

## Sage ACT! | Customer Success



### Challenge

Z-Axis needed a Contact and Customer Manager that would provide a more efficient process for reporting and real-time access to information in different territories, as well as a system that could support their marketing efforts.

### Solution

Sage ACT! provides full access to real-time information that can be easily accessed by multiple users. Z-Axis can develop high-quality email campaigns with Sage E-marketing for ACT!\*, a cloud-based email marketing service.

### Results

Sage ACT! allows users to stay on top of valued customer information that is easily accessible by all users, enhancing client-customer relationships. Users may also utilize Sage E-marketing for ACT!\* to help increase marketing efficiency.

### Customer

Z-Axis

### Industry

Litigation Consulting Firm

### Location

United States/  
United Kingdom

### System

Sage ACT!

### Add-On Product

Sage E-marketing  
for ACT!

## Z-Axis Improves Company Communication and Increases Marketing Efforts with Sage ACT!

Founded in 1983, Z-Axis is a highly acclaimed legal presentation and trial consulting firm. Z-Axis is known for its trial presentation and forensic animation expertise in aviation, patents, engineering and construction, biotechnology, and disasters and catastrophic events. The company has produced presentations for many high-stakes landmark cases, including The Oklahoma City bombing trials, the Crash of Delta Flight 191, Eolas vs. Microsoft, and The World Trade Center litigation.

When deciding on a Contact and Customer Manager, Z-Axis looked at a number of solutions including Microsoft®, GoldMine®, and Salesforce® before choosing Sage ACT!. Z-Axis executives felt that Sage ACT! was better suited for their needs based on the available features, ease of use, and the additional benefit of the connected service Sage E-marketing for ACT!\*. This cloud-based email marketing service enables them to execute sophisticated campaigns, while leveraging and building on their existing Sage ACT! data.

Stephanie Kelso, President of Z-Axis, explains, "We interviewed several companies to compare their capabilities and the cost to upgrade to a new platform. We chose Sage ACT! because we like the features, there was less of a transition for our sales people due to its ease of use, and it was affordable."

### Email Marketing Campaigns Made Easy

Z-Axis was pleased about the opportunity to implement Sage E-marketing for ACT! as the company's primary email marketing service. Kelso says, "Using Sage E-marketing for ACT! to develop company marketing campaigns has been a big benefit!"

Prior to Sage E-marketing for ACT!, Z-Axis was using the email marketing service Constant Contact® for developing company email campaigns. Being able to streamline software applications has helped save Z-Axis a substantial amount of time and unnecessary effort. Kelso says, "Being able to do everything within one software program and not having to spend extra hours working with an artist has increased productivity by an estimated 10 to 15 percent, as well as advanced our marketing reach."

Sage E-marketing for ACT! provides Sage ACT! users with a better method for creating, delivering, and tracking email marketing campaigns while allowing companies to easily design branded messages from scratch, or import and edit existing templates using a simple online editor. Not only does Sage E-marketing for ACT! help manage campaigns, it also generates contact information within Sage ACT!, providing an easy, manageable method for tracking, reporting, and managing customer behaviors.

Kelso adds, "Campaigns are done more quickly with Sage ACT!."

### Personalized to Fit the Business

Sage ACT! allows users to customize the database fields. With Sage ACT!, Z-Axis is able to personalize Sage ACT! to meet their unique business needs by adding fields and tabs, editing drop-downs, customizing templates, creating new layouts, and modifying existing layouts.

"We customize the contact fields specifically for our industry," explains Kelso. "With Sage ACT!, we are able to develop personalized reports and marketing campaigns, allowing the company to market more efficiently and better manage our client relationships."

### Leveraging Contact Data with Office Integration

Sage ACT! has enabled Z-Axis to integrate their existing Microsoft Office applications. With this integration, Z-Axis can take advantage of familiar solutions while getting the full benefits of Sage ACT!. This helps Z-Axis further leverage their contact data by organizing all the details of their customer relationships in one place and eliminating double entry.

By integrating Microsoft Outlook® with Sage ACT!, Z-Axis is able to support better contact management by keeping calendars in sync, helping to coordinate schedules quickly and easily. Users are able to attach emails received in Outlook to Sage ACT!.

*\*Requires additional subscription.*

*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 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.

"Using Sage ACT! with Sage E-marketing for ACT! has expanded our marketing capabilities, improved our efficiency and productivity in sales, and allowed us to reach more people through one software program."

– Stephanie Kelso  
President  
Z-Axis

Microsoft Office integration also helps to manage contact records. Kelso explains, "Our address book from Outlook can be integrated into Sage ACT!. When we are sending an attachment, it will go to the contact history record in Sage ACT!."

Kelso adds, "We wouldn't want to be without it!"