



## **Contact Management Key to Successful Real Estate Company!**

***In ACT!, the best selling Customer and Contact Manager worldwide, Harcourts Hibiscus Coast has found the ideal sales tool, marketing resource, and customer relationship management solution for their business – resulting in improved customer service, business efficiency and profitability!***

The legacy of Harcourts dates back to 1888 and it now advertises its organisation as the fastest-growing real estate group in Australasia, currently with over 370 offices throughout New Zealand, Australia, Fiji and Indonesia. Harcourts attributes its ongoing success to brand, business and information systems, marketing tools and strategies and skilled staff.

Specialising predominantly in the residential real estate market, Harcourts Hibiscus Coast has been in operation for the past 8 years and has 36 staff operating out of two branches, one in Orewa and the other in Manly.

The company's success depends on the ability to consistently deliver results to clients – vendors and buyers alike, which means they require a robust method of managing all such relationships by tracking all associated communications, interactions and information.

### **Business Success with ACT!**

Colin Hair, Managing Director of Harcourts Hibiscus Coast originally considered the introduction of a contact management system as a means to capture and manage all vendor, buyer and property detail information. During the initial investigation phase Colin considered other well known Contact Management packages but decided that ACT! was the best solution for their business.

Hair says "Initially we wanted the ability to build our own company client database primarily to record important details such as customer contact and interaction information, a way to really manage our customer relationships, and we were able to do this via ACT!" ACT! has provided this and so much more.

### **Customising ACT! to Business Requirements**

Originally purchased and implemented in June 2002, subsequent customisation of the system has provided the team with a personalised layout, significantly different to the standard ACT! design, which assists them greatly in their day to day tasks; allowing them to conduct searches, run reports and access other real estate information quickly and easily, at the touch of a button.

### **Improved Efficiency with ACT!**

It is most important that a contact management system is user-friendly to ensure staff buy-in and utilisation of the system, resulting in improved business efficiency. With their current customised set up the Harcourts team finds their ACT! system particularly easy to use.

Hair comments "ACT! has improved business efficiency and productivity in several ways, we have found the template capability particularly useful including the fact that we can quickly generate standardised letters to clients."

### **Automating Business Processes**

The ability to automate several business processes has been of great advantage to Colin and his team. In particular the mail merge function has proved to be an invaluable marketing tool allowing them to easily generate and manage the distribution of the 1800 mail outs they achieve twice a year.

Says Hair "All information is interrelated, entered daily and weekly, we rely on the follow up prompts that are generated from a property settlement date. We use the settlement date and count back from that to set all the necessary reminders."

They can also automatically generate client letters relative to contracts and sales and purchases agreements.

**Partnering with Xact**

After Harcourts Hibiscus Coast made an initial enquiry with Xact Software Solutions, Xact arranged an ACT! presentation for the Harcourts team, and after discussions outlining what Colin and his team wanted from the system, Xact was engaged to implement and fully customise their ACT! solution.

Hair states, "We were impressed with Xact's ACT! presentation, their Consultants were great, very knowledgeable, and they were able to understand our requirements and offer full customisation to suit our business needs."

Hair concludes by saying, "ACT! works. It's doing exactly what we need it to do presently and it has become vitally important to the operation of our business."