



**ABOUT LEDGEVIEW PARTNERS**

***Our clients' success is our success***

Ledgeview Partners is a Customer Management Specialist in Energy Distribution. Ledgeview Partners works closely with your business to implement breakthrough performance improvements that drive extraordinary value in your customer relationships. We provide your company with a holistic, end-to-end approach to customer relationship management through our sales and customer care professionals, and our expertise in Microsoft Dynamics® CRM.

**ABOUT MICROSOFT DYNAMICS® CRM**

***CRM equips business professionals with real time customer information***

Combine familiar Microsoft® Office applications with powerful CRM software to improve marketing effectiveness, boost sales, and enrich customer service interactions. Microsoft Dynamics® CRM equips business professionals with access to customer information through a familiar Microsoft Outlook® experience which helps ensure rapid user adoption and fast results.

**FREE TRIAL**

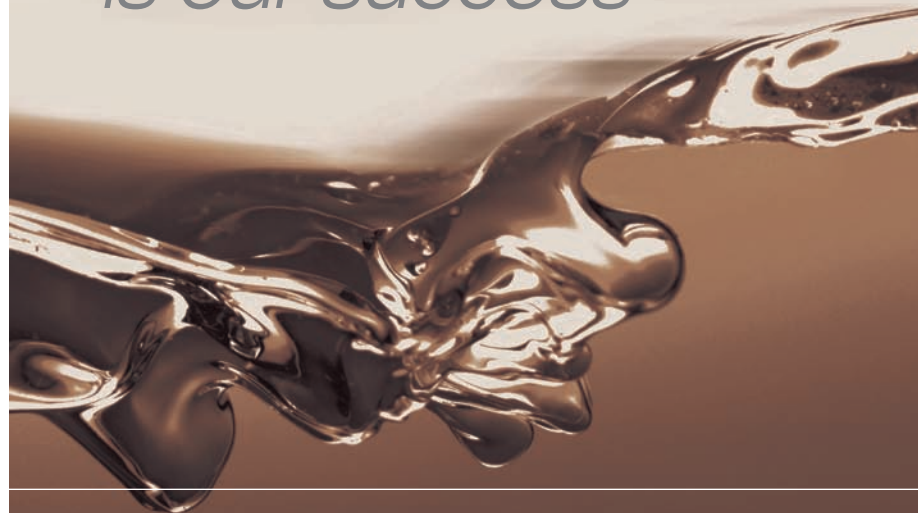
***Call us at (920)560-5571 to set up a 30-day trial and see if our Energy Distribution solution is right for you.***

**INTERESTED IN LEARNING MORE?**

***Visit us at [www.ledgeviewpartners.com](http://www.ledgeviewpartners.com)***



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*Microsoft Dynamics® CRM 2011 helped change the culture of the Sandri Companies.*

*Tim VanEpps, President, A. R. Sandri, Inc.*





**OVERVIEW**

Company:  
A. R. Sandri, Inc.

Vertical Industry:  
Energy Distribution

Number of Users: 40

Company size:  
250 employees



**SITUATION**

**An opportunity to standardize**

For over 80 years, A. R. Sandri, Inc., a family-owned full service energy company, has served the needs of the Northeastern United States and beyond, with multiple businesses including retail gasoline, home heating oil, lubricant distribution, and commercial diesel delivery, as well as photovoltaic and wood pellet heating systems and fuels.

Recently, Sandri decided to modernize its sales processes with the help of a customer relationship management (CRM) system. For years, salespeople had tracked their work manually using 3"x5" index cards or on notebook pages. Steve Ebbrecht, Director of Sales at Sandri, says, "There was no accountability, no way to monitor sales performance."

**Everybody here grew up with Microsoft products, and the familiarity of the Outlook interface makes it easy for my sales representatives to use.**

Steve Ebbrecht, Director of Sales

When Sandri began to evaluate customer management practices, they quickly discovered a great opportunity to standardize their sales approach. Ebbrecht explains, "What we found was that business units didn't talk to one another; every business was built in a silo. So we decided to knock down those silos. We needed one place to serve as our DNA." Sandri looked to Microsoft Dynamics® CRM 2011 business software to provide that single location.

**SOLUTION**

**Ledgeview was willing to collaborate with us to refine the solution**

Sandri worked with Ledgeview Partners, a Microsoft Dynamics Gold Certified CRM partner specializing in CRM 2011 solutions for the energy distribution industry. "Ledgeview was willing to collaborate with us to refine the solution to fit our needs," says Ebbrecht.

With Microsoft Dynamics® CRM, Sandri has been able to implement a standardized sales process across its businesses and provide more uniform sales and service.

"People are recording their business efforts; they can see the pipeline and forecast; they're more accountable and they're paying attention."

Sandri has also used the guided processes capability in Microsoft Dynamics® CRM 2011 to implement an inside sales program, something they had not been able to do before.

**CRM allows us to visualize how we are doing.**

Mike Behn, Chief Operating Officer

**BENEFITS**

**CRM distributes leads and opportunities across all our businesses**

For the first time, Microsoft Dynamics® CRM 2011 is giving Sandri a single view of business across their departments. Ebbrecht states, "CRM will allow the customer service department to distribute leads and opportunities across all our businesses without having to make an additional phone call or send an additional email."

Their CRM solution has also enabled their mobile sales force to be more productive. "One of the real benefits is that sales reps don't have to be connected to the Internet. They can work with a laptop and then upload it when an Internet connection is available."

But the real benefit has been from the management side. "The ultimate benefit we're getting is to be able to look at dashboards that cover the whole gamut of our company—all the departments divisions and so on. That's something Microsoft Dynamics CRM gives us."