

# Master ACT! 2009 for Your Business

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## Why ACT! 2009?

ACT! 2009 is a popular contact management system for one or more users. ACT! 2009 will help you manage your data and activities associated with developing and maintaining relationships with the people (contacts) and companies you do business with - or would like to do business with. Many people use only the basic parts of ACT! 2009. This training will allow you to explore all parts of the ACT! 2009 system and make the management of your contacts more effective.

## What is Covered?

We talk to you first to see how you currently use Act! 2009 in your business. Normally, the following will be covered at a minimum:

- Add fields to the ACT! 2009 database to suit your data. Customise your ACT! 2009 dashboard.
- Import your existing contacts from other applications.
- Organise your contacts - access detailed contact information, use groups and companies to organise contacts, create queries to slice and dice your contact information.
- Stay in touch by sending individual emails / letters or use mail merge to send multiple emails / letters. Keep the contact history on ACT! 2009.
- Prioritise work and schedule activities using the calendar and tasks.
- Track sales opportunities from initial inquiry through closure. Automatically create follow ups to manage prospect through the sales process.
- Run and design reports to report on activity or milestones.
- Synchronise with mobile technology.

## What Happens?

The package consists of a series of 5 one - to - one hour long sessions with your trainer. You will together discuss your business by phone, discuss how you currently use ACT! 2009 and what you would like to be able to do. Using an online classroom, you can share your screen with your trainer, so support and instruction can be given in real time. You will be provided with exercises to practice the new skills and you have the opportunity to change your own documents if you would like. You will be given “How To .... ACT! 2009” guides after the sessions and exercises will be available to complete between sessions to reinforce your learning.

Up to 1 hour of ad hoc support will be available for 3 months following the final session.

## Cost?

The cost of the package is £350 including a headset.

## Interested?

To book your package, please contact

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