

The logo for Act! CRM, featuring the word "act!" in white lowercase letters with a trademark symbol, set against a bright orange circular background.

act!™

# Act! CRM makes a sound investment for finance firm

For a financial services firm, instilling confidence in what they do often depends on delivering effective and timely messages. So, when SynVest wanted to improve their marketing to clients, they chose Act! CRM because it offered the perfect balance between cost and functionality.

The logo for SynVest, consisting of a dark blue rounded rectangle with the word "SYNVEST" in white uppercase letters, and a lighter blue rounded rectangle below it with the words "Asset Management" in white.

SYNVEST

Asset  
Management

“Act! CRM has given us everything we needed, and more. It’s helped us make a giant leap forward in making our offline marketing and communication much more efficient.”

**Annemiek van Nieuwenhuizen**  
SynVest marketer

---

Since it was set up in 2005, Amsterdam-based SynVest Fund Management has grown to become a serious player in the Dutch investment market. It now oversees about €450 million of assets in property, managed and index-linked funds, each with its own distinctive risk-return profile.

---

As with any firm in the financial services sector, one of the biggest challenges for SynVest is not just providing their clients with good returns, but also maintaining their trust. That’s very dependent on good communication, which is where Act! comes in.

“Investing is a risk,” says Annemiek van Nieuwenhuizen, a marketer at SynVest, “so, it’s up to us to make sure our clients have confidence in us and know they can safely make an investment with us to top up their pension or generate an annuity.”

## More efficient communication

SynVest regularly communicates with existing and would-be clients, providing information updates and suggesting new investment opportunities they might be interested in, something they can only do effectively when they better understand their clients' interests and needs.

Because many of them prefer to receive a physical brochure or magazine through the post, the firm needed a way to manage its offline marketing and communication. However, because the system they were using wasn't a dedicated CRM software, doing this was a time-consuming and inefficient process. "It took so many different actions each time and a lot of thinking to get our brochures and magazines to the right people," says Annemiek.

## Perfect balance of price and functionality

It was an obvious time to move to a proper CRM system. After carefully reviewing and considering a range of potential products, SynVest decided that Act! CRM was the right choice for their business because it offered a great balance between price and functionality, "which ultimately is why we chose it over other systems," says Annemiek.

It's a decision they haven't regretted.

"Act! CRM has given us everything we needed, and more." says Annemiek, "It's helped us make a giant leap forward in making our offline marketing and communication much more efficient."

“ Act! CRM has given us everything we needed and more. It's helped us make a giant leap forward in making our offline marketing and communication much more efficient.”

**Annemiek van Nieuwenhuizen,**  
SynVest marketer



## Act! CRM – intuitive to use

“I noticed how user-friendly Act! CRM was right from the start,” says Annemiek, “which makes it a great system to work with. Not only is it highly intuitive to use, but it lets us really filter information so we can produce highly targeted communications.

“With Act! CRM it’s so simple to send a physical magazine, newsletter or brochure to specific people depending on their behaviours and interests, in a way that I haven’t come across with other systems. That helps our sales department to make contact at the right time with right message.”

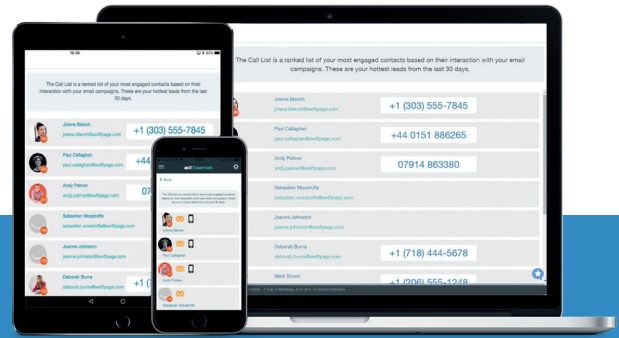
While offline communication is important to SynVest, digital marketing is incredibly important too. So, to help them automate this aspect of the business, last year the firm began using an email marketing solution.

## Synchronises with other systems

Because information needs to be shared between the two systems, “it’s really important the two systems can synchronise and work together seamlessly,” says Annemiek.

Making sure they retain the chemistry between them is down to the Act! Certified Consultants (ACC) who set up Act! CRM for them and then integrated it with the new email marketing system.

“They helped us tremendously and became really involved,” says Annemiek. “So, even though the email marketing program wasn’t one they knew intimately or used themselves, they took the time to find out what it could do so they could achieve a flawless integration with Act!. We were delighted with that, because it really took a weight off our shoulders.”



## Results

- By enabling SynVest to better organise its database of contacts, Act! CRM has significantly improved the way the firm manages offline communications.
- Many clients prefer to receive physical brochures, newsletters and magazines, which SynVest can now distribute much more easily and efficiently thanks to Act! CRM.
- With Act! CRM in place, the time and effort involved in managing the marketing and communication process has been reduced substantially.
- Because it is highly intuitive to use, life has become much easier for marketers like Annemiek.

**act!**<sup>TM</sup>