

Employment specialists put Act! to work

The logo for Act! is a bright orange circle containing the word "act!" in a white, lowercase, sans-serif font. A small trademark symbol (TM) is positioned at the top right of the exclamation point.

When a team of not-for-profit employment mentors needed to securely and more effectively manage a wealth of data – including highly sensitive client information – it was Act! they trusted to improve both productivity and preserve client confidentiality.



Morningside 

The logo for Morningside features the word "Morningside" in a black, elegant cursive script. Below the text is a thin horizontal line that ends in a small red square containing a white stylized letter 'M'.

“Act! gives us the information we need quickly and accurately, which means we can focus more time and effort on supporting clients. And over the eight years we’ve been using it, the software’s continually developed, so we know that in the future it will keep pace with our needs as we grow and evolve.”

Jim Larson
CEO Morningside

For over 50 years, specialist employment service, Morningside, has helped those with disabilities back into work using detailed personal information to help match them to their ideal job.

However, using a paper-based system to do this, limited access to client notes and business contact information, which meant those in the field were continually having

to return to one of Morningside’s four offices to get the information they needed. Unsurprisingly, that was a major drain on time and effort that would be better spent working with clients.

Based in Washington State, USA, Morningside is state-funded, which makes maintaining accurate and detailed records essential for ensuring this not-for-profit organization is able to bill accurately for the work that it does.

For Morningside’s CEO Jim Larson, this caused big problems in the past.

“Every client has their own unique requirements for tracking and billing. That used to mean going through pages and pages of case notes and timesheets to work out billable time for everyone we’re helping. So invoicing could take a manager a week out of every month – and with so much data to process, there were bound to be mistakes.”

So, when two of his own job development specialists suggested Act! as **a software package that would greatly improve the situation**, Morningside contacted their local Act! Certified Consultant to arrange an exploratory meeting so Jim and his team could see Act! in action.

It was then that they realized Act! would solve all their problems with data error and limited information access – **all in one easy-to-use package**.

Customizable, confidential and current

Since Morningside holds sensitive client details such as medical histories, it was absolutely critical that any CRM software had to work without compromising client confidentiality. Thanks to Act!’s ability to create menus and tabs for specialist information, sensitive data could be included, with access limited to those who needed to know.

Previously, with their old paper-based system, the team had struggled to respond to specific information requests from agencies and stakeholders. Now, the Act! reporting system allows them to answer any inquiry they receive – however specific – by custom creating a pull-down menu for the exact data required.

But the benefits of Act! weren’t just limited to having much greater control over information. There were also **productivity improvements** – remarkably, monthly invoicing, which used to take a week to complete, now takes less than an hour!

What’s more, field staff can use Act! to record time spent supporting each client, allowing Act! to quickly and easily populate invoices with up-to-the-minute information, making inaccurate billing a thing of the past.

Supporting clients and staff

Before adopting Act!, finding out about a client, or business they might work for, involved searching through crowded filing cabinets for information before a team member could start developing up an employment opportunity – a slow process which often led to potential vacancies being filled by other candidates.

Now, after identifying available jobs and agreeing a support plan, the Morningside team can input the information into their Act! database and start working their contacts and matching people to possible jobs as soon as they have met a new client.



And because Act! is so easy to adapt, working around changes to client funding is straightforward.


“When state law changed and fixed the maximum number of hours we can provide for each client, it could have caused a lot of problems,” recalls Jim. “But because we had Act!, we simply created a front page for every client record to show how many hours of support they’d already received, so we were confident of never going above the threshold.”

Simple set-up with instant results

While managers had been prepared for some disruption when switching to Act! from the paper-based system, thanks to the simple interface (but still comprehensive configuration) designed by their local Act! Certified Consultant, **the whole team got up to speed fast** with their new way of working. And it’s the same when it comes to teaching new staff how to use the software, as Jim Larson explains:

“Act! is so user-friendly that after just an hour of basic training we can have new team members working out in the field with an experienced co-worker. We offer further training if an employee is using a particular menu or tab for the first time, but Act! pretty much explains itself.”

Morningside now has a centralized information database they can rely on, which has meant they are **supporting over 700 people with disabilities into work every year** – proving that Act! is just the job even when it comes to the toughest of employment challenges.



Results

Time saved on invoicing – **one week per month** for each program manager.

Morningside is now able to support over **700 clients return to work each year** because it can quickly access **up-to-the-minute information** about their needs and those of potential employers.

68 field staff and managers have access to a centralized database of client and business information, fast-tracking client assessments and employment opportunities and **reducing response time** should issues arise.

About Act!

Act! is the #1 best-selling Contact & Customer Manager, trusted by individuals, small businesses, and sales teams to get organized and take the guesswork out of marketing to drive sales results.

