

Purpose of Document

This document describes the differences between ACT! and Microsoft Outlook. These two products are different in terms of philosophy, positioning, and features.

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Summary

	<u>ACT!</u>	<u>Microsoft Outlook</u>
<u>Positioning</u>	Contact Manager	Desktop Information Manager
<u>Target Audience</u>	Sales Professionals and Small Business Executives	All computer users
<u>Purpose of product</u>	<ul style="list-style-type: none"> • Build relationships with contacts • Generate sales results • Grow a business • Share customer and calendar information with team 	<ul style="list-style-type: none"> • Organize information • Communicate and share information with workgroup • Integrate with MS Office
<u>External Focus vs Internal Focus</u>	Best for people who spend a lot of time with contacts <u>outside</u> their company.	Best for people who spend much of their time with co-workers <u>inside</u> their company.
<u>Strengths</u>	<ul style="list-style-type: none"> • Contact database • Linking of information to contacts • Automatic logging of history to contacts 	<ul style="list-style-type: none"> • Group calendars • Group task management • Ability to manage email

Outlook Overview

Outlook is positioned as a General Information Manager and is targeted for use by all computer users.

The focus of Outlook is on improving efficiency by managing people's personal information, and by helping groups to share information.

From the Microsoft web page:

- Outlook is software that lets you not only send, receive, and manage e-mail, but also manage your calendar and contacts, such as friends and business associates.
Moreover, you can also share your calendar with family and colleagues via the Internet.
- Outlook is a part of "Office", a suite of products combining several types of software for creating documents, spreadsheets, and presentations, and for managing e-mail.

ACT! Overview

ACT! is positioned as a customer and contact manager. The target audience for ACT! is sales professionals and others who are involved in a sales type of activity.

The focus of ACT! is to help people build better relationships with their contacts, generate sales results, and grow their business.

ACT! is the world's leading contact manager. As a result ACT! has special strengths in managing customer information and in linking calendars, history, files, and other types of information to the customer.

From the back of the ACT! box:

“They say that good salesmanship is a state of mind. That's only the half of it. The other half is building relationships by staying on top of your leads. ACT! provides complete customer and calendar management and puts key pieces of information in the hands of you and your team at all times. So you know exactly what to say and when to say it. ACT! puts information to work and helps you grow your business”

Is ACT! Right For You?

If you think of your customers as simply the information on the front of a business card -- name, address, and phone number – then you won't get the full value out of ACT!.

ACT! is far more valuable if you think of your customer as not only the information on the front of the business card, but also the notes you wrote on the back of the card, the spouse's name in the upper left corner, the history of the last three meetings you had, and the date of the follow-up phone call you just scheduled, the text of the proposal you sent last month, and so on. The more you need to know about your customers, the more ACT! will be useful to you.

Outlook Limitations

Outlook is aimed at organizing your personal information and sharing information and schedules with your co-workers. Outlook is not simple -- it is a sophisticated, complex program with a significant learning curve.

Outlook is not designed for people trying to build a relationship with contacts and grow a business. As a result, many basic contact management tasks are difficult or impossible in Outlook.

Key Contact Management Features Lacking In Outlook

1. There is no “phone call” activity in Outlook. You can not schedule an upcoming phone call with a client.
2. Outlook tasks (to-dos) have a weak link to contacts. A task can be assigned to a contact, but it will not be found on the contact record, and you can not go from the task to the related contact.
3. It is cumbersome in Outlook to link meetings with contacts in your database. Linked meetings are treated as email messages to be sent to co-workers.
4. Outlook does not automatically log activities to the journal (the history log). You must turn on journaling for each contact you add to your database.
5. Activities are only logged when an email is sent to the contact. Automatic journaling of activities is mainly designed for activities and task that involve your co-workers.
6. Outlook does not support “field history” so you will never know when your “prospect” became a “customer”.
7. Outlook has no quick data entry lists for fields. You must type everything in. ACT! supports drop down lists for every field and also supports “Autofill” typing for quick selection of values.
8. Outlook has a limited contact notepad. The notepad does not date- and time- stamp notes. Outlook does not log the name of the user who enters a note for a contact.

Key Contact Management Features Lacking In Outlook (continued)

9. Outlook does not allow you to edit a group of contact records. If a company moves to a new address you will have to edit each contact individually.
10. Outlook has no built in mail merge.
 - There is no word processor built in to Outlook.
 - There is no mail merge command in Outlook.
 - You can use the MS Word mail merge command and go through a series of steps to link a document to Outlook.
 - There are no predefined letter templates. You have to build your own in MS Word and link each one back to Outlook.
 - You can not select a group of contacts and then do a mail merge to them. Mail merge always goes to an entire address book or folder.
 - Only a fixed set of Outlook fields is accessible from MS Word. Custom Outlook fields can not be added to mail merge letters.
 - Form letters can not be accessed from Outlook. You will always have to open up MS word and run them from there.
11. Outlook does not support fax merge.
12. Outlook does not support email merge (sending a custom form letter to a set of contacts via email).
13. Outlook has no custom report generator. You can't track your business to see how you have been doing.
14. Outlook is less customizable than ACT!. You can't modify toolbars or menus. You can not modify the first screen of the contact layout (although you can add and customize additional screens).
15. Outlook ability to find and work with temporary groups of contacts is limited. You can filter, but it is difficult to search for a group of contacts (such everyone in Texas) and then another group of contacts (such as everyone in California).
16. The default ACT! contact form has 69 fields. The default Outlook contact form has 20 fields. If you want to store more information on your contacts you will have to customize Outlook.
17. Outlook does not support duplicate contact checking.
18. Outlook does not have a Company entity, it cannot be used for account centric needs .
19. Outlook does not track information on companies or groups. Outlook contacts are limited to a single web site field. ACT! contacts have one field by default, but you can add as many new web site fields as you like.

Working With Activities In Outlook

Outlook treats activities very differently than ACT!. Outlook activities are either linked to you or they are assumed to be linked with co-workers. Activities are not normally linked with external contacts in your database.

ACT! assumes that many activities will take place with people who are NOT your co-workers.

Example: Scheduling a Meeting with a Contact

Let's compare ACT! and Outlook when scheduling a meeting. Assume you just met a new customer and you want to schedule a meeting with them. The steps required are:

ACT!

1. Enter the contact information.
2. Click on the "schedule a meeting" icon.
3. Set the date and time.
4. Select a "regarding" from the list (or type in your own new subject).
5. Click the "OK" button.

Outlook

1. Enter the contact information.
2. Choose "New meeting with contact" from the Contact menu.
3. Now you:
 - A) Fill in the contact's email address. This requires several dialog boxes. If the contact is not on your company email system you will be required to enter "Display Name", "Email Address", and "Email Type".
 - B) OR, you get a message that says "this contact does not have an email address". Hit "Enter" to dismiss this message and move on.
1. Type in the subject in the "subject" field (there is no fast entry list).
2. Choose "Save" from the File menu.
3. Choose "Close" from the File menu.
4. You will now get a message that says, "Message has not been sent. Do you want to send it"?
5. Choose NO.

The meeting you just scheduled will show up on your calendar, but the following limitations apply:

- There is no way to go to the contact and see what meetings are coming up. You can only view them from the calendar. Note: You can overcome this limitation for selected contacts with "journaling".
- Any time you open the meeting then close it Outlook will ask "Do you want to send this meeting"?
- There is no way to mark the meeting as completed.

Working With Groups of Contacts In Outlook

ACT! users often work with a temporary group of contacts (called a Lookup). The idea is to locate the needed contacts (such as all the Hot Prospects in New York and Texas) and then do something with them (faxes to them, mail letters to them, call them, report on them, and so on). Outlook is not as effective as ACT! when working with temporary groups.

- You can filter your contacts in Outlook but you can not add any more contacts to the filtered set. There is nothing in Outlook to match the ACT! “Add to Lookup” function.
- Outlook has no way to filter out an individual contact. In ACT!, you can add or remove contacts from your lookup until you get exactly the set of contacts you need.
- Outlook has no way to edit a group of contacts. So, if all your contacts at a company move to a new address, you will have to edit each contact individually.
- There is no way in Outlook to search all contact fields at once. You must limit your search to individual fields, or you can go through a process to build up a list of selected fields.
- Outlook has no simple query by example form that you can fill in to look for multiple fields. You can achieve the same function using the Outlook Find Tool Advanced option and add the fields and criteria one field at a time.
- Outlook has no advanced Lookup tool to query the database precisely for the information you require whereas ACT! allows you to build and save complex queries.

Competitive Matrix

Legend: ● = Yes ⊙ = Partial ○ = No

Windows Contact Managers	ACT!	Outlook	Comments
Contact Database Features			
Industry-standard SQL database	●	○	Outlook uses MAPI (an email system) to hold all information including contacts.
Can customize the definition of the fields on the main contact screen.	●	○	Outlook standard fields can not be modified.
Can add additional customizable contact fields.	●	●	
Supports a variety of field data types such as text, numeric, currency, initial caps, and so on.	●	●	
Can require a fields be entered.	●	⊙	Requires programming
Able to define “Template” fields (such as ###-##-####)	●	⊙	Requires programming.
Maximum size of custom fields	255	255	
Can edit a group of contacts	●	○	
Can attach files to contacts	●	●	
History log records activities, faxes, emails, and letters	●	●	
Automatic history log for all contacts.	●	⊙	Must be turned on for each contact. Must send an email to log some activities.
Records “field history” (changes to field values)	●	○	
Unlimited notepad for each contact	●	●	
Notes are automatically date and time stamped	●	○	
Records the name of the user who enters a note	●	○	

Competitive Matrix (continued)

Data Entry Features	ACT!	Outlook	Comments
Imports contact data from ASCII and dBase file formats	●	●	
Can map fields on import	●	●	
Easily enter new contact at the same company	●	●	
When entering a new contact at same company can choose which fields are copied	●	○	
Editable drop down pick lists for all fields	●	○	
“Autofill typing” to choose values from pick lists	●	○	
Duplicate checking for contacts as they are typed in	●	○	
Can scan an entire database for duplicates	●	○	
Can select fields used for duplicate checking	●	○	
Has a “Salutation” field that can be set to automatically fill in first or last name	●	○	
Customizable Screens and Views	ACT!	Outlook	Comments
Supports a contact list view	●	●	
Can hide, display, move, and resize columns of list views	●	●	
Can click to sort columns of list views	●	●	
Can edit data directly on list views	●	●	
Can customize main contact form view (move fields around, add fields, delete fields)	●	○	Outlook does not allow the editing of the main form
Can add customizable tabs (sub-layouts) to contact form	●	●	
Can add and delete tabs (sub-layouts)	●	●	
Contact forms can include graphics and bitmaps	●	○	
Can build forms with custom colors.	●	⊙	Outlook colors are read from user window settings. They will be different for each user.
Can move toolbars to anywhere on screen	●	●	
Can modify toolbars	●	○	
Can modify menus	●	○	
Can add external programs or files to toolbars and menus	●	○	

Competitive Matrix (continued)

User Interface and Help	ACT!	Outlook	Comments
Supports drag and drop throughout	●	●	
Provides right mouse context menus	●	●	
Wizards for complex functions	●	●	
Contains animated assistant for help	○	●	
On screen learning guide, quick tour, or tutorial	●	○	
Groups, Account and Project Management	ACT!	Outlook	Comments
Can assign contacts to “groups” (categories, companies, projects)	●	●	
Can link contact’s notes, history, and activities to groups	●	○	
Groups are a second record type with it’s own fields.	●	○	
Second record type fully customizable (add fields, change field types and sizes)	●	○	
Attach notes to groups	●	○	
Attach files to groups	●	○	
Groups have their own history log	●	○	
Assign customized layouts to group records	●	○	
Searching and Lookups	ACT!	Outlook	Comments
Can quickly find a group of records	●	●	
Can expand or narrow an existing lookup (a temporary group of contacts)	●	○	
Global key word search (database, notes/history)	●	⊙	Outlook does not allow you to look in all contact fields at once.
Use wildcard strings in keyword searches	●	○	
Query by example form to easily enter multiple search criteria in one place.	●	○	
Boolean logic queries	●	●	
Sort contacts by multiple levels	●	●	
Reports	ACT!	Outlook	Comments
Prints address books in popular organizer formats	●	●	
Prints calendars in popular organizer formats	●	●	
Includes pre-defined business reports, such as activities completed by customer and source of referrals	●	○	
Report generator to build own custom reports	●	○	
Report generator support page header, group header, detail, group footer, page footer, summary, and subtotal	●	○	
Reports support custom graphics	●	○	
Key math and statistical functions for summary fields	●	○	

Competitive Matrix (continued)

Competitive Analysis – ACT! versus Microsoft Outlook™

Word Processing/Connectivity to MS Excel/Email	ACT!	Outlook	
Includes built-in word processor	●	○	
Built-in word processor includes spell checker	●	○	
Links to Microsoft Word	●	●	
One Click Export to Excel from any list view	●	○	
Supports mail merge from within the program	●	⊙	Outlook has no mail merge. Must us merge in MS Word.
Can limit mail merge to selected contacts	●	○	
Automatic letter, fax cover generation	●	○	
Will automatically generate history for letters sent	●	○	
Will automatically link letters produced to contacts	●	○	
Form letter generation with internal word processor	●	○	
Open documents attached to contact records	●	●	
Save inbound emails against the contact	●	○	
Automatically save outbound email against a contact	●	○	
Attach email in bulk against their appropriate contact	●	●	
Envelope printing	●	●	Requires MS Word
Label printing to Avery laser and dot matrix labels	●	●	Requires MS Word
Add graphics and bitmaps to envelopes and mailing labels	●	●	Requires MS Word
Print single label and specify label position	●	●	Requires MS Word
Add commonly used form letters to your menu for instant access.	●	○	

Competitive Matrix (continued)

Calendar/Scheduling/To-Do	ACT!	Outlook	
Day, week and month calendar views	●	●	
Floating three-month mini-calendar	●	○	
Can right click on any day of mini-calendar and get an explosion of the day's activities	●	○	
View and work with calendars at the same time as contact list	●	●	
Activities automatically linked to contact record	●	○	
Intuitive drag-and-drop rescheduling	●	●	
Activity prioritization	●	○	
To-do list of activities	●	●	
To-do list can be customized to display and sort on any column	●	○	
Schedule follow-up activity when clearing previous one	●	●	
Calendar displays cleared activities	●	○	
Clear all activities scheduled for a group at once	●	○	
Includes on-screen alarms with multiple snooze options	●	●	
Scan through several alarms at once	●	○	
Flexible options for scheduling recurring activities	●	●	
Support for multi-day activities (such as a vacation)	●	○	
Displays "banner" for multi-day activities	●	○	
Calendar printing to popular organizer formats (Avery, DayRunner, Day-Timer, DynoDex, FiloFax)	●	●	
Automatic conflict checking when scheduling activities	●	●	
Activity timer	●	●	
Address book printing to popular organizer formats (Avery, DayRunner, Day-Timer, FiloFax, Franklin)	●	●	
Telephone Integration	ACT!	Outlook	
Will dial phone numbers for you	●	●	
Automatic history generation for outgoing calls	●	●	
Automatic history generation for incoming calls	●	○	
Timer for incoming and outgoing calls	●	○	
Support for caller-id (go to contact based on an incoming call).	●	○	
Support for call forwarding, call transfer, and conference call.	●	○	

Competitive Matrix (continued)

Workgroup Features	ACT!	Outlook	
Can share contacts and calendars with other users	●	●	
ACT! Premium has full user and team based access control to data to retain confidentiality of data sharing	●	○	
Individual database password security	●	●	
Two way synchronization of data and attachments via the internet or office network	●	○	
Automation of synchronization and backup processes	●	○	
Private records	●	●	
Private activities	●	●	
Schedule activities for other users	●	●	
View calendars of other users	●	●	
View several users' calendars at once	●	●	
Send and receive contact records(s) via email	●	●	
Support for Microsoft Exchange	●	●	
Sends (optional) email notification when scheduling an activity	●	●	
Can send the full activity as an email attachment	●	●	
Supports iCalendar and vCard	●	●	
Support Options	ACT!	Outlook	
Contains "LiveUpdate" function to download enhancements and new releases	●	○	
Platforms Supported	ACT!	Outlook	
Available for Windows XP	●	●	
Available for Windows Server 2003 and 2008	●	●	
Available for Windows Vista	●	●	
Available for Lotus Notes	●	○	