



Sage ACT! Case Study



CASE STUDY: VACHERIN

The background

Vacherin is a high-end in-house catering company. They provide innovative and sophisticated catering solutions for clients across The City and West End of London.

When their business development director, Phil Roker, contacted us, they had been trading for two years. They had built up a base of around 600 customers in addition to a growing list of prospects and were trying to keep track of all of them using Access. However its lack of scheduling facility and poor note logging capability was holding them back.

Phil was fairly new to the business and saw the need for a dedicated CRM system as a high priority. From his research, he identified ACT! as a potential solution and their IT support company, Appichar, recommended he contact us.

The challenge

Vacherin had around 1,500 contacts on their Microsoft Access database, which needed to be migrated into the new CRM system along with information from several spread-sheets.

Phil was keen for several members of staff to be able to use a central database from their own machines, with the ability to add and review detailed notes for each contact and schedule follow-ups with reminders. He specifically wanted to improve their ability to keep track of all communications and dealings with each sales prospect, and to be able to set up multiple contacts within a company. He was also hoping for better search and filtering facilities, for example to quickly pull up all companies within a certain category. In addition he wanted the ability to set up mail merges with ease.

He wanted to achieve all this while keeping costs to a minimum.

Our solution

Our pre-sales consultant, David Brettell, visited Vacherin to demonstrate ACT! and Phil and MD Clive Hetherington were impressed with its ability to fulfil all their requirements within their budget.

They were sold on ACT!'s exceptional ease of use and its capacity to help them build up a picture of each contact as an individual and share that information across the team. Phil also liked the fact that we could set him up to use the system from home, so he could access it remotely even when he couldn't get in to the office.

We arranged to spend three days on site installing the software, transferring data, customising the database and carrying out user and administrator training.

The result

Phil described their requirements as "fairly simple". However, he added, "we were importing information from several Excel spread-sheets, as well as Access data, and were very impressed with the way Preact managed the process".

They found ACT! just as easy to use as they'd hoped and experienced some unexpected benefits too. "The ID/Status field is incredibly useful for viewing different groups of contacts, so we're now using ACT! to keep data on our existing customers, friends and suppliers, whereas originally we'd expected to just use it for prospective clients."

Vacherin have reported that, thanks to ACT! they can now keep much better track of interactions with clients and prospects, communicate more effectively with contacts via emails and mail merges and keep more comprehensive notes on each customer, including multiple contacts for each company.



"With ACT! everyone can go onto the system before they speak to a contact and see in-depth information about the interactions other team members have had with them. This adds continuity and helps us as a company build meaningful relationships with individuals".

***Phil Roker, Business Development Director
Vacherin Limited***

Phil told us "Access was very two-dimensional, so you could only really see the details of the main contact at each company and the results of the last conversation we had with them. ACT! holds so much more information and makes it easily accessible, and also integrates seamlessly with other programmes like Outlook."

He has personally found this interaction between ACT! and Outlook very useful. "I was surprised and impressed to find that when I send an emails as normal in Outlook, ACT! somehow records it and saves a copy under the contact, including any attachments. ACT! also makes it easy to send out group emails to targeted segments of our customer base.

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Vacherin put a strong emphasis on corporate social responsibility and this feature of ACT! has proved useful here. Phil explained, "ACT! allows us to keep very comprehensive notes about each customer and prospect, like what their partner does for a living and where they just went on holiday. This really helps to develop and deepen our relationships with clients new and old.

"Most of our corporate social responsibility focus is on the environmental side - the sustainable sourcing of food. But ACT! helps us demonstrate that we really care about the people we deal with, which is important for the social side of CSR."

Phil enthused "We're completely happy with the software, implementation and training solutions Preact have provided. "I was particularly impressed with the way you created the main screen to add fields to suit our specific requirements. And the training got us all completely up to speed so we were up and running on it straight away".

Vacherin opted to take out a 12-month technical support contract with us and overall everything has gone very smoothly. Phil told us "In general, ACT! doesn't need much administration and seems to keeps itself ticking along".

The future

The changeover to ACT! has made it much easier for Vacherin to track sales activity and communication with current and potential customers. They look forward to continuing to have a better overview of their clients and prospects as the business grows.

Phil concludes, "I would definitely recommend ACT! It's a very simple system to use and ultimately makes our lives easier by holding so much information in one place. In fact it does everything we could have wanted, apart from actually making the appointments and sales for us!".

About Preact

We're a team of independent customer relationship specialists. Because we offer a range of CRM software from different providers we can supply the optimum solution to meet your needs. We'll also install and customise it for you, migrate your data and train your team to make the most of it.

To arrange a free, no obligation meeting to discuss how we could help you, call us on 0800 381 1000 or email us at sales@preact.co.uk.





ABOUT PRACT

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 independent 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.