

Thank You



CLIENT: Kindergarten Parents Victoria

WHY DID WE CHOOSE A CRM?

We are a membership based organisation and we needed a CRM to replace our paper based tracking system for our 1200 members across the state.

HOW DID ACT TODAY SOLVE THE CLIENT ISSUE?

We had been recommended to look at ACTI by a person who had used it within their real estate business. We spoke to Rob who assisted us with our requirements.

There were two fundamental selling points for us with respect to using ACTI they were the ability to track our phone calls and email communications with our membership base as well as the history function.

WHAT WERE THE BENEFITS TO OUR BUSINESS?

The history function and tracking capabilities of the system has transformed the way we do business. Previously we had filing cabinets full of paper and to track down historical data pertaining to one of our members was tedious.

Now we have a system where we can view the members history at a glance, in fact anyone within our office can. We can pick up the conversation where we left off last time without our member having to go over the history. Before we use to have volunteers come in each week just to do the filing, having ACTI has had a huge impact on the administration side of the organisation. We now have empty filing cabinets!

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"Rob Dixon has been terrific, without him we would be struggling to function with the size of our membership base. He is easy to get a hold of and fixes issues quickly, we've recently upgrade our system and he was really great with that."