ACT!
by Sage

CUSTOMER SUCCESS STORY

CUSTOMER
Balmar, Inc.

CORPORATE PROFILE
Headquarters
Falls Church, Virginia

Type of Business
Printing

Number of Employees
~500

APPLICATION
Software
- ACT! Premium for Web

Add-on Products
- OAK!Merge!
- OAK!Check!

Number of ACT! Users
40

Database Information
26,000 records

ACT! Helps Balmar, Inc.
Discover 120 Extra Sales Hours per Week

The salespeople at Balmar, Inc. have been ACT! users since the first Windows version was released in 1992. While it's certainly not unusual for a company to remain loyal to ACT! for so many years, it is interesting to observe one that evolves synchronously with the product itself. When Balmar learned about the release of ACT! Premium for Web, it seized the opportunity to use it, envisioning a way to improve its business by improving how its workforce uses ACT!.

Founded in 1966 and headquartered in Falls Church, Virginia, Balmar is the Washington D.C. region's leading provider of comprehensive print communications solutions. Blending technology, craftsmanship, and innovation, Balmar offers a unique advantage to its customer base of associations, corporations, law firms, government agencies, colleges and universities, and government contractors.

Realizing the Need for Greater Flexibility

For years, Balmar employees used ACT! in its most simplistic form: to manage individual contact records. The company had about 30 salespeople maintaining separate account databases, in addition to a small group of corporate management and collections staff using individual installations for basic contact management.

Balmar wanted to consolidate its databases for three key reasons. First, its salespeople wanted to access ACT! data from anywhere, whether on the road, at a client's office, or at home. They could save significant time and effort, if they could log into ACT! without having to go to the office.

Secondly, because of the separate databases, Balmar faced challenges keeping customer lists up to date and maintaining data consistency.

CHALLENGE
Balmar Inc. wanted to centralize more than 30 separate ACT! databases and enable anytime, anywhere access, automating data merges, imports and cleansing as well as automatically assigning accounts to avoid ownership disputes among sales reps.

SOLUTION
Implementing ACT! Premium for Web with add-on products OAK!Merge! and OAK!Check! from Oakhurst Systems, Balmar Inc. was able to accomplish their information access goals.

RESULTS
ACT! Premium for Web streamlined efficiencies, opening four hours of new sales time per week for 30 sales reps — a total of 120 extra sales hour every week.

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> *"Each rep has added approximately two more new business appointments per week. We've closed some accounts that we previously didn't have time to focus on and they turned out to be great accounts,"*
>
> —Patrick Peyton
> Technical Director,
> Balmar Printing

ABOUT SAGE SOFTWARE (formerly Best Software)

Sage Software offers leading business management software and services that support the needs, challenges and dreams of more than 2.4 million small and mid-sized business customers in North America. Its parent company, The Sage Group plc (London: SGE.L), supports 4.5 million customers worldwide. For more than 25 years, Sage Software has delivered easy-to-use, scalable and customizable software for accounting, customer relationship management, human resources, time tracking and the specialized needs of accounting practices and the construction, distribution, manufacturing, nonprofit and real estate industries. For more information, please visit the Web site at www.sagesoftware.com/moreinfo or call (866) 308-2378.

The company wanted an automated way to merge, import, and clean data, so that users would not spend time doing it themselves.

Lastly, Balmar needed to resolve issues with salespeople stepping on each other's toes by calling accounts already in cycle with another representative. Without centralized control, they didn't have a good system for managing lead assignments. "We'd play musical customers all the time," joked Patrick Peyton, technical director at Balmar. "Sales managers especially wanted a way to avoid disputes over who owned an account," he added.

Enabling New Efficiencies with ACT! Premium for Web

In search of a more flexible way to continue using ACT!, Balmar turned to its ACT! Certified Consultant, Oakhurst Systems, for a solution. When Oakhurst informed Balmar that ACT! Premium for Web was soon to be available, Balmar jumped on the opportunity to Beta test the product.

Balmar and Oakhurst worked together on customizations, creating fields for Balmar's customer numbering and lead numbering systems. "We set up automatic lead assignment based on territory, so that salespeople can only see their own prospects," said Peyton. The ACT! customizations provide appropriate control over client and prospect records.

Balmar also installed two add-on products, OAK!Merge! and OAK!Check! from Oakhurst Systems. OAK!Merge! automates Balmar's import routine and prevents the creation of duplicate records. OAK!Check! frees employees from cleaning data by automatically standardizing entries such as phone numbers, addresses, company names, abbreviations, etc.

Increasing Sales by Providing Web Access

Balmar estimates that ACT! Premium for Web has created four hours of new sales time per week for each of its 30 reps – a total of 120 extra sales hours every week. Now, instead of spending time in the office gathering info and updating isolated databases, Balmar's sales staff is out meeting with customers. They access data via a Web browser, which enables them to get what they need at home and then go directly into the field – without visiting the office first.

"The biggest benefit is getting sales people in front of customers better prepared and earlier in the day. In our industry, there's a better chance of making a sale during the morning hours," explained Peyton. Now, sales reps can arrive at an 8:00 A.M. appointment totally prepared. Before, they weren't arriving at their first appointments until around 10:00 A.M.

"Each rep has added approximately two more new business appointments per week. We've closed some accounts that we previously didn't have time to focus on and they turned out to be great accounts," Peyton said.

Balmar originally used ACT! for basic contact management, but now relies on the solution for much more. ACT! Premium for Web is a strategic advantage that Balmar holds over its competition.

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