Act! in the cloud holds the key to 'competitive collaboration'

act!™

Act! is well known for the productivity improvements it brings to businesses. However, by switching from a desktop to a cloud-based version, this firm of commercial real estate consultants discovered that it made their business better by enabling much greater collaboration among their team.

MGA

"We chose Act! in the first place because we wanted a CRM that would help us to better understand, track and qualify our prospects and clients, but without having to wade through all of the non-essential features."

Brian Pashkoff
Managing Principal

As a commercial real estate firm based in Washington DC, MGA, Inc. helps organizations develop and implement real estate strategies.

Its clients include non-profits, associations, legal practices and government contractors, as well as financial service firms and technology companies, and over the years the company has built a rich database of contacts, which it has managed and added to by using Act!.

"We chose Act! in the first place because we wanted a CRM that would help us to better understand, track and qualify our prospects and clients, but without having to wade through all of the non-essential features," says MGA's managing principal, Brian Pashkoff. "Act! lets us do that, which is why we chose it over other products from Microsoft and Salesforce."

From the start, Act! has given MGA's managers an accurate picture of whom anyone in the team is talking to at any one time. However, because everyone in the team was running a desktop version of Act!, each was creating a separate database on their own individual computers. That meant there was no central pool of knowledge about clients and deals that everyone in the team was able to access and share.

No duplicated effort

This could lead to duplicated effort, with different members of the six-strong team talking to the same person about the same deal. "That doesn't seem like a good use of time to me," says Brian.

So MGA decided to switch to a cloud-based version of Act!. This would give everyone access to a central database where every contact was being updated in real-time.

That made everyone immediately much more efficient and productive, because they could focus their activity with no overlap of effort.

Switching over from desktop to cloud was no problem at all according to Brian. "We'd been working with Act! Platinum, our Act! Certified Consultants (ACC), for over a year, so the systems were already right for the business and everyone was familiar with them. That made the transition very easy."

Moving Act! to the cloud made the team more productive immediately, "as we've now split all prospects into groups that are the responsibility of different team members," says Brian. That also avoids the possibility of irritating potential clients through multiple or repeat calls.

> " The cloud-based version of Act! is fostering a more collaborative environment. Now, if someone notices someone else speaking with or tracking a potential client and they have some good insider information, they share it."

Brian Pashkoff
Managing Principal

Much greater collaboration

But it is in another area that there has been the biggest change … collaboration. "That's where switching to the cloud has made a significant difference," says Brian.

"When you have separate databases it creates a potential rat race. So the desktop version made everyone overly competitive. We want our people to be competitive of course, but we don't want them feeding off each other. So information didn't get passed or shared around so much," says Brian.

"Now, if someone notices someone else speaking with or tracking a potential client and they have some good insider information, they share it. So Act! in the cloud is fostering a more collaborative, but still competitive environment."
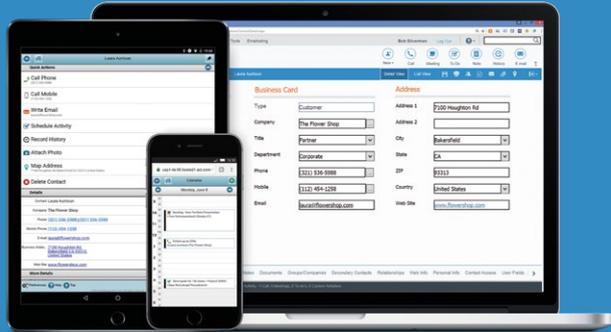
Results

- Act! has significantly improved collaboration within the business. Now information about clients and deals is shared and there is no duplication of effort.

- MGA chose Act! because they wanted a CRM that would enable them to understand a client's situation and track progress of deals without getting distracted by unnecessary, non-essential features.

- The similarity between the desktop and cloud versions meant that switching between the two was problem-free because everyone was already familiar with Act! and how it works.

Contact

Head Office / Arizona
Website: **www.actplatinum.com**

Toll Free Tel: **(877) 228-7528**