

# Ledgeview Partners Customer Solution Case Study



## About U.S. Oil Co.

U.S. Oil Co., Inc. is an independent, family-owned business headquartered in Combined Locks, Wisconsin, doing business throughout the Midwest as U.S. Oil, Inc. and through their seven divisions: Petroleum Operations, U.S. Auto Force, U.S. Lubricants, Express Convenience Stores, U.S. Petroleum Equipment, Design Air, and Custom Manufacturing. U.S. Oil, Inc. was founded over 50 years ago and is now an enterprise of over 1000 associates across the Midwest. They are recognized as innovative leaders in the distribution of petroleum and renewable energy products, lubricants, tires and parts for the automotive care market and air handling systems.

## SUMMARY

The possibilities Microsoft Dynamics CRM creates for U.S. Oil Co., Inc., are endless. They now have more time to devote to their sites and clients; which is making their thriving business even more sustainable. Ledgeview Partners has proven to be a great support system for U.S. Oil Co., Inc. ensuring their needs are met and their business just keeps on growing.



## SITUATION

The Petroleum Operations division is a substantial area of business for U.S. Oil Co., Inc. with 34% of all oil throughputs going through their 13 terminals. They are the largest bio-fuel distributor in Wisconsin and have 137 million gallons of storage. Communications for this sector of the business is crucial as a few years back, they had over 200 contracts in place with gas stations across WI, IL, and MN including sites like BP, MOBIL, and Conoco. It is U.S. Oil Co., Inc.'s job to make sure these stations follow guidelines for each brand (and each brand has different standards). They also need to communicate updates quickly and efficiently to ensure all gas station sites are compliant with the different regulations put in place.

The compliance process was getting overwhelming and finally unmanageable for U.S. Oil Co., Inc. and Sherry Bevers, one of their two customer service managers. Their tracking process at the time for these 200 sites was summed up in a Microsoft Excel spreadsheet. Sherry would go on site visits and have to make notes in her car for at least an hour afterward. Then, she had to usually work into the night to manually input the data into their master Excel spreadsheet on their corporate database. The spreadsheet was overwritten many times between her and her assistant. They were losing data and nothing was ever really up to date. Sherry also felt unsure about her visits, not knowing whether she had the correct regulations for the proper gas station brand. U.S. Oil Co., Inc. was unable to keep up with their growing business and they needed a better tracking system that could enhance their communications and professionalism.

## SOLUTION

Sherry shared her concerns with her manager that their system was no longer working. They were managing 200 sites and still growing. At this point, Sherry was working around the clock to keep up with communications. After extensive online research, Microsoft Dynamics CRM came up as the best choice for U.S. Oil Co., Inc. as the leading Customer Relationship Management tool. They soon began researching partners to help install and implement Microsoft Dynamics CRM and one that was focused and experienced in the petroleum industry. U.S. Oil Co., Inc. interviewed a handful of partners, all of whom demonstrated the capabilities of Microsoft Dynamics CRM.

"I get a lot of "atta boys" and am always glad to take them, but I wouldn't have been able to do it without CRM."

*Sherry Bevers, Customer Service Manager of U.S. Oil Co., Inc.*

A few months into their search, Ledgeview Partners arrived and instead of showing what CRM did, they asked "What do YOU need CRM to do for you and your business?" Although U.S. Oil Co., Inc. was caught off guard by the question, they knew instantly that Ledgeview Partners was the best choice for them. It was obvious to U.S. Oil Co., Inc. that Ledgeview Partners had experience in the petroleum distribution industry because they knew so much about their business from day one. Ledgeview Partners listened and actually understood what U.S. Oil Co., Inc. needed and as promised, made Microsoft Dynamics CRM do exactly what U.S. Oil Co., Inc. needed it to do. It was a great start to a long-term partnership.

Ledgeview Partners had the expertise to provide a petroleum distribution industry solution that U.S. Oil Co., Inc. could really count on. Microsoft Dynamics CRM allowed for a more streamlined and accurate process for their site communications among other integration benefits. Shelly Zeinert, Brand and Price Coordinator of U.S. Oil Co., Inc., says "Working with Ledgeview Partners has been a very pleasant transition. We are a complicated company and they seemed more than competent to handle our needs."



### Steadily Growing with Confidence

Since U.S. Oil Co., Inc. implemented Microsoft Dynamics CRM, sales have grown from 200 contracts to 359 across WI, IL, and MN. They manage 166 BP, 14 Exxon, 48 Mobil, 32 CITGO, 3 Marathon, 33 Conoco, 39 Shell, and a handful of other supply types. Microsoft Dynamics CRM has made it manageable for U.S. Oil Co., Inc. to grow and stay connected to everyone they do business with. Sherry Bevers, Customer Relationship Manager of U.S. Oil Co., Inc. says "I get a lot of "atta boys" and am always glad to take them, but I wouldn't have been able to do it without CRM".

U.S. Oil Co., Inc. is now growing 30 stores or more at a time instead of just 1 or 2. For example, they started up 32 CITGO stores in just 2 days. Previously, it would have taken weeks to get that many stores online before the implementation of Microsoft Dynamics CRM. U.S. Oil Co., Inc. is also moving to a newer and larger facility in the next few months. This is an exciting time of growth for the company as they no longer feel the added stress that more clients can so often create.

### Professional Communications Sustains Business

U.S. Oil Co., Inc. no longer runs the risk of outdated information. With Microsoft Dynamics CRM's mobile capabilities, Sherry Bevers can go offline while on her site visits. After the visit, she can make notes in her car on her laptop, and when she logs back in, it automatically syncs up with any changes that were made while she was offline. Microsoft Dynamics CRM also links with their AS 400 System that holds all information regarding inventory, receivables, gallons, purchasing, invoices, and more. Sherry can work offline and still feel as though she's connected to critical company information. She's no longer second guessing herself, giving her more confidence in her everyday tasks and allowing for more real connections with her clients.

Before she even enters a station for a site visit, she knows the requirements for that brand, past issues with that location, and even the birthdays of her clients' children. Microsoft Dynamics CRM makes it possible for Sherry to be an organized and personable professional. She's no longer scrambling to keep up, instead she is strengthening each relationship she has along the way. Clients appreciate the professionalism and effective communications that U.S. Oil Co., Inc. can now provide, increasing the chance of contract renewal and sustaining business. Sustainability of their business is crucial to their success and with the features of Microsoft Dynamics CRM they can ensure clients are satisfied.

On top of the superior client database Microsoft Dynamics CRM provides, it also gives employees reminders for next steps once sales close. This way, no tasks are forgotten or delayed, making a smooth process for every client. Sherry Bevers says, "I feel like

there is someone watching over us 24/7 and that someone is Microsoft Dynamics CRM". Microsoft Dynamics CRM is enhancing employee confidence, increasing morale, and securing business processes to prepare for even more growth.

"Working with Ledgeview has been a very pleasant transition. We are a complicated company and they seemed more than fit to handle our needs."

*Shelly Zeinert, Brand and Price Coordinator of U.S. Oil Co., Inc.*

### Up-to-Date Communications and Time to Spare

The amount of time Microsoft Dynamics CRM saves Sherry and her team is significant. It has allowed her assistant to work part time after she had her baby and Sherry is no longer working into the night. Sherry noted that it would take at least 4 more of her to manage the workload she does today with Microsoft Dynamics CRM.

For example, Sherry often receives federal updates she needs to communicate to her nearly 400 sites quickly. Usually this would take her all day. First she would create a spreadsheet, print mailing labels and then send out the update. By the time she accomplished all that, the update was most likely outdated. With Microsoft Dynamics CRM, it takes her 7 minutes, a time savings of 473 minutes!

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*Shelly Zeinert, Brand and Price - Coordinator of U.S. Oil Co., Inc.*