



December 2007

Document **H102**

## **RESEARCH NOTE SAGE ADVICE FOR ACT!: PARTNERS ARE KEY TO SUCCESS**

### **THE BOTTOM LINE**

**Deploying contact management applications requires both technical expertise and a strategic vision. Often, a deployment's success hinges on the implementation partner. In its analysis of ACT! customers, Nucleus found partner selection and management was critical to success.**

Moving from a paper or spreadsheet-based contact management system to a professional contact management system such as Sage Software's ACT! often requires as much change management and industry experience as it does technical skills, so it's not surprising that many companies turn to partners to guide them through contact management solution implementations. In these cases, the skills and guidance of partners are often critical to their customers' success.

Nucleus Research recently conducted in-depth analyses of a number of ACT! customers as part of its development of two publications:

- *H95 Guidebook — ACT!*
- *H98 ACT! ROI case study — UCSC*

The analysis included companies in the US, Europe, and Asia from a number of different vertical markets including manufacturing, financial services, publishing, and business services.

Through in-depth interviews with these companies, Nucleus found those that were the most successful with ACT! chose a Sage business partner with both industry experience and positive references. Further success was achieved by leveraging the knowledge and expertise of the partners to plan, implement, and train users on their CRM solution.

Some ACT! consultants work with individuals or on small implementations only, while others handle corporate accounts. Some are focused on certain industries, while others have expertise in sales processes. Customers said Sage recommendations were a good first source for identifying potential implementation partners that could help them to be successful.

*As one ACT! customer said, "It's a long term commitment between you and your consultant. One thing you have to do is research your consultant's work history and expertise. Gather referrals on them. I'm staying with my ACT! consultant and they have my trust."*

**RELATED RESEARCH**

- H98 ACT! ROI case study – UCSC
- H95 ACT! Guidebook
- H81 SalesSalesLogix ROI case study – Mortgage Lenders of America
- H77 Sage SalesLogix Guidebook

ACT! customers leveraged partners' experience and expertise in a number of areas, including determining how to best:

- Import or integrate data from outside sources
- Plan networking and synchronization strategies
- Plan infrastructure upgrades or enhancements to support performance
- Schedule upgrades and patches
- Troubleshoot technical problems
- Structure ACT! reports

The ACT! customers analyzed in the Nucleus Guidebook engaged the following partners to support their deployments:

- AspenTech Consulting Group, Inc., [www.aspen-tech.com](http://www.aspen-tech.com), Plymouth, Michigan
- Computing Connections, Inc., [www.computingconnections.com](http://www.computingconnections.com), New Berlin, Wisconsin
- Design R1, [www.designr1.com](http://www.designr1.com), Tempe, Arizona
- On The Verge, Inc., [www.ontheverge-inc.com](http://www.ontheverge-inc.com), Quincy, Massachusetts
- Solarsys Microsystems PTE Limited, [www.solarsys.com.sg](http://www.solarsys.com.sg), KeyPoint, Singapore
- Winovative Technology Consulting, LLC, [www.winnovative.com](http://www.winnovative.com), New York.

**CONCLUSION**

There is no such thing as a bad contact management application — only a bad implementation. Partners play a key role in the success of many implementations, whether it's in guiding the delicate balance between customization and process change, recommending best practices for integration and technical implementation, and guiding training efforts to support successful user adoption. As Nucleus found in its analysis of ACT! users, the partner often plays a key role in the company's success. Companies looking to deploy ACT! or other applications today should carefully evaluate their partner strategy to ensure the partner has a track record, references, and relevant experiences their deployment and contact management strategy. Finding a partner with the right blend of expertise and leadership is clearly a key factor in maximizing ROI from a deployment.

*Nucleus Research is a global provider of investigative technology research and advisory services. Building on its unique ROI case study approach, for nearly a decade Nucleus Research has delivered insight and analysis on the true value of technology and strategies for maximizing current investments and exploiting new technology opportunities. For more information or a list of services, visit [NucleusResearch.com](http://NucleusResearch.com), call +1-781-416-2900, or e-mail [info@NucleusResearch.com](mailto:info@NucleusResearch.com).*