

Getting Your ACT Together

Back in 1991—not long after I started writing regularly for *QP*—I presented a seminar in Dallas with the local BCT as a sponsor. After sitting through the session, John Purtell, the owner of that BCT, mentioned that I might be interested in looking at a “sales software” product called ACT. If I remember right, the developer of this product was John’s neighbor, and the product was new enough that the company—then called Contact Software International—was eager to send me a free copy for evaluation.

In the years since then, Contact Software International sold the product to software giant Symantec, and ACT has become the top seller among PIM’s (Personal Information Managers) and CM’s (Contact Managers.) There are other good products in this category—including Goldmine, Maximizer and Telemagic—but for my money, ACT is still the best. And more importantly, ACT has become the literal backbone of my own business. I start every day by asking ACT to show me my “task list” for the day, and then I simply work my way through those tasks.

I don’t always finish every item on my daily list, but that’s OK because I’ve set it up so that any uncompleted task rolls over to the next day’s list. The bottom line is that I never lose track of anything I’ve entered into ACT, and that’s a huge benefit for any business person...especially a salesperson!

Three Components

Broken down to its basics, ACT is made up four components: a database, the tasklist, a calendar and a word processor. Everything starts with the database, and the first step in using the program is to enter in all of your contact information—company names, contact names, addresses, phone numbers, etc. The next step is to tell your database what you want to do next with each contact and when you want to do it. ACT lets you schedule three types of activities: telephone calls, appointments, and things-to-do.

One of the key features of the program is its flexibility, and I think I’m a pretty good example of a person who has adapted the program to his own needs. For example, I never use ACT’s calendar functions. I prefer to schedule all of my activities to the task list, because most of what I do is what ACT refers to as “timeless”—meaning that it doesn’t have to be done at a specific time of any given day. On a typical day, my task list is made up of 25-30 telephone calls and 4-5 things-to-do (which might range from writing a proposal to making travel arrangements for a seminar or client visit to writing my monthly column for *QP*.) I use ACT in conjunction with a paper calendar—a typical view-of-the-month format—and that’s where I keep track of my travel and “face-to-face” commitments. (More on that later.)

The Windows and Mac versions of ACT work a little differently. I’m currently using ACT 3.0 for Windows. (There’s a Version 4.0 out, but I tend to “leapfrog” application software updates unless I see something important being added. The refinements in ACT 4.0 seemed to be mostly Internet-oriented, and that doesn’t add much to the way I use the product. In terms of the interface and the way the database and scheduling functions work, versions W3.0 and W4.0 are very similar.)

The ACT “window” is split into two “panes.” The top pane holds all of the basic contact information, with fields for company name, contact name, title, phone and fax numbers, address, last results, and an ID/status field that can be used to “code” the contact by type. By clicking on the “lookup” title on the menu bar, you can search the entire database for specific records. For example, let’s say you have a customer named John Smith who works for ABC Enterprises in Chicago which is coded by type as a “manufacturer.” The most direct way to call up that individual record would be lookup/company/ABC Enterprises, but you could also access it in other ways, including lookup/first name/John, lookup/last name/Smith, lookup/ID/manufacturer, lookup/city/Chicago or even lookup/phone number/312.

If you’re looking for a specific individual record, these more “general” search criteria may require you to click through several other records to get to the one you want, but that’s only a matter of a couple of seconds. In another situation, though, you might want to send a special mailing to all of the “manufacturers” in your database, and lookup/ID/manufacturer would be just the ticket.

The Lower Pane

The lower pane of the ACT window contains seven tabs that allow you to switch between views. Five of these views give you access to alternate contact information fields, including several user-definable fields which allow you to add a considerable level of sophistication to your database. The other two views really represent the heart of the system: activities and notes/history.

Every time you schedule an activity—a telephone call, an appointment, or a thing-to-do—it transfers into this view, so when you're looking at a record, you can see everything you have planned for that contact in the future. And every time you complete an activity or add something to the "last results" field, it transfers directly into the notes/history view, so by switching to this screen, you can see everything that has happened in the past. You can also enter notes of any length into this field, which adds to the level of detail you can keep at your fingertips.

ACT in Action

Let's look at ACT in action. "Chris" is a quick printing salesperson, and on this particular day, she's out making cold calls. During the course of the afternoon, she walks into 15 offices, talks briefly with the "gatekeeper" in each one, and decides that 7 of the companies are worth following up with. On her cold calls, she makes sure to get the name of the printing buyer, and all of the correct address/phone information. Her basic strategy is to follow-up immediately with an introductory letter, and then call on the phone to ask for an appointment.

On returning to the shop at the end of the day, Chris fires up her computer and starts entering the information she's collected into ACT. Opening a new contact record requires only one mouse click, and even though she's not a great typist, entering the contact information takes only a few minutes per record. With three more mouse clicks, Chris opens up the word processor and calls up her standard cold-call follow up letter (which she has previously written and saved as a letter template.) ACT automatically merges the name and address of each new prospect with this standard letter, and all Chris has to do now is print and sign the letters, print, stuff and seal the envelopes, and then put them in the mail.

Her last step with each new prospect is to schedule the next activity—the phone call to ask for an appointment. For each record in this group of new prospects, she clicks on an icon which calls up the "schedule a phone call" dialog box, clicks on an icon within that box to call up calendar, and then clicks on the date on which she wants to make the phone call. She types a short note about the purpose of the call, and rates the activity as a high, medium or low priority. Then she puts that particular prospect out of her mind.

Now let's fast-forward to the day on which Chris has planned on making those calls. She comes into the shop in the morning, and with two mouse clicks she asks ACT for her task list for the day. Along with any other activities she has previously scheduled for that day, she'll find these 7 calls listed. With two more mouse clicks, she turns her task list into a "lookup"—which brings up the complete contact records for each customer or prospect she has something scheduled with today, arranged one-after-another like a card file. Now she simply works her way through the "cards" and completes each task, marking it as completed when she finishes, and then scheduling the next activity for each contact.

Key To Success

This single element—always scheduling the *next* activity—is really the key to using ACT (or any other contact manager) effectively. This is how a salesperson ensures that nothing falls through the cracks.

Let's say that Chris calls the first of her new prospects, and that person says: "I'm really busy this week, but we buy a lot of printing and I'm unhappy with the printer we've been using and I would be interested in getting together with you. Why don't you call me in two or three weeks." ACT makes it very easy for Chris to remind herself to make that call.

Here's another scenario: Chris has quotes out with 10 customers and/or prospects. As a sales manager, you certainly want her to follow up on all of those quotes. For one thing—as many salespeople have found—sometimes all you have to do to get the order *is to ask for the order*. For another thing, even if you don't get the order, you want to get feedback regarding why not. Again, ACT makes it very easy to schedule those follow-up calls and make sure they don't fall through the cracks.

Here's a third consideration: I wrote last month that I have nearly all of the customers and prospects in my own ACT database set up on "critical contact intervals." That means that I have established some time period that I don't want to let go by without either me hearing from these customers or prospects or them hearing from me. Chris, too, has quite a few "occasional" customers who don't order every month, but they are a valuable part of your business. ACT makes it very easy to maintain an appropriate level of contact with those customers.

Not Completely Paperless

I mentioned earlier that I use ACT in combination with a paper calendar. It's theoretically possible to avoid that by using ACT with a laptop or a palmtop and carrying it everywhere you go, but even ACT's designers seem to have considered that a poor option. In fact, they built in compatibility with a variety of Day-Timer, DayRunner, Franklin and Avery planning calendar formats, making it easy to integrate ACT with those paper-based systems. Chris can print her calendar for the day, the week, or the month, and carry that with her when she's out making calls.

Or, she can print her tasklist for the day, week, or month, which is what I do when I travel. In its default format, the tasklist carries the company name, contact name, and phone number for every activity scheduled within the time period of the report, along with a listing of all pending activities for those contacts.

Before leaving home on a speaking or consulting trip, I print a tasklist for the day(s) I'll be away, and then it's only a matter of making the phone calls—from my cell phone, from pay phones, hotel phones, etc.—and writing notes on those calls on the tasklist form itself. Then, when I get back to my office, I simply transfer all of that information into ACT and schedule the next activity for each contact.

Laptop Benefits

Many salespeople use ACT on laptop computers, and there are a couple of significant benefits to doing that. There's one significant limitation, though, and that's simply the time it would take to boot up the computer after every single sales call. To my mind, it's a lot more efficient to "travel light" and transfer information into the computer once or twice a day.

Having said that, using ACT with a laptop does provide a great deal of flexibility by allowing a salesperson to work from just about any location. One of my more successful clients starts each day in the office at about 8:15 AM by firing up his laptop and making telephone calls until 9:00 or 9:30 AM. He enters the results of those calls directly into the computer, and then, when he's ready to leave the shop, he prints a list of his appointments and the tasks that remain. During the course of the morning, he'll keep some of those appointments and address some of those tasks—making notes on his tasklist form—then at lunchtime, he'll fire up the computer wherever he may be and spend a few minutes updating his database. During the afternoon he takes care of the rest of his tasklist, including anything that requires him to go back to the shop. But he doesn't stop to update the computer during the afternoon; he holds off on that until he's at home in the evening, which really allows him to maximize the "selling" portion of the day.

Sales Management Benefit

I hope you'll see how a product like ACT can provide support and structure for a salesperson. Here's a significant sales management benefit it can provide as well—with ACT, it's pretty easy for an owner/sales manager to examine a salesperson's database to see exactly what's going on: who the salesperson is calling on, what the salesperson and his/her customers and prospects are talking about; what the salesperson has planned for the future with each customer or prospect.

Of course, all of that requires that the salesperson is conscientious about entering information into the database, but I would make it clear to my salesperson that that's simply a condition of employment! Any contact manager is a garbage in/garbage out proposition, but the other side of the coin in this case would be quality in/huge benefits out—for both the salesperson and his/her employer.

What does ACT cost? I've seen "street" prices in computer and office supply stores and catalogs recently ranging from \$149.00 to \$179.00. If you have to buy a computer to go with it, obviously that's a more expensive proposition, but it seems to be a pretty rare printshop these days that doesn't have at least one computer available for a salesperson's use. And if you don't have a machine available, there are "older technology" laptops available for less than \$1000 that would be more than adequate for running ACT.

One more question you might ask...is ACT hard to use? The answer is "no," although some salespeople may need some help in mastering some of the finer points of the software. The good news here is that there are hundreds of ACT trainers across the country, along with a selection of books, videos and interactive CD's. You'll find information about these training options inside the package when you buy a copy of ACT.

I know that many quick printers have expressed the hope that a salesperson would get his/her act together. ACT is one very solid tool to help make that happen!