

### The CRM Connection Provides An Organized Solution For The Betty Brigade

#### CUSTOMER

The Betty Brigade

#### INDUSTRY

Service - Personal

#### LOCATION

Ann Arbor, Michigan

#### Number of Locations

2

#### Number of Employees

7

#### SYSTEM

ACT! by Sage Premium

ACT! by Sage for Web

#### ADD-ON SOLUTIONS:

eMail Lead Grabber

Calendar View Plus

ACT! Hosting Service from

Remote Tech Group

The Betty Brigade will walk the dog, sort the mail, do the shopping, and pick up your dry cleaning—plus a number of other tasks. Sharon McRill founded the personal assistant and concierge company several years ago to put her organizational and project management skills to work. Today, the company employs seven individuals and has recently opened a second location. What tools do the organizational experts use to stay organized? ACT! by Sage Premium and the talented consulting team of The CRM Connection.

#### Find An Ideal Solution

Within a year of starting the company, McRill recognized the need for a powerful contact management solution like ACT! Premium Solutions. "I was using Microsoft Outlook—it worked alright for scheduling appointments, but it didn't give us the ability to store details about our client relationships," she says. "In this business, those details are very important."

With plans to hire additional staff for her growing business, McRill looked for a solution that would support a group



calendar, so that she could monitor and schedule her team's appointments. She also wanted to provide remote access to the software so that employees could access their messages and calendar from home. "A colleague made a compelling case for ACT! Premium," McRill says. "It is designed to do exactly what we want to do—track the details of our client relationships and organize our activities. The CRM Connection was able to customize the software to fit our specific needs."

#### Boost Your Service Levels

Delivering a consistently high level of service is the company's goal, and ACT! Premium Solutions support that goal.

#### CHALLENGE

The Betty Brigade had been using Outlook to schedule appointments, but it lacked the capability to track, organize, and access the important details of client relationships.

#### SOLUTION

ACT! by Sage Premium Solutions provide powerful team scheduling tools, a secure location to store unique client details, and access to data for the company's remote staff.

#### RESULTS

Client information is collected and stored in a single location, accessible to the entire team. Web-based access keeps staff productive when they are away from the office.

*“ACT! Premium Solutions are of high value to The Betty Brigade—it has become an integral part of the business. I call it my eighth employee.”*

Sharon McRill - President

The Betty Brigade

McRill engaged The CRM Connection to help her take advantage of the flexibility inherent in ACT! Premium Solutions—relabeling existing fields and adding new fields to hold data specific to her business. “We added a tab for the client’s pets which details name, age, description, and health problems or specific habits of each animal,” says McRill. “This is where ACT! Premium Solutions really excel—we have complete client details in one place, accessible by everyone.”

When one of The Betty Brigade’s employees heads to a client’s home, they can print a custom report that McRill designed to summarize the client’s information. “Our clients rely on us, and ACT! Premium Solutions give us the place to store and access the data we need to keep our clients happy,” McRill says.

### **Build Your Client Base**

The Betty Brigade recently began using ACT! Premium Solutions to help market its services. The CRM Connection added a new demographics tab to store details about existing clients such as marital status, religion, income bracket, and age group. “By analyzing the demographics of our existing clients, we can better understand what type person uses our services and can market to that demographic,” she says. For example, McRill learned that many of her clients are older and do not actively use the Internet. “That information led me to decide to continue my print ads in the local yellow pages when I might otherwise have discontinued them,” she adds.

### **Never Miss A Date**

ACT! Premium Solutions help the company efficiently manage the schedules of its seven-person team. “Our schedules can change radically from

day to day—appointments are added, cancelled, changed, or sometimes the scope of a task changes,” says McRill.

McRill loves the ability to color-code the schedules by individual. “By viewing all the activities of my team on one color-coded group calendar, I can easily see where we can fit in another appointment and see who is available to handle it,” says McRill.

The task reminders are another feature that The Betty Brigade appreciates. “Clients will ask us to remind them of an important event, so we simply set up a task in ACT! Premium Solutions and a reminder automatically pops up on the screen so that we don’t overlook it,” McRill says.

The Betty Brigade Web site allows clients to fill out a form and request a service. The CRM Connection implemented an ACT! add-on product called eMail Lead Grabber to help move that information from the Web site into ACT! Premium Solutions. Web Grabber generates an automatic e-mail response message to the client acknowledging their request and also schedules a call in ACT! Premium Solutions so that staff is reminded to call the individual and schedule the appointment.

### **Anytime, Anywhere Access**

By running both ACT! Premium and ACT! Premium for Web, The Betty Brigade has the security of redundant systems. If the power is out at the office for example, staff can work from home, accessing the ACT! Premium database over the Internet.

McRill concludes, “ACT! Premium Solutions are of high value to The Betty Brigade—I call it my eighth employee.”

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