CLIENT CASE STUDY · CUSTOM CRM PLATFORM

One System, In Sync

How a PEO brokerage replaced bloated, off-the-shelf CRMs with software built exactly for the way they do business.

CLIENT	CarolinaPEO · Charlotte, NC
INDUSTRY	PEO brokerage and HR services
SOLUTION	Custom client and sales pipeline platform
DELIVERED	Briar Creek Tech, on Google Cloud, desktop and mobile

Real time
Every change, on every screen, instantly

One
Source of truth for the entire team

Zero
Installs, downloads or add-on subscriptions

100%
Client-owned code and cloud infrastructure

The starting point

CarolinaPEO knew they needed a CRM. That part was obvious. So they did what most businesses do: they tried the well-known, out-of-the-box systems.

Each one came loaded with features they would never use, while the things they actually needed were buried, awkward, or missing. When they tried to close the gaps, the add-ons started piling up. More modules, more subscriptions, more complexity, and the system still did not match how a PEO brokerage actually works.

Meanwhile, the real business still lived in massive spreadsheets: master lists of PEOs, carriers, clients, and contacts. Years of hard-won knowledge, scattered across files that could not talk to each other.

> **They did not need more software.** They needed the right software.

What we built

Briar Creek Tech built CarolinaPEO's platform from the ground up around their actual process: their pipeline stages, their PEO and client relationships, their referral network, the way they really work a deal. Nothing extra to pay for or work around. Nothing missing. No add-ons stacking up.

The moment it clicked

During a live working session, their team lead moved a client from one stage of the pipeline board to the next, and it moved on every screen in the company at the same instant. No refreshing, no re-sending files, no wondering which version is right. One team, one source of truth, updating in real time.

In sync wherever they are

The platform looks great on a desktop at the office and just as good on a phone on the go. Same system, same live data, no installs and nothing to download. Whether someone is at their desk or in the field, they are working in the same place, and every update lands everywhere at once.

From scattered spreadsheets to a single source of truth

We brought their sprawling master datasheets into the cloud: their entire network of PEO and client relationships, together with their book of clients and contacts, all structured, connected, and searchable. Every carrier tied to the right PEO, every relationship mapped, nothing lost in the move. Institutional knowledge that once lived in files on individual computers is now a system the whole team shares.

Trusted platforms, fully owned

The team signs in with the Google accounts they already use every day, and the platform runs on Google Cloud. Just as important, CarolinaPEO owns it. The code and the cloud environment are theirs, with full access and control. We built it; they hold the keys.

Where it stands

- **One place to run the day.** Pipeline, clients, partners, tasks and follow-ups all live in the same platform.
- **Deal flow visible at a glance.** Any update is instantly reflected for everyone, on any device.
- **Institutional knowledge, organized.** Every PEO, every carrier, every relationship: connected and searchable instead of trapped in spreadsheets.
- **No feature bloat, no add-on creep.** The platform does exactly what the business needs, because it was built for it.

> *"We tried the big-name CRMs, and none of them fit the way we actually work. Carl built us exactly what we needed: nothing we don't use, everything we do. The whole team is on the same page in real time, in the office or on the road. And at the end of the day, it's ours."*
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> **Jef Fullagar**, President, CarolinaPEO

> *"Every business has a process that makes it special. When your software is built around that process instead of forcing you into someone else's, your whole team moves faster. That's the future we're building for our clients."*
>
> **Carl Zimmerman**, Founder, Briar Creek Tech

Ready for software built around how you actually work?

Briar Creek Tech builds custom software for businesses that have outgrown spreadsheets and off-the-shelf tools: modern platforms designed around your exact process, in sync across your desktop and your phone, built on trusted platforms like Google, and delivered with full ownership in your hands.

carl@briarcreektech.com · **704.641.5514** · **briarcreektech.com**