

SUCCESS STORY ACT!™

An ACTIVE Business Management Tool

KEY ACHIEVEMENTS

- Administrative time reduced by 50+ percent
- ACT! customized to fit the company's way of doing business
- Three contact databases consolidated into one
- Program works with huge database efficiently, quickly
- Advanced contact management features drive new business
- Complete integration with communication tools aids use of fax, e-mail, Palm® Powered handheld, and cell phone
- Open architecture enables use of external programs with standard database

TeamLegal ... cares

SPECIALISTS IN
LEGAL EXPENSE PLANS



CUSTOMER SUMMARY

- TeamLegal...cares based in Worthington, Ohio
- Markets legal expense plans via more than 200 independent associates
- Year 2000 sales up more than 200 percent over 1999; number of independent associates doubled
- Nearly 47,000 contact records
- 100+ MB database (compressed)

TeamLegal...cares owner Jeffrey Davis manages his 47,000 contacts and 200 percent sales growth quickly, easily, and efficiently with ACT!™ from Interact Commerce Corporation.

It's no secret that so many professionals use ACT! because of the way it turns their contacts into profitable relationships. Jeffrey E. Davis, the owner of TeamLegal...cares couldn't agree more.

Through TeamLegal...cares, Davis and more than 200 independent associates offer businesses cost-effective legal-expense plans for their employees. It's only through continuous contact with prospects, clients, and associates that Davis is able to strengthen the relationships his company's growth relies on.

THOUSANDS OF CONTACTS TO MANAGE

While many professionals work with a relatively small number of contacts, Davis has thousands – nearly 47,000 to be exact. He needs a contact management solution that offers speed, a rich feature set, customization, and an open architecture, all in an easy-to-use package.

“In a fast-paced business like mine, using the right tools is everything,” he says. “I wanted an intelligent contact manager that would be more than a passive repository for information. It needed to work with me in real-time, helping me make the most of every business relationship, each day. GoldMine wasn't customizable enough. Maximizer was too slow.”

ONLY ONE SOLUTION: ACT!

Davis's meticulous research and hands-on testing narrowed the field to ACT! from Interact Commerce Corporation. Davis calls the latest version “the fastest, most comprehensive, and most adaptable contact manager available. I've done my homework, and I know ACT! is the best thing out there.”

ACT! assists Davis in managing his calendar, contacts, to-dos, and all the critical information he relies on when developing new business. With ACT!, Davis easily:

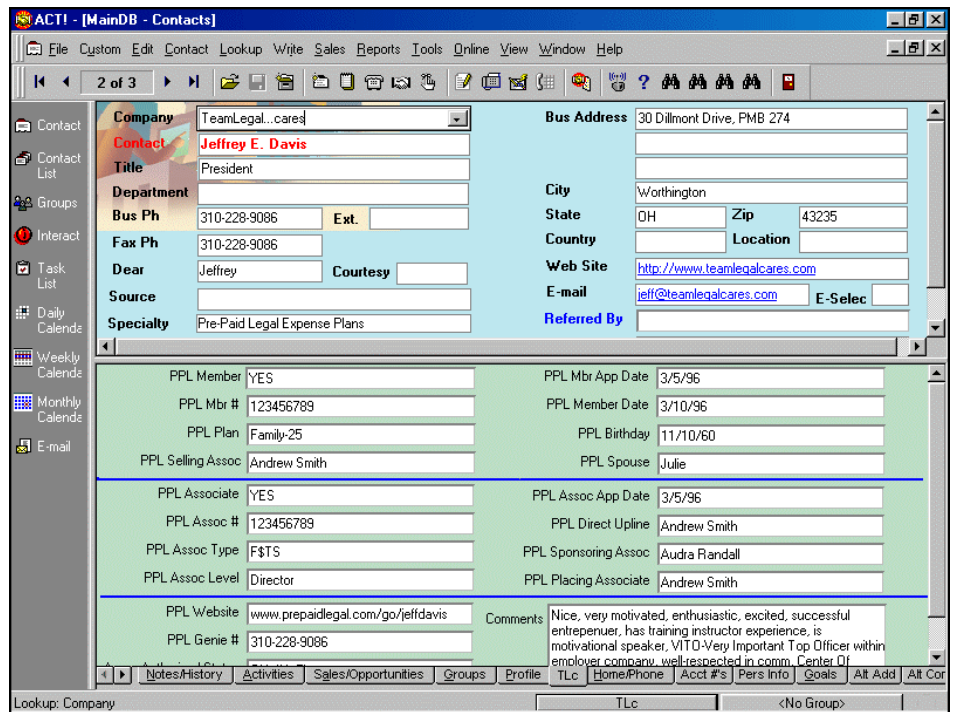
- Organizes contacts by groups and subgroups
- Searches his contact database by field or keyword
- Tracks follow-up phone calls, faxes, mail, and e-mail in the program's notes and history section
- Creates correspondence, proposals, and quotes to follow up on existing relationships and generate new business
- Schedules appointments and recurring activities, and
- Generates reports of activities and client or account status.

ADMINISTRATIVE TIME CUT IN HALF!

Davis estimates he's reduced by more than 50 percent the time he spends on administrative tasks.

“ACT! not only gives me the features I need, it's also very fast,” he says. “The faster I can complete administrative tasks, the more time I

Jeffrey Davis, president of TeamLegal...cares has customized ACT! extensively, even adding this tab. "Making these customizations was easy," he reports.



have to spend working with contacts, and the more successful my business becomes.”

Much of that efficiency comes from the ease with which Davis has customized ACT! to fit his business. While the program is ready to use right out of the box, fields can be added, screen layouts changed for a particular look and feel, the icon bar and menus modified, and macros created to automate repetitive tasks and save time.

“ACT! lets me modify the screens for my business,” Davis says. “I’ve added 14 client-specific layouts and set up 4,000 fields, most of which are indexed. Making these customizations was easy – much simpler than using other, less full-featured contact management applications. This ease-of-use, combined with its capabilities, set ACT! apart from the competition.”

“IT’S AN ENORMOUS ADVANTAGE”

When it comes to following up with contacts, Davis defines a series of activities designed to help him keep in

touch, and then automatically schedules those activities. “I follow up with each prospect, client, and associate 12 or 13 times each year via e-mail, voice mail, fax, or letter. When I want to add a contact, I simply select the appropriate group and ACT! immediately helps me begin monitoring that relationship.

“ACT! moves from being a good historical database to an active business management tool,” he continues. “Using ACT! is like having an assistant who directs me toward new business. It’s an enormous advantage.”

Davis also appreciates the program’s complete set of communication tools. Its built-in word processor helps him create documents. Integration with fax software enables him to send, receive, and manage faxes from within ACT!. And its e-mail interface enables Davis to view HTML messages, send e-mail by clicking on a contact’s address, and sort messages in various ways.

“I CAN’T IMAGINE MY LIFE WITHOUT ACT!”

While speed, ease-of-use, features, and adaptability were key reasons for selecting ACT!, the contact manager’s open architecture also attracted Davis. “Some contact management applications use a proprietary database. ACT! does not,” he explains. “This means I’m not only able to find scores of valuable add-on products that plug right into ACT!, but I can also view ACT! files from other applications such as Windows Explorer or Microsoft Excel. Those capabilities help make me more productive.

“Together, these unique features and capabilities single ACT! out from its competitors,” Davis concludes. “It’s the first program I open in the morning and the last one I close at night. It’s so critical to my business that I won’t use a program that doesn’t work with it!

“I can’t imagine my life without ACT!”