

ACT! Scorecard—How Well Are You Using your Database?

A scorecard is used to measure your effectiveness in specific areas. You will identify areas of strength and those that could use improvement. Using the ACT! Scorecard, rate how well you are using ACT! to save time, keep organized, build and maintain relationships. Calculate your Overall ACT! Score by adding up the values for all statements and indicate your score in the bottom row provided. Review the statements that have the lowest scores and consider how you can enhance your ACT! skills.

	Performance Score On a scale of 1 – 4, with 1 being lowest and 4 the highest, rate how well you are using ACT!			
	1	2	3	4
How well do you use ACT!?				
ACT! can tell you when the <i>first and last</i> time you spoke to a client. Do you know how?				
Can you import and export information out of your ACT! database?				
Are you able to share and coordinate calendars with other users and set appointments?				
Are you using Reports to analyze contacts' past histories and upcoming activities?				
Are you able to gain insight into your business through the data that you have contained?				
Are you using customized fields to track information pertinent to your specific company/industry?				
Are your contacts segmented into different groups and receive targeted mailings?				
Can you forecast your sales for the next month? Six Months?				
Do you have instant access to a particular client's: Sent/received emails, notes, history, upcoming calls, upcoming meetings and upcoming to-dos, documents (quotes, proposals, etc)				
Are you able to write/email letters, contracts, proposals, forms, brochures from your database?				
Are you able to define a series of activities around a particular event and then schedule that series to automatically put activities on a calendar?				
Are you and your sales people motivated to consistently use the company database?				
Overall ACT! Score:				
<p>WHAT YOUR RATING MEANS:</p> <p>43 - 48 points: You're doing great. Share your skills with others.</p> <p>42 – 36 points: You're using some of the skills, but could a bit more.</p> <p>35 – 26 points: You're not using ACT!'s basic capabilities. Try some training!</p> <p>25 or less points: You need training! The average person uses ACT! better after 2 hours of training</p>				