



act!™

Act! proves a precision instrument for outreach work

After a successful career in sales and marketing, Phil Van Guilder is now using Act! to create a high-quality database that's become a 'go to' resource for mental healthcare professionals in America.



“ When I send something out I want it to be personal and specific to them, so I'm not just spamming.”

Phil Van Guilder
Casa Palmera

When it comes to Act!, Phil Van Guilder is the first to admit that he's more than a little particular.

“There is something a little OCD about me when it comes to Act!,” says Phil, “as I've always wanted to make sure that everything going into the database is absolutely perfect.”

This 'no rubbish in, no rubbish out' approach goes back to the early nineties when Phil was working in sales and marketing for high-tech companies. A remote worker responsible for managing his own

time and territory, he was searching for a way to keep his contacts in one place.

“I discovered Act! early and got on well with it right from the start,” says Phil. So much so that over the last quarter of a century, even when forced by his job to use another CRM, Phil has always run Act! in parallel.

A tried and trusted resource

Six years ago, Phil escaped corporate life altogether to take on a much more rewarding role as a clinical advocate for the Casa Palmera health treatment facility that helps those affected by substance abuse, eating disorders, depression and similar issues.

“Now I’m an evangelist for mental health,” says Phil, “raising awareness of the resources and capabilities available.”

So, rather than his database being full of prospects and customers, it now contains the names of 3,200 resources — clinicians, psychologists, psychiatrists and other specialist assets.

Information-rich, it has become an invaluable first port of call for both patients and practitioners looking for the most reliable source of data and information. But, if it is to retain its status as a ‘premium product’, ensuring the quality of the database is everything. “I need to know that when I point people in the direction of a resource, it’s the right one,” says Phil.

Targeted communication

Obviously, given the context, it’s the core contact management functionality that’s especially important to Phil. While features like emarketing had more relevance in his previous sales and marketing roles, others are now essential tools, like a mobile version of Act! that reminds him when to leave for his next appointment, and its ability to integrate with other applications.

Phil is also an enthusiastic admirer of the templates he’s able to create in Act!. “I must have over 100 standard letters by now,” he says.

He uses these to automate his regular communications with those on his database. This could be as simple as a ‘thinking about you’ message every three months or so, “to make sure people know



I'm still around doing what I'm doing," he says. "It's amazing how much response you can get from doing something as simple as that. It's also a way to check email addresses and keep the database clean."

Without the templates, this would probably too time-consuming to do.

With new drugs and therapies coming online, Phil also uses Act! to keep his contacts updated about items of interest in the mental health sector. As these may not always be of universal relevance, Phil uses Act! to target the information to the right individual. "When I send something out I want it to be personal and specific to them, so I'm not just spamming," says Phil.

A continually developing asset

With hundreds of business cards still waiting to be scanned into Act!, Phil is continually adding to his database, keeping it vibrant, detailed and up-to-the-minute.

"I'm in the business of helping people, which I do by providing information," says Phil. It's an invaluable insight into a man who by precisely and rigorously collecting, managing and curating information has turned a database into a high-value product in its own right, one that makes life easier and better for the many who use it.



Results

- There are more than 3,200 contacts in Phil's database of clinicians, psychologists, psychiatrists and other specialist assets in the mental health sector.
- There are over 100 letter templates in Phil's Act!, which he uses to speed up communication with those on his database.
- Phil uses Act! to create a regular and ongoing programme of communication with his contacts.
- By taking meticulous care about the quality of information that goes into it, Phil's has turned his Act! database into a 'premium product.'

Contact

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