Premium for Workgroups because it offered some of the functionality they were seeking in a CRM solution and because of its low total cost of ownership. With ACT!, Vermeer-Wisconsin also remains in the Sage CRM Solutions family, knowing when they are ready to transition to CRM they can follow a smooth migration path from ACT! Premium for Workgroups to Sage CRM SalesLogix.

Customizing ACT! to Support Processes and Communication

After implementing ACT! Premium for Workgroups, Vermeer-Wisconsin took full advantage of increased customization capabilities, carefully tailoring the solution to support existing processes. Among

CHALLENGE

Vermeer-Wisconsin's contact management needs expanded beyond its capacity. Management sought a new solution to support workgroup functionality, centralized data and administration, and customization functionality.

SOLUTION

Enable highly customizable customer management with ACT! Premium for Workgroups to help remote and in-house teams work more efficiently and communicate more effectively.

RESULTS

Improved synchronization capabilities and a customized ACT! interface promoted teamwork between remote sales, management, and finance. The company also strengthened sales opportunity management and reporting.



Your business in mind.

*"ACT! has been a wonderful tool
for this business."*

— Julie Tomlin
CFO,
Vermeer-Wisconsin

ABOUT SAGE SOFTWARE

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other changes, the company established mandatory fields, added new fields to the Contact, Company, and Opportunity List tabs, and incorporated company colors into the interface.

The customizations allowed the company to gather industry and process-specific data with fields such as New or Used Equipment, Manufacturer, Product Code, Model, Serial Number, etc. These labels make it quicker and easier to uniformly manage account information using terminology that's familiar to Vermeer-Wisconsin's workforce and customers.

While Vermeer-Wisconsin's primary ACT! users are salespeople, the company also provides access to employees in the finance department. For this reason, management added a Credit field to the Company tab, which enables the finance team to note whether or not an account has paid in full or owes a balance. This simple change closed a former communication gap between sales and finance, allowing the teams to work together to keep accounts current.

"We use ACT! to track both sales and financial data," said Julie Tomlin, Chief Financial Officer for Vermeer-Wisconsin. "One key benefit of the solution is that it has connected these two groups providing us with a single, central view of all our customers."

Leveraging ACT! to Increase Sales Effectiveness

Vermeer-Wisconsin runs ACT! on a dedicated Citrix® server, which publishes the solution to the company's in-house users via desktop computers. The company's 12 remote salespeople access ACT! locally on laptops and synchronize to the master database over the Internet.

"We like the new synchronization functionality," explained Tomlin. "Our remote users can work as efficiently as the in-house staff. They don't have to come into our building to see real-time information

and can even synchronize attachments to the main database to keep managers up-to-speed on sales quotes and other progress."

Salespeople rely on ACT! for prospecting, quoting, and executing post-sales activities, such as sending e-mails or placing calls to customers to remind them to get equipment serviced. Automated processes within each of these activities drive additional sales without requiring much additional effort.

"Our salespeople love the integration with Outlook," said Tomlin. "It makes it easy to seamlessly e-mail quotes and manage customer interactions all within the ACT! interface."

Sales managers utilize ACT! for high-level sales graphing, funneling, and forecasting. With minimal effort, they can analyze the ACT! data and help sale representatives target the right opportunities and maximize sales quotes. Managers also frequently use the Opportunity List to assess the overall sales pipeline.

"Now we can see the entire opportunity list all on one screen, rather than by user," noted Tomlin. "Managers can quickly sort by column depending on what they want to know. They can view products by contact or opportunities by product. Whatever they want, they just click to sort."

Vermeer-Wisconsin uses ACT! to produce weekly sales reports showing how representatives spent their time and forecasting sales numbers for the coming week. By generating reports that list product codes, models, and serial numbers, managers can identify opportunities within the existing customer base for up-selling new models or complementary machinery.

These new capabilities in opportunity management and reporting help Vermeer-Wisconsin make more strategic decisions, not just in attracting and closing individual sales, but also in holistically managing the business.