Sage ACT! | Customer Success

Challenge	Solution	Results
Chemical Distributors, Inc. is a busy chemical and equipment distribution company that requires a Contact and Customer Manager to help support better customer relationships and provide better sales tools to its staff.	Upgrading to Sage ACT! from Microsoft Outlook gives Chemical Distributors, Inc. a single, centralized database that provides a more efficient process for reporting. It also gives real-time access to information for multiple users.	The centralized database allows easy accessibility and up-to-date account information for all sales staff members. Management insights into the sales pipeline improve sales efficiency and support production forecasting.

Sage ACT! Helps Provide Greater Opportunities for Chemical Distributors, Inc.

Chemical Distributors, Inc. (CDI) is an independently owned and operated chemical and equipment distribution company out of Buffalo, New York. Established in 1953, CDI supplies the Northeast, and parts of Pennsylvania, Ohio, West Virginia, Illinois, and other select markets.

Prior to using Sage ACT!, CDI relied on paper files and Microsoft® Outlook® to manage contacts and customers. Frustrated by the lack of sales follow-up and accessible information, CDI began to research solutions to support better customer communications and sales efficiency. The company needed a Contact and Customer Manager that could organize its customer information and would be easy to use so the sales team could quickly adopt the solution and then turn their attention to building long-lasting, profitable business relationships.

"We needed to get things together," explains Rick Franclemont, Sales Manager for CDI. "We did a lot of research and tried GoldMine®, as well as other CRM solutions on a trial basis. Other solutions did not have personalizable abilities and the functionality Sage ACT! was able to provide.

"Sage ACT! has been extremely beneficial to CDI," says Franclemont. "I personally use Sage ACT! from 4 or 5 in the morning to 8 or 9 at night—every hour, every day!"

Customer
Chemical Distributors, Inc.

Industry
Chemical and Equipment Distribution

Location
Buffalo, NY

NUMBER OF SAGE ACT! USERS
11

System
Sage ACT!

No More Missed Opportunities

Being able to access real-time customer information with Sage ACT! has allowed CDI to better communicate with their customers, as well as support sales productivity and increase sales opportunities.

"One of the biggest problems in our sale organization was the lack of follow-up and current creditable information," recalls Franclemont. "Sage ACT! has allowed the whole organization to enter customer information and to have that information available at everyone's fingertips.

"With Sage ACT!, we do not miss opportunities anymore— opportunities to say thank you to our customers, opportunities to take another order," says Franclemont.

Sage ACT! gives CDI total visibility and control of their sales pipeline so they can better manage their sales efforts. "Sage ACT! allows me to keep track of my sales teams," explains Franclemont. "One of the best things about Sage ACT! is the follow-up button—it allows our sales team to never miss an opportunity."

Useful Reporting and Data Capabilities

Sage ACT! provides a robust, flexible, and rich set of abilities to meet almost all user reporting and data extraction needs. With Sage ACT!, CDI is able to design views, add fields and tabs, edit drop-downs, and customize templates to fit the company's ever-changing business needs. Personalizing Sage ACT! allows CDI to capture the data they need so they can run valuable reports.

CDI personalized Sage ACT! by incorporating Crystal Reports® and dashboards to manage sales prospects and progress. With personalized reports, CDI is able to increase the value added benefits of the built-in reporting function in Sage ACT!.

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—Rick Franclemont
Sales Manager
Chemical Distributors, Inc.

Personalized reports are automatically emailed to sales management teams every morning. "Sage ACT! makes it so I don't have to think about what I am going to do," explains Franclemont. "I wake up in the morning and I hit my task list and Sage ACT! tells me all my phone calls and all my emails that I have to do for the day!

"We run five daily reports with Sage ACT! and about four to five weekly reports that are sent to all department heads," says Franclemont. "Sage ACT! reporting has reduced the amount of paperwork immensely."

CDI has also been able to improve their accounts payable department with Sage ACT! reporting and data capabilities. Franclemont explains, "With Sage ACT! reports, we have been able to streamline our whole accounts receivable process."

Note: Customer is a participant in the Sage Customer Reference Program and may be eligible for participation-based incentives.

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 midsized 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.

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