



## Sage ACT! Case Study

### CASE STUDY: PORT OF LONDON AUTHORITY

#### The Background

The Port of London Authority (PLA) is the port authority for 150km (95 miles) of the tidal Thames from the sea to Teddington. It provides navigational, pilotage and other services for ships using the Port of London.

The Port of London comprises over 70 independently owned and operated terminals and port facilities which handle a wide range of cargoes. London is one of the top three ports in the UK and handles over 50 million tonnes of cargo each year. London is also an increasingly popular destination for international cruise ships.

#### The Need

The Port Promotion department is responsible for maintaining and developing relationships with shipping companies and other key players in the transport and logistics sector. They also co-ordinate the provision of facilities for international passenger cruise ships and attend trade exhibitions and conferences around the world promoting the Port of London.

An important part of the work of the department is to initiate opportunities and make introductions between shipping contacts and relevant service providers. The accuracy of information and follow up of enquiries and new opportunities is therefore vital. The PLA needs to have ready access to its customer information, allowing the effective management of all trade opportunities.

Another key requirement was identified within the Marine Administrative Support department. Here they are responsible for public consultation and for circulating regulatory and advisory information to port users. Previously, they used Outlook, Word and Excel to maintain distribution and contact lists, but found it was not possible to interchange information between systems and could not link them to Crystal Reports. PLA Information Systems project manager, Tony Wilkinson stated,

***"We had too many different files, lists, and spreadsheets. We were duplicating contact information, had some inaccurate content, and were not as efficient as we could be."***



#### The Solution

The PLA took the initiative and began by looking at reasonably priced solutions and purchased a single user copy of ACT! for evaluation. After discovering the product met requirements, was easy to use and was an economical solution, they selected Preact as their ACT! partner and began the implementation process.

Although ACT! is a box-standard product, Preact have carefully personalised the software to cater to every business user individually. Thrilled with his selection, Tony Wilkinson says,

***"Preact offers a fantastic package for installation, consultancy, and training. They went through our requirements and structured a solution to meet our needs. Starting with the initial consultancy and workflow document, we were taken through step-by-step, from having the database customised, configured, and installed - to being trained and having continued technical support."***



ACT! delivers industry-leading contact and customer management to individuals and organizations involved in selling, relationship building and other functions where management of contact details, activities and communications is critical. The product enables users to instantly access contact information; manage and prioritise activities; track contact-related communications; and generate reports for a complete view of customer interactions.

The PLA started using the product 2 years ago and have been benefiting from ACT! and the expertise of Preact ever since. Tony Wilkinson continues,

***"I deal with a lot of suppliers but the Preact approach is wonderful and their helpdesk is very good. We are pleased with our relationship and I'd recommend them to anyone with contact management needs."***

## The Result

The PLA has experienced very positive results from ACT! which ultimately have an impact on the entire organisation - not just the Port Promotion and Marine Administrative Support departments. There is a requirement to follow strict procedures including record keeping and maintaining a robust audit trail. The use of ACT! supports PLA ISO 9001 certification procedures to demonstrate and ensure that contacts and enquiries are followed up in a timely manner.

John Carr, marketing manager explains, "Previously, someone may have contacted us about a future shipment and in a year later it may not have been followed up as fully as it should. But, using ACT! helps ensure nothing falls through the cracks."

***"Once we finish the main implementation, the task of maintaining records will be cut considerably - saving time and resources."*** says Tony Wilkinson. ***"Record keeping will be improved, with better accuracy of contact information, and we'll be maintaining just one main contact list in each department rather than several."***

The Port Promotion department is one of the primary users of the product. It has taken the database beyond trade enquiries and uses it to keep track of other key contacts. It is used to help manage events; for providing information; and for networking. ACT! also helps with data protection since all customer information is now in one location.

One element of the very varied work of the Port Promotion department includes attending exhibitions and visiting potential customers abroad. On these occasions it is vital to take their database with them. Head of Port Promotion, Geoff Adam explains,

***"I use the calendar feature of ACT! to schedule and view appointments when I am away, add customer details to my laptop and then synchronise once I'm back in the office."***

ACT! is also used for maintaining details of consultation and notice and publication circulation groups. "We must get the information out to the correct addresses and people. Consultation is an integral part of our role," says Captain Julian Parkes, Marine Administrative Support Manager. "Communication with port and river users is vital for the PLA thus prompt contact through e-mail or hard copy using mail merging and label lists are an everyday part of the department's activity."

## Return on Investment

**ACT! is providing the PLA with a streamlined solution to diverse contact management; marketing; and regulatory needs. It also ensures London maritime businesses are profiting from the business sent through by introductions generated by the PLA.**

There has also been buy-in of the product by staff users. Phil Harris, Trade Development Manager, proclaims: "I am a faithful pen and paper person but have started to change my ways since it was installed."

***"It's easy to use and offers great organisational benefits. I am a big fan of ACT!"***

ACT! and Preact are saving the organisation valuable time and resources at a reasonable price. Tony Wilkinson concludes,

***"I like cost effective software solutions and when I see how much some cost, ACT! is a refreshing change. Some say it offers more bang for your buck and I say it offers more punch for your pounds. It wouldn't surprise me if even more uses for ACT! are identified in the future."***

**Find out how ACT! and Preact can improve your effectiveness and productivity. Call our sales team on 0800 381 1000 to discuss your contact management requirements**



## ABOUT PREACT

Preact is an independent Customer Relationship Management (CRM) consultancy working with businesses in the private sector as well as charities and educational organisations.

As multiple award winning CRM architects, we've been helping businesses achieve success from their CRM strategy since 1993. Our experienced team combine strong consultative skills with professional implementation skills and a commitment to customer service excellence.

By working with Sage ACT! and Microsoft Dynamics CRM we offer vendor-neutral advice to help organisations select the most effective solution for their unique requirements.

## OUR APPROACH

We take a product agnostic approach to pre-sales to help you choose a CRM solution that will meet your immediate requirements and support business growth. Our consultants will discuss your plans in detail and help you test our recommendations.

Our efforts are focused on developing long term business relationships and we're committed to an on-going evaluation of our performance. We actively seek client feedback to ensure we're delivering on our brand promise of exceeding customer expectations. We were proud to receive the 2011 Sage Circle of Excellence award in recognition of the quality of our service based on independently collected feedback.

All of our implementation team hold the highest accreditations, including Microsoft CRM Implementation, Customisation and Developer Certifications, Microsoft Surestep Project Management, Prince2 accreditations & Scribe Certification ensuring that every requirement is expertly managed at each stage.

We offer a full range of pre-sales, technical consultancy, training and support services to cover every step of your CRM project.

Our recent projects have included implementations for John Lewis Plc, Toshiba Air Conditioning, East Berkshire College, Scottish & Southern Energy, Cranfield University & Europe's largest ACT! implementation for Oxford Instruments Plc.