

ACT-ON SUCCESS STORY

Plante Moran

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Act-On makes it easy to build templates, repurpose assets, and construct campaigns. Our productivity has skyrocketed.

Alyson Purgiel; Senior CRM Business Analyst

Act-On Accelerates Plante Moran's Marketing

- Lead scoring accelerated sales cycle
- Ease of use and built-in templates dramatically increased productivity
- Native integration with Microsoft Dynamics streamlined workflow and empowered sales

Challenge

Plante Moran is a global accounting powerhouse. They have a staff of 2,200, serve 16 industries, and provide 40 different services, including everything from taxes and audits to wealth management and cybersecurity.

Marketing for an organization of this size and scope is a complex undertaking, and no one understands that better than Alyson Purgiel, Plante Moran's Senior CRM Business Analyst. Alyson is responsible for integrating the company's marketing automation platform with four separate instances of Microsoft Dynamics CRM that contain hundreds of thousands of records. And she supports a team of marketing consultants, business developers, and nearly 200 staff.

"The lead activity history in the previous tool was difficult to understand and not that useful," Alyson said. "And we had issues with the software sending emails without any cause. We'd send an email, and then the email would automatically and randomly re-send it multiple times. We contacted their support team, but they didn't provide any help, or even try to figure out why it was happening."

Company Profile

Company:
Plante Moran

Company Size:
Enterprise

Industry:
Financial Services

About Act-On

Act-On is an integrated marketing automation platform designed to align inbound and outbound marketing campaigns across the customer lifecycle.

Learn More:
act-on.com

Solution

Alyson knew it was time for a change. Her search led her to the Gartner Magic Quadrant for CRM Lead Management, a report on marketing automation vendors. The Act-On reviews she read were very positive and spurred her to investigate the platform further.

"I set up a demo, and we liked what we saw," she said. "It came down to Act-On and Marketo, and when we did a deep dive into Act-On's capabilities, I realized it was the better option for us."

"With Act-On, we can develop multi-channel programs targeted to specific audiences, and use white papers and other gated content to gather leads," Alyson said. "Creating the emails and landing pages is simple — much easier than it was in the old tool. And Act-On's templates ensure we maintain brand consistency across the board."

Act-On and its native integration with Microsoft Dynamics are also benefiting Sales. Qualified leads are routed into Microsoft Dynamics, and Act-On allows Sales to see a lead's activity history from inside the CRM. "Act-On's view into prospect behavior is valuable and easy to understand," Alyson said. "The level of detail available is fantastic, and the insight makes sales more effective."

Act-On has become a vital force in Plante Moran's marketing tech stack. Its ability to integrate with more than 20 third-party applications gives Alyson's team everything from usability enhancements, such as access to Act-On email templates from within Microsoft Outlook, to more sweeping capabilities for social marketing and data visualization.

Perhaps the best part of choosing Act-On was how fast all these benefits became available. "We had Act-On up and running within a week and a half, and their implementation team was fantastic," Alyson said. "We needed some help customizing our forms, and they really listened to our developer and walked us through the solution."

Results

Plante Moran's marriage of Act-On and Microsoft Dynamics has been highly successful, and Alyson gives some of the credit to planning ahead. "You can't just purchase a marketing automation platform and have it magically work with your CRM," Alyson said. "Understanding and anticipating the needs of our technology stack made the decision to choose Act-On much easier because I knew in advance that it would work smoothly with Microsoft Dynamics and our other applications."



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