

# Accounting Firm Templeton & Company Cuts Costs and Saves Time with Act-On

Not long ago the Templeton & Company marketing team found itself juggling six different programs to meet marketing needs. The hodgepodge of systems required hours of manual data entry and didn't integrate with their CRM, Microsoft Dynamics. Worse, none of the systems could deliver a comprehensive picture of results. The Templeton team needed something that could bring it all together. They chose Act-On for its ease of use and quick, robust Dynamics integration.



## Highlights:

**Founded:** 1990

**Size:** 60+ Accountants, 3 Offices

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**JULIE WEIL**  
Marketing Director  
Templeton & Company

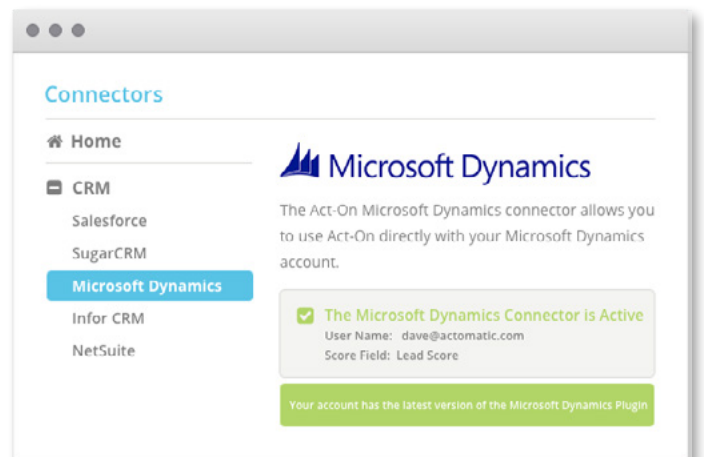
# Challenge

Templeton & Company was founded in 1990 in Royal Palm Beach, Florida. Since then, the accounting firm has moved its headquarters to downtown West Palm Beach, grown to more than 60 accountants, and has expanded to three offices in the state. To meet demand, marketing and sales added systems organically. Unfortunately, the systems weren't integrated—at all. They used Dynamics for their CRM, HubSpot for landing pages and forms, GoToWebinar for webinar announcements and tracking, and ExactTarget for emails. "I had to put all the information collected from HubSpot manually into Dynamics and GoToWebinar. It was a tedious process that involved seven different components," says Templeton Marketing Director Julie Weil. "I was the only thing that was automated and I had had enough."

Prospect activity wasn't being tracked anywhere. "If someone opted out of a marketing list, it wasn't getting into Dynamics," Julie says.

Templeton decided to move to an integrated marketing automation system – one with an open ecosystem to ensure that all other third party applications they were running would integrate. Ease of use and Dynamics integration were key. Templeton & Company began by having conversations with several potential partners.

"We liked the experience with Act-On from the first phone call. It was such an apples-to-oranges comparison (in a good way) to what we had been dealing with, with other vendors," says Sarah Parker, Templeton's Vice President of Marketing. "Act-On laid it out cleanly and neatly for us. Responsive people were there every step of the way to answer questions. In a previous experience with another vendor, the Microsoft Dynamics integration was an additional fee and the process was arduous. Act-On's integration is included in the pricing, and it's simple, seamless, and one-button easy."

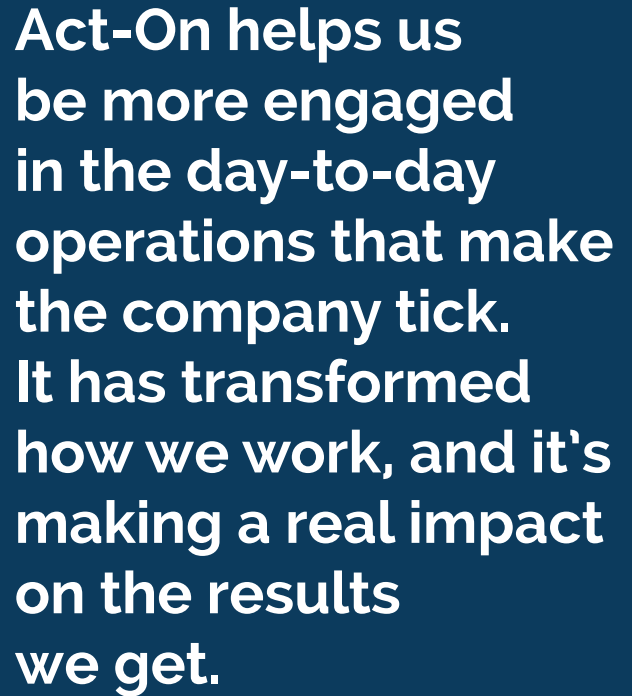


# Solution

The Templeton team had Act-On running with full Dynamics and GoToWebinar integration in about a week. Now all emails are routed through Act-On and tracked through Dynamics, giving marketing and sales a clear picture. "We have one list now, all coordinated through Act-On," Julie says. "When we promote a webinar through Act-On, I select the marketing list I want to use, the messages and the frequency of those messages. I just schedule everything and I don't have to go back in there every day. And everything just goes into our CRM system flawlessly."

Full Dynamics integration has also given the sales team a clear picture of how prospects interact with emails, webinars, and the Templeton websites. "The sales team can easily go into Dynamics and see what a prospect has been looking at, which emails they've opened, everything," Julie says. "That really helps them relate to prospects when they're on sales calls."

The team has begun nurturing leads with automated email campaigns and gated content. For example, prospects can download recorded webinars after answering a few questions through an online form. "We're building this automated pipeline that runs so seamlessly that it really frees up our time," Julie says.



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## Marketing Automation and its Applicability to the Professional Services Industry

Sarah and Julie see marketing automation as an integral part of the shift taking place in professional services. “The industry is starting to recognize the value of creating demand,” Sarah says. “Marketing automation makes it possible for professional service providers to identify customers, anticipate their needs, and offer solutions in a timely and targeted way.”

As a professional services firm, Templeton also frequently recommends marketing automation solutions to its clients. “If they need CRM integration, we tell them about Act-On,” Sarah says. “Act-On has been integrating with [Microsoft] Dynamics CRM longer than some of its competitors and has a seamless look and feel. It’s a no-brainer for us to recommend it.”

## Social Media Publication Made Easy

Sarah and Julie handle marketing for both Templeton & Company and their technology solutions affiliate, Templeton Solutions; they have separate social media accounts for each organization. With a previous automation solution, they could not schedule posts from multiple accounts, so all posting was manual. Sharing a press release for Templeton & Company, for example, would require manual posting on three or four different sites.

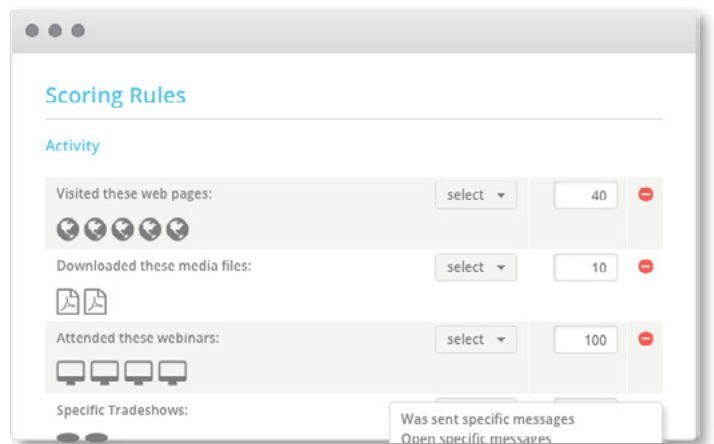
“Now, with Act-On, it’s simple,” Julie says. “We open the social publish feature, put in our content, select which account or accounts we want it to go to, and distribution is done automatically.”

## Marketing as Part of the Pursuit Process

“We use Act-On to follow the response to marketing activities, such as reaction to a press release or how many website visitors we’ve had as a result of various campaigns. Everyone from our managing partner to our sales professionals can go in and see everything we’re doing. Act-On helps us look good,” Julie says.

This visibility extends to individual buyers. For any given prospect, the team and the executives can see which emails have been opened, which content assets have been downloaded, which web pages have been visited, and which forms have been submitted.

“Using Act-On helps us be a part of the pursuit process,” Sarah says. “We can get notification when a hot prospect is on the website or looking at an executive’s CV, for example, and pass that along to the appropriate party. Act-On helps us be more engaged in the day-to-day operations that make the company tick. It has transformed how we work, and it’s making a real impact on the results we get.”



# Results

Julie and the Templeton team have saved a significant amount of time using Act-On. The marketing director estimates she's slashed at least five hours off of webinar prep time alone. "Even if people clicked through things and filled out a form, we had to manually add that data into Dynamics," Julie says. "It's easy now. The entire process is automated. I can go in and track who's registered and follow up with people who attended or didn't attend. This functionality has given me the time to focus on other strategic elements of our program."

Consolidating six platforms into one has also lowered our TCO. "We were able to bring our budget numbers down because Act-On provides so many different sales and marketing capabilities that integrate with our CRM system. There's the integration of GoToWebinar, website analytics, landing pages, forms, and more. There's so much there that we can get from one system; that was really a huge selling factor for us."

Sarah and Julie say Act-On has cut the time spent on marketing in half – which also contributes to the bottom line. "If you add everything up, Act-On is saving us approximately \$10,000 a year," says Sarah.

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## About Act-On Software

Act-On Software is a marketing automation company delivering innovation that empowers marketers to do the best work of their careers. Act-On is the only integrated workspace to address the needs of the customer experience, from brand awareness and demand generation, to retention and loyalty. With Act-On, marketers can drive better business outcomes and see higher customer lifetime value. The Act-On platform provides marketers with power they can actually use, without the need for a dedicated resource.

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