



## The Automated Selling Machine

Act! boosts productivity by automating key sales, marketing, and customer service tasks.

The logo for 'sw!ftpage' is located in the bottom right corner of the page. It is set against a large, solid orange circular background. The text 'sw!ftpage' is in a white, lowercase sans-serif font, with an exclamation point inside the 'i'.

# Table of Contents

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Turn Your Business into a Selling Machine .....	1
Meet your new personal assistant: Act! Smart Tasks.....	1
What are Smart Tasks? .....	1
Easily Automate Key Tasks .....	2
Increase Productivity and Efficiency in Sales.....	4
Time Marketing Campaigns to Maximize Results .....	4
Nurture Prospects Automatically .....	5
Deliver Outstanding Customer Service .....	5
Conclusion .....	6

## Turn Your Business into a Selling Machine

Act! helps you get more of the two things your business needs most—time and money—by automating key activities and unlocking a rich source of new leads. Act! includes powerful, yet easy-to-use functionality to help you turn your sales and marketing efforts into a consistent, systematic lead generation and selling machine. Use Smart Tasks to develop standard, automated workflow for scheduling sales activities and remembering important customer service tasks.

## Meet your new personal assistant: Act! Smart Tasks

Have you ever wished you had someone working behind the scenes to make sure that you provide current and prospective customers with the service they expect? Welcome to Smart Tasks, included in Act!.

Think of Smart Tasks like your personal assistant, sending emails for you and adding activities to your calendar automatically, based on directions you set out. Smart Tasks get the job done. You'll notice fewer small items on your to-do list and your customers will enjoy consistent, responsive service. Meanwhile, you can focus on the big sales opportunities and make sure prospects receive the personal attention required to close the deal.

### What are Smart Tasks?

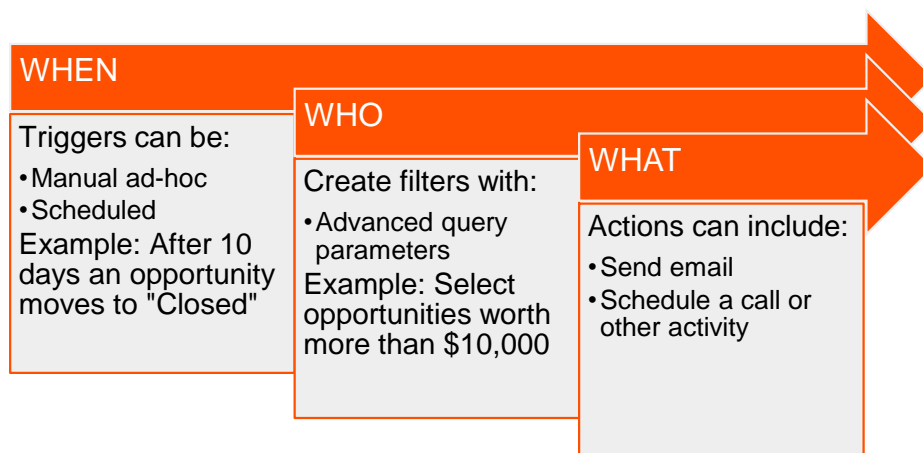
Smart Tasks are a series of common and connected steps, performed inside of Act!. Smart Tasks will set in motion the most basic or advanced processes to take care of things like reaching out to customers that you haven't heard from in a while or notifying you of stalled sales opportunities.

By putting small steps together, Act! can automatically perform many of your routine sales, marketing, and customer service tasks. This helps everyone in your organization to work more productively so you can contact more prospective customers, sell more products or services and support more existing customers—all without needing to hire new employees or acquire resources!

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## Easily Automate Key Tasks

Smart Tasks enable you to automate activities that you do on a regular basis to keep the ball rolling in your sales and marketing efforts. To create a new Smart Task, you will need to define three things: when, who, and what the Smart Task should affect.



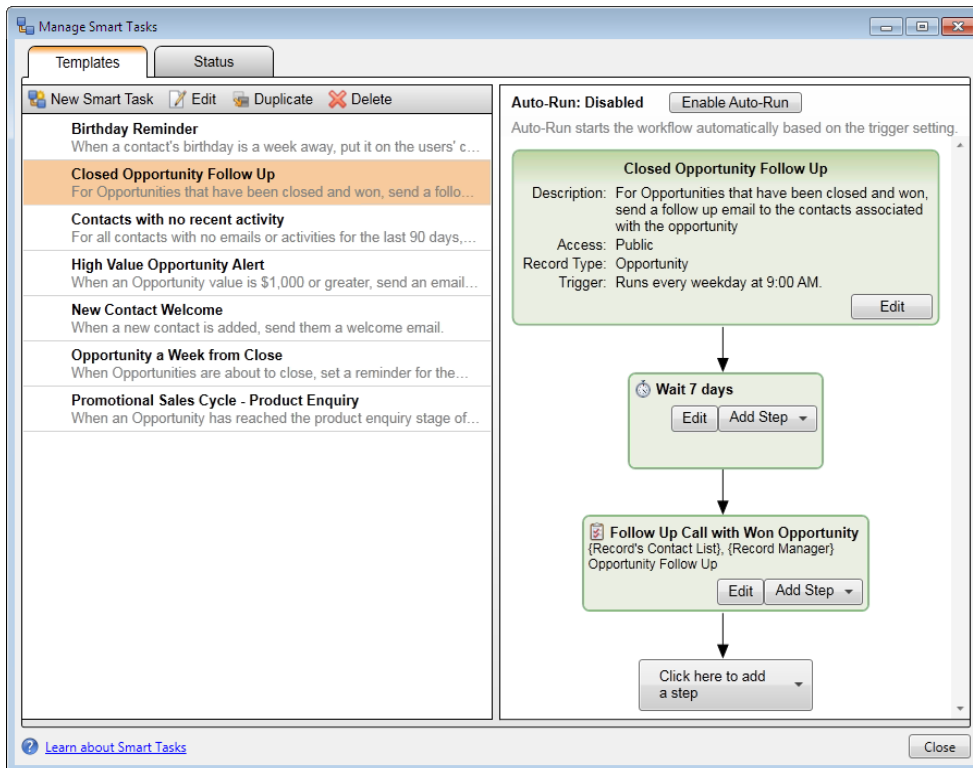
Smart Tasks run when they are triggered. You can either set a trigger to follow a schedule, or trigger the Smart Task manually when you want it to begin. For example, you can schedule a Smart Task to complete the steps in the workflow on a certain day of the week or time of day. You can also have a Smart Task move on to the next step as soon as the previous step is complete. You can even direct a Smart Task to wait a number of days, weeks, or months before performing the next step in your process.

Next, decide who you want to include in the sales, marketing, or customer service task. Smart Tasks run for opportunities or contacts. You can filter based on any criteria available in the opportunity or contact, including product fields and user defined fields.

Smart Tasks can be set up to schedule an activity, or a series of activities, including phone calls, meetings, to-do items and other user defined activities. Smart Tasks can also send a preformatted email.

The more you automate routine sales, marketing, and customer service processes, the smoother your business will operate, leaving you with more time to focus on the big picture.

An easy-to-use visual diagram wizard helps you set up the workflow that Smart Tasks will follow. Smart Tasks functionality is built on proven Windows® Workflow Foundation, so it is easy to use and extremely reliable.



In a few minutes, you can decide when a Smart Task will run, what task it will perform, and which contacts or opportunities it will include. Because Smart Tasks includes an easy to use visual designer<sup>1</sup>, you'll be able to design a new workflow with only a few mouse clicks. Start from scratch, or edit a pre-loaded template included in Act!. If you want to reorder the steps, just drag and drop them on the screen in your preferred order.

As you can see, Smart Tasks provide a very versatile and flexible way to automate many, if not most, of your everyday sales, marketing, and customer service tasks. The more automation you create, the smoother your business will operate, leaving

<sup>1</sup> In Act! Premium (access via web), administrative functions must be performed on the web server.

you with more time to focus on the big picture. In the rest of this document, we'll examine some ways you can use Smart Tasks in your day-to-day business.

## Increase Productivity and Efficiency in Sales

Smart Tasks allow your sales professionals to spend less time making to-do lists or scheduling follow-up activities. By improving their efficiency, your sales team can spend more time working with prospects and customers to earn additional revenue for your business.

To ensure security, only administrators and managers can create new Smart Tasks or edit existing templates. But setting up a new Smart Task is so easy that it doesn't require programming or technical expertise. In fact, sales managers can easily create Smart Tasks for the sales team.

Smart Tasks also provide a way to solidify existing sales processes and standardize them so they are applied consistently to all opportunities. Automate your best practices so that everyone works sales leads by the method that is most likely to result in new business. For example, you can set up a Smart Task that will trigger when an opportunity moves to the "needs assessment" stage of the sales cycle and schedules a to-do for the record manager to complete the necessary forms to analyze the customer's needs.

## Time Marketing Campaigns to Maximize Results

In marketing, the right timing is essential. If you wait too long to follow up with an interested prospect, they will lose interest. Likewise, if you try to sell to the right people at the wrong time, you are unlikely to meet with success. Too often, businesses do not make consistent marketing efforts. Instead, they turn marketing on and off like a spigot when the sales team asks for new leads. This approach costs more and is usually less effective than automating marketing processes to improve productivity and use affordable methods such as email.

Smart Tasks help you time your marketing campaigns so that you will get the most return for your marketing dollars. By spacing communications with customers and

Smart Tasks allow your sales professionals to spend less time making to-do lists or scheduling follow-up activities and more time making the sale.

prospects correctly, you will keep them engaged in a dialog with your company and nurture them toward a purchase until it is time to hand the lead off to sales.

## Nurture Prospects Automatically

Create multi-step campaigns to nurture new leads and incorporate these plans into your Smart Tasks sequences.

1. Send a welcome e-mail to new contacts.
2. Invite new customers to subscribe to your electronic newsletter, product announcements, or other programs.
3. When opportunities change to “Closed-Won” status, send an email that offers customers the opportunity to upgrade their selection, or purchase related products or services.
4. Schedule opportunities in the “Inactive” status to receive periodic customer success stories and/or savings offers.
5. If an opportunity moves to “Closed-Lost” status, wait a while and then try a special campaign to reengage the contact, or survey lost sales to find out what your company could have done better.

## Deliver Outstanding Customer Service

Customer service is another great area to automate everyday tasks with Act!. By setting up Smart Tasks, you can deliver those extra little touches that remind customers why they like dealing with your company. The extra attention that you are able to pay to the customer experience is well worth the effort—it is much easier (and more profitable) to sell more products or services to an existing customer, than to replace that customer.

#### 4 ideas for excellent customer service with Smart Tasks

1. Schedule a follow-up call from an account manager after an opportunity moves to “Closed-Won” status.
2. Send an email to new customers explaining how to contact your company, where to find additional information about products or services, and how to sign up for any available training.
3. Send a birthday email greeting to customers, or schedule a call from their account representative.
4. Celebrate customer loyalty by sending a thank you email or letter on the anniversary of each customer’s first purchase.

## Conclusion

With a good set of well-designed Smart Tasks, you won’t need to worry about a high value sales opportunity slipping through the cracks, or forgetting to follow up with your best customers. Smart Tasks help business owners and salespeople work more efficiently and stay on top of important follow up activities. Using Smart Tasks, you can implement multistage—yet affordable—marketing campaigns, and time the sequence of communications to achieve the best results. Finally, Smart Tasks keep up with day-to-day activities that remind customers why they like to do business with your company. Drive higher customer satisfaction when you automate sales and service tasks.

Act! is designed to help busy professionals save time and money by improving productivity throughout your organization. Automate key activities so that you can get more accomplished every day and expand your business with a rich source of new, highly qualified leads. With Act!, you can quickly build an automated selling machine inside your business!





#### **About Swiftpage**

Swiftpage is committed to empowering individuals, small business and mobile sales teams to better manage their business interactions, more intelligently engage their customers, and convert more interactions into transactions. The company's growing network of partners, customers, end-users and employees collectively represent the Swiftpage Nation, united across the globe as one team, on one journey. Learn more at [www.swiftpage.com](http://www.swiftpage.com) and join the conversation at [social.swiftpage.com](http://social.swiftpage.com).

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