

Act Today assists Porter Davis Homes with their Swiftpage/ACT! by Sage integration

The Story

ACT! Consultants Travis Rosevear, Josh Noonan and Richard Milland of Act Today, one of Swiftpage's resellers, assisted [Porter Davis Homes](#) to create the best possible user experience between Swiftpage and ACT! by Sage.

Richard Milland sat down with Porter Davis Homes' senior management, project manager and IT to discuss prior challenges. The challenges faced included supporting remote display centres, getting sales staff on board, creating a culture of entering and reviewing results, follow-up strategies to ensure leads were not missed, post purchase marketing, IT and reporting.

During the meeting they outlined various models that could be used to support the display centres. They decided to go with Citrix because the environment was more suitable as it was already located online. The technical expertise needed to set this up came from Travis Rosevear and Richard Milland who were able to advise IT in the more technical aspects of setting up ACT! for this environment.

Together Milland and Porter Davis homes developed a training methodology to ensure the sales staff was optimising ACT! and updating the database on a regular basis. The sales staff appreciated the training that was offered to better understand and use ACT! effectively.

Milland assisted their marketing team as well to develop workflow processes to capture enquiries and send them out to the sales staff. They developed a process to automate the marketing through a series of workflows by using the product Swiftpage which enabled Porter Davis to record, track and follow-up seamlessly via generating activities for sales staff, e-marketing and SMS technologies.

The Act Today team, through Milland and Noonan, created a strand of Crystal Reports that automatically sends results to the managers.

This project was complicated and required the technical knowledge of several Act Today consultants working together. Many thanks go to Travis Rosevear, Josh Noonan and Richard Milland.

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