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Patrick Peyton  
Balmar, Inc.



## Balmar Puts Customers First With Help From SystemLink

For 45 years, the Washington D.C. metropolitan area has been served by a service-driven printing company out of Falls Church, VA. With a unique range of complete, scalable, and practical solutions, Balmar, Inc. is committed to providing for the printing needs of businesses. From business cards to personalized letterheads to multi-paged full-color brochures, Balmar has the expertise for any need—and a commitment to the best service that its customers could ask for.

### Customer Care Grows Difficult for Balmar

When customer service is a priority, good customer information is an absolute necessity. Balmar found that staying on top of customer information became exceptionally difficult with the constant turnover of salespeople. As salespeople moved on, the knowledge they had built up of the customers that they dealt with personally would be completely lost every time. They had no way to pass on “the little things you need to know about a customer to ensure they feel taken care of.”

At the same time, all existing customer information was kept in something of a master address list in an antiquated system. Salespeople could not refer to it easily and submitting changes was nearly out of the question. The people of Balmar can recall instances where they shipped products to the wrong address because salespeople who knew of the discrepancy were not able to make the necessary updates.

Ideally, Balmar wanted three distinct data pools: accounting information, ERP information, and Customer information, and they wanted integration and communication between the three because, as Patrick Peyton of Balmar puts it, “we had a lot of duplication of efforts.” The biggest problem with that ideal was that Balmar had accounting and ERP solutions that they were happy with—they just needed a CRM solution. However, it needed to be a stand-alone solution that could integrate fully with their existing systems without requiring a complete change for Balmar.

### SystemLink Provides the Solution With SageCRM

Balmar hit the market with a vengeance, carefully shopping through at least 8 different possible systems to find one that could match their “very specific

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requirements.” They knew they wanted a system that they could host themselves because they had the technical sophistication and structure for it. They also had specific requirements for customer and financial reports they would need and wanted those reports as part of the core system they would purchase.

After slowly and carefully narrowing down their options, they chose SageCRM because they recognized it as a highly customizable, robust CRM that did not need to be bundled together with its own ERP solution. Also, they recognized that SystemLink, the solution provider Sage connected them with, was highly experienced in integrating solutions and had the technical knowledge to integrate this system into their current system. Patrick recalls, “SystemLink was devoted to helping us find a solution without ever giving us a hard sell and trying to force a product on them. They listened to our needs and did exactly what we wanted them to.”

### **SystemLink Helps Balmar’s Service to Reach Higher Levels**

One of the biggest things that Balmar had hoped to achieve with a CRM solution was a better learning curve for salespeople. Before they upgraded to SageCRM, they would spend considerable time and resources training new people. “Now, our salespeople have a tool that helps them up to speed quickly and makes them more effective with customer interaction,” states Patrick. “And the best part is that we have saved a lot of money that would have been used developing salespeople.”

Now Balmar experiences much greater fluidity. Accounts can be moved between salespeople easily to achieve better results. For example, Maggie, one of Balmar’s newer salespeople, has picked up a number of accounts because, through SageCRM, she recognized that other salespeople were letting them lie dormant. She was able to recognize that inactivity and jump in with the resources that SageCRM provided. Also, managers are able to see dormant accounts as well and can encourage their current salespeople to renew that business or move the account on to another salesperson.

Above all, SystemLink fit SageCRM seamlessly with their Balmar’s other systems. Balmar has achieved the end-to-end solution they were working for and the communication between the three that allows their business to perform without a hitch. In fact, it allows business to run exactly the way that Balmar advertises—with customer needs and expectations as their first priority.