



CUSTOMER SUCCESSES

ACT! Helps MCG/Dulworth Improve Efficiency and Communication

In 1996, Management Compensation Group/Dulworth, Inc. (MCG/Dulworth – a Houston-based company that offers benefit plans to corporations) settled upon ACT! as a solution to its growing need to better manage mailing lists and sales contacts. Little did they know that – in just a few years – their staff would be using ACT! to help manage nearly the *entire* business...including strategic planning.

ACT! is at the Heart of MCG'S Scheduling and Communication

"I live on ACT!," says MCG President Chuck Bracht. "All of my correspondence and e-mail is done through ACT!. It's so client-centric, it's perfect for us."

When MCG first began using ACT! the primary objective was to streamline the management of its mailing lists and contact information. Gradually, though, MCG began to see the many advantages of incorporating more of its day-to-day business activities into ACT!.

"ACT! is at the heart of all of our follow-up," said Bracht, whose team includes 29 ACT! users. In addition to using ACT! for following up with clients and prospects, MCG uses ACT! for nearly all of its internal communication as well. All of MCG's meetings are scheduled using ACT! and resources such as conference rooms, LCD projectors and more are all reserved through ACT!.

Besides improving scheduling and communication, MCG has also been able to improve its efficiency by utilizing one of ACT!'s many customization features. The unique nature of MCG's business – specifically, the four distinct practice areas offered to clients – has allowed MCG to take full advantage of ACT!'s grouping capability. Each corporate client has its own "group" as well as unique "sub-groups" for each of the four practice areas so that all information can easily be referenced.

ACT! Improves Follow-Up As Well As Flow of Information

During the six-plus years since making the move to ACT!, MCG has realized a number of important benefits...but two stand out as being especially significant. First, MCG's ability to follow up with clients and prospects has been dramatically improved. "Our business requires a great deal of follow up," said Bracht. "ACT! has provided us with all the tools needed to make sure that follow up takes place. In short, ACT! has helped us lose fewer things through the cracks."

Key Achievements

- Helped MCG/Dulworth improve its strategic planning by centralizing client information and identifying cross-sections of target markets.
- Improved efficiency and reliability of follow-up with clients and prospects.
- Developed a customized layout for MCG/Dulworth, which incorporated new name and logo.

Customer Summary

- MCG/Dulworth an Apogee company has served Houston-area employers and families since 1952.
- MCG's mission is to help businesses, families and individuals attain their long-term goals through informed planning.
- Apogee offers four primary areas of practice for corporations: health & welfare benefits, retirement plans, compensation consulting and executive benefits.



The second significant benefit realized by MCG is a greatly improved flow of information. Today, for example, when an MCG team member wants to contact a client, he or she can instantly pull up a screen and find out when that client was last contacted, who made that contact...and what the outcome of the contact was. Previously, it was necessary to track down the person who last made the contact, which was both inefficient and unreliable.

ACT! Helps MCG Better Define Its Target Market

MCG's corporate services include four primary areas of practice: health & welfare benefits, retirement plans, compensation consulting and executive benefits. In the past, these four practice areas resulted in four unique marketplaces for MCG – each with its own set of criteria for determining what makes for a “good prospect.”

But once all of MCG's information was moved to one centralized ACT! database, MCG was able to realize another important benefit that it hadn't expected from ACT!.

By using the “client information” fields in ACT! – as well as their own data analysis – MCG's team members were able to identify those current clients and prospects that were targets for more than one of their corporate practices. This allowed MCG to better focus its activities...and more clearly define a target market.

“ACT! has helped us identify cross-sections and hone down our target market to reach all four of our corporate practice areas in a more efficient way,” said Bracht. “I'm not sure we would have been able to do that as well – or as quickly – without ACT!”

“Cornerstone has a great staff!”

MCG/Dulworth has been especially pleased with the results of their two-year relationship with Cornerstone Solutions. “Cornerstone has a great staff,” said Bracht. “Susan Clark is an incredibly responsive person. She and her team get results, and they have helped our company in a number of areas, not only in ACT! support and customization, but also in software training and database programming.”