

Workbase

Managing workplace literacy with ACT! by Sage



The power of ACT!

Adrienne Donne, Office Manager for Workbase, explains how they manage all their contacts and keep track of everything that's happening, "We're using ACT! for all our contact management across the organisation. We find it really powerful for the fact that we have people working in lots of different areas, who may be working with the same or similar people or certainly the same organisations".

Important is the ability to track what has been said to whom, who is meeting whom, who has received what publication or email, and so on. Donne says, "We've setup ACT! with a particular focus on its notes and history function, to be able to alert somebody in one area with work another team may be doing".

Workbase is divided into a range of business units, including:

- The programmes unit which delivers the workplace and business premises training.
- A professional development team that delivers professional development resources to trainers and other workplace literacy organisations.
- The sector development team that works on government-funded projects to upskill and increase the adult literacy sector.
- A consulting services arm that works at a personalised level, where a company may have a training arm themselves, but don't know how to deliver the literacy component. The consultants can provide help and advice on company documentation – even doing a needs analysis to identify areas of weakness for them.
- There is also a library and information services area, providing the largest specialist resource library for the adult literacy sector in New Zealand.

The Librarian might be working with someone from an organisation who is also working with the sector development team while also liaising with consulting services. To avoid double handling of the contact and duplication in data entry, ACT! allows everyone within the organisation to see what everyone else is doing. Currently 30 people across the entire business are using ACT! to manage all their contacts and the interactions they have with them.

ACT! by Sage, the number one customer and contact manager in the world, helps Workbase improve the rate of literacy and productivity within the New Zealand workforce.

Workbase was established in 1996 as the New Zealand Centre for Workforce Literacy Development. They are a non-profit organisation that works with business and industry groups, individual businesses and government agencies to improve the literacy, numeracy, language, information technology and communication skills of the New Zealand workforce.

Workbase was awarded the UNESCO International Reading Association's Literacy Award in 2001.

A fundamental part of their work is the provision of training programmes at workplaces. The organisations that deploy Workbase training programmes, appreciate the fact that a more literate, numerate and skilled workforce is a more productive workforce.

Another key part of their portfolio is the development of research and information on workforce literacy to inform government policy, public awareness and business and industry practice. Workbase provides a wide range of publications that are available in



hardcopy and electronically, that promote adult literacy and the benefits of a literate New Zealand workforce. To help get their message across Workbase works with other literacy providers and training organisations, helping them with professional development and the delivery of curriculum and teaching resources.

The range of relationships and contacts Workbase maintains is large and complex, where multiple contacts within an

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organisation may be working with a range of people and departments within Workbase. Vital to the efficient operation of each section and team within Workbase, is having a mechanism that allows them to manage those relationships and keep track of all communications and interactions.

Since 2002 they have been using ACT! to do just that.

One key feature that Workbase have found extremely useful is the grouping function. Donne comments, "We use the group functionality a tremendous amount. Just recently we had to mail out a letter and a new publication called The Economic Imperative, which went out to a number of key businesses, relevant members of parliament, all of our employer organisations as well as to our unions. ACT! allowed us to group all relevant contacts together and tailor the letter to meet the needs of each of those particular groups".

"And then the next time we write a publication, we'll be able to go back to that group and say these are the sort of people we sent this to and why we sent it to them."

Working with a partner they trust

To get the most out of ACT! and ensure all their people are trained to use it effectively, Workbase uses the services of Xact Software Solutions Ltd. Donne says, "We've worked really closely with Xact. We've been lucky to have a trainer and a consultant for the entire time we've had ACT! - they have grown and evolved with us and in the way we use ACT!"

"Right from the beginning Xact's level of knowledge and expertise was apparent. It was clear from the outset that Xact was credible, their knowledge of the product and presentation of ACT! to us was a key factor in us deciding to go with ACT!"

Xact Software was originally engaged by Workbase to install and customise ACT! 6.0 and to provide ongoing Administrator and User training and support. Xact Software has developed the ideal CRM solution for Workbase by automating their back up processes, providing mail merge add on products and automated cleansing of their address book. Training has been a particular focus for Workbase and Xact Software has continued to provide customised training for them as their business has evolved.

Donne comments, "Xact has been consistent in their relationship with Workbase by

- Keeping us informed of changes to the product.
- Inviting us to user group meetings
- Trying to ensure that our accounting systems are accommodated through their

invoicing."

"When we brought ACT! into the organisation we found it user friendly and we could adapt the fields to what we wanted. So now the original training doesn't match what we actually have as a system. We've been lucky that we have an ongoing relationship with a trainer who has grown with us, so when they do staff training for us our own individual customisations and requirements are incorporated".

ACT! and what it does for Workbase is vital to Workbase, in managing all of their communications, emails, letters, newsletters, meetings, and publications. Donne summarises, "I believe it is quite a critical area for us. We use it, all our contacts are in it, no one is using anything else. It's proven to be very powerful, because we can now see over five years, the history of the people who've been involved in the different seminars that we run, what sort of publications we've sent out, who has received our newsletter and with everything else we do".

Workbase intends to upgrade to version ACT! 9.0 in the near future and Xact Software will again work closely with their client to ensure the best CRM outcomes for their business.

About Sage Group

The Sage Group plc, an established FTSE 100 company, is a leading supplier of accounting and business management software solutions and services to 5.2 million small and medium sized clients worldwide. With over 13 000 employees, the Sage Group comprises market-leading businesses throughout Europe, United Kingdom, North America, South Africa and Australia.

Xact Software Solutions Ltd

Xact Software Solutions Ltd (Xact) is the leading provider of Customer Relationship Management (CRM) software and solutions in New Zealand. Xact is also New Zealand's largest ACT! Certified Services Company. A well established privately owned company, Xact is headed by Graeme Leo, Managing Director, an ACT! Certified Consultant. Graeme has over 15 years experience in IT Systems, data communications and CRM

applications.

Today Xact boasts an exceptional team of four fully qualified ACT! Certified Consultants (ACCs) providing nationwide service and support. A dedicated helpdesk service is Xact's biggest point of difference. For those outside the Auckland Metropolitan area Xact also offers remote assistance and interactive online training.

Xact partners with clients to provide a customised CRM solution, tailored specifically to the clients' business requirements. Xact assists clients to build better relationships with their own customer database and gain a competitive advantage.

Clients benefit from Xact's depth of experience, knowledge and expertise gained through years of designing and implementing CRM solutions. Xact has implemented CRM solutions for small to medium enterprises, right through to large corporates.

Xact's sound project methodologies and pragmatic approach ensures a successful CRM project outcome. The provision of first class consulting, implementation and support services enables clients to increase sales, improve productivity and boost profitability.



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