

Sage ACT! | Customer Success



Challenge

Ethan Allen Medical Search has used ACT! with success for years. However, numerous databases and inconsistent customization were keeping the company from maximizing its use.

Solution

The company sought the help of an ACT! Certified Consultant* to help it clean and consolidate its database and upgrade to the latest version of ACT! Premium.

Results

Staff is able to instantly locate candidates meeting specific attributes to create call lists or reports. Both in-house and remote staff have fast access to a shared database, promoting a high level of collaboration.

Customer

Ethan Allen Medical Search

Industry

Medical Placement

Location

Latham, New York

Number of Locations

Three

Number of Employees

Eight

System

ACT! Premium

Note: Beginning with the 2011 version, ACT! by Sage is now called Sage ACT! and ACT! by Sage Premium is now called Sage ACT! Premium.

ACT! by Sage Premium Is Ideal Placement for Ethan Allen Medical Search

Ethan Allen Medical Search is a career placement firm respected for its ability to find ideal candidates for its healthcare industry customers. Established in 1967, Ethan Allen Medical Search is one of the leading search firms in the Northeast. This client-driven firm relies on ACT! Premium to track the details surrounding its candidates and clients, enabling it to find the perfect match, every time.

“ACT! Premium gives us a leg up on our competition,” says Linda Rennie, vice president of operations for Ethan Allen Medical Search. “We all use it and keep everything in it. It’s both user friendly and technologically advanced.”

Ready For On-the-Job Training

“We began using ACT! by Sage more than 11 years ago,” continues Rennie. “As we grew, we’d add new ACT! databases to isolate subsets of our clients and candidates. Eventually we ended up with nearly 30 separate databases, 13 of which we were actively using.”

Rennie reports that the company wasn’t using ACT! to its fullest potential. “We were using ACT! intensely, but hadn’t really thought through the ramifications of some of what we did, and as a result we got ourselves in a bit of a bind,” she explains.

The Search Is Over

To get assistance consolidating the multiple databases and the training that she and her staff needed, Rennie contacted a local ACT! Certified Consultant. “He came in, saw how we worked, asked questions about what we wanted from the system, and made some great recommendations,” Rennie recalls.

Among the consultant’s recommendations was for Ethan Allen Medical Search to upgrade from ACT! 2000 to ACT! Premium to take advantage of the inherent scalability, workgroup functionality, and streamlined

customization capabilities. As part of the upgrade, the consultant worked with the staff of Ethan Allen Medical Search to develop a plan to consolidate the 13 active databases into four databases configured to logically represent the divergent data they would capture. "Our consultant was phenomenal. He performed the upgrade over a weekend, so there was no downtime," Rennie recalls. "What he did makes so much sense, and works so well for us—we're enormously grateful."

Find the Answers

ACT! Premium holds the details of the company's client relationships. Custom fields record details like the number of hospital beds, number of staff, and various affiliations—all information that helps the staff make a successful match between candidate and client. "Having that data in one location makes us all more efficient," says Rennie. "We don't have to go looking for answers; they're in ACT! Premium."

The staff of Ethan Allen Medical Search uses ACT! Premium to help them quickly identify potential candidates in response to a client's request. "Using the lookup feature, we can zero in on candidates in a certain state or county, those with a specific license, or those with a certain number of years of experience," says Rennie.

The company purchases medical licensing lists detailing newly licensed professionals, and imports those lists into ACT! Premium. "We can then search for very specific data that helps us locate potential candidates," Rennie explains.

Once a group of potential candidates is found, staff can send an email to the group with details of the job placement, or create a call list to make it simple to personally contact each candidate.

Share the Information

Using a mail merge template Rennie created, staff is able to instantly create a Candidate Report, detailing the candidates' experience and other particulars and email that report directly to the company's clients. "It's quick and easy, and ACT! Premium keeps a record of the correspondence," explains Rennie.

**Certified Consultants are third-party vendors. Sage and its affiliates are in no way liable or responsible for claims made related to the services provided by third-party vendors.*

About Sage ACT!

Sage ACT! makes it easy for you to have meaningful conversations with customers by giving you an organized view of the people you do business with. Like the millions of individuals in small businesses and sales teams who use Sage ACT!, you'll always be prepared with recent emails, meeting notes, task reminders, and social media profiles, because all of these details live in one place. You can even use Sage ACT! like a sales and marketing assistant to get the right leads, send striking marketing campaigns, and track your overall performance. The bottom line, Sage ACT! takes care of the administrative stuff so you can focus on building long-lasting, profitable business relationships.

About Sage North America

Sage North America is part of The Sage Group plc, a leading global supplier of business management software and services. Sage North America employs 4,000 people and supports 3.1 million small and mid-sized business customers. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 13,100 people and supports 6.2 million customers worldwide.

"We feel that ACT! Premium and our experience in the industry give us a competitive edge. We are thankful to have ACT! Premium working for us."

– Linda Rennie
Vice president of operations
Ethan Allen Medical Search

Similarly, when one staff member identifies a candidate they want another staff member to be aware of, they simply email the Candidate Report to them. "We can generate the report in RTF (Rich Text Format) or Adobe PDF which makes it easy for anyone to open and read," says Rennie.

Collaborate as a Team

Ethan Allen Medical Search has two staff members who work remotely from offices across the region. Each is able to access ACT! Premium securely over the company's server to get the information they need to do their jobs. The Group Calendar function within ACT! Premium makes it easy for the staff to share their calendars and schedule appointments for one another.

Put ACT! Premium to Work

"We're in the middle of a record-setting year," concludes Rennie. "We feel that ACT! Premium and our experience in the industry give us a competitive edge. We are thankful to have ACT! Premium working for us."