

Ledgeview Partners Customer Solution Case Study



About Wausau Supply Company

Wausau Supply Company is a wholesale distributor of building materials operating from eleven distribution locations in Wisconsin, Minnesota, Iowa, Illinois, South Dakota, and Kansas with their main office out of Wausau, WI.

Founded in 1947, Wausau Supply Company is now among the largest privately held companies headquartered in Wisconsin.

www.wausausupply.com

Location: **Wausau, WI**

Employees: **370**

Years in business: **63**

Product Solution: **Microsoft Dynamics® CRM**

SITUATION

A few years ago, Wausau Supply Company was struggling with managing their customer base. They tried customizing an outdated “homemade” system that would track calls, but the information call history wasn’t easily shared with people throughout the company. They were managing customers through email communications, but customer information was not easily tracked and very unreliable. They also struggled with loss of information if an employee left the company. The system was set up so that each person had their own file system, but when that person left, the information went with them. This made it impossible to follow up with current customers and to follow leads through the sales stages.

Because of the struggling economy, building and remodeling projects had dropped dramatically. For this reason, building materials were not in high demand. This greatly affected Wausau Supply Company and they were forced to let a number of people go because of this economic hardship. In order to succeed, Wausau Supply Company needed to scale back expenses by downsizing and become more efficient while doing so. They were pressured to do more with less people, but their current solution was difficult to update, poorly suited for their needs, and didn’t provide the needed customer insight to help them succeed.

“Microsoft Dynamics CRM allows us not to be controlling, but allows us a better chance to be in control.”

*Mike Stelzl, IT Manager
Wausau Supply Company*

SOLUTION

About 2 years ago, Wausau Supply Company started researching customer management solutions. Ledgeview Partners came in and presented a deep dive demonstration into the capabilities of Microsoft Dynamics® CRM. Wausau Supply Company quickly realized how Microsoft Dynamics CRM would ultimately provide them with a system capable of centralizing and controlling their information, freeing them up to do more with less.

Although Wausau Supply Company had a few other solutions in mind during the evaluation phase, such as Salesforce.com, they immediately felt comfortable with Ledgeview Partners. Mike Stelzl, IT Manager of Wausau Supply Company says, “They spoke to us like partners and not salespeople. They actually listened more than they spoke and it made us all feel comfortable.” In addition, Mike mentions that Ledgeview Partners was able to grasp their intentions and needs even better than Wausau Supply Company was able to articulate them.

The contracts were signed, and Ledgeview Partners began by installing two customized modules of Microsoft Dynamics CRM for Wausau Supply Company, both deployed at the same time in February and March of 2009. From the start of the implementation, Ledgeview Partners was clear with Wausau Supply Company on what to expect for cost, timing, and solution capabilities. This new found partnership gave Wausau Supply Company a strategic approach to their ever changing business.



BENEFITS

Streamlined Sales Process

Microsoft Dynamics CRM has helped Wausau Supply Company implement a streamlined Sales Call Process. The solution allows them to group their customer base by territory and region, making it possible to organize in a whole new way. Before they had Microsoft Dynamics CRM, customers were not likely to receive any support, as employees were busy with taking orders and organizing the information coming in. Wausau Supply Company can now dedicate enough time for inbound and outbound sales calls. The outbound sales team can schedule appropriately and track the data seamlessly through their Microsoft Dynamics CRM system, making the company more efficient and allowing them to do more with less people.

Microsoft Dynamics CRM also makes it possible for more people to access sales data across the organization. Information flow is substantially improved because more people (and the right people) can see the information versus just two people with their old system. Through Microsoft Dynamics CRM, information is tied to the customer and not to the employee. So if someone leaves the company, a new employee can easily ramp up and know everything important about that customer. This has lowered training expenses and allowed for better customer relationships.

Craig Oertel, Sales Manager of Wausau Supply Company says, "Microsoft Dynamics CRM has helped us increase sales by being able to easily identify opportunities and track them through the sales cycle more effectively." Having the proper information in front of each sales representative makes it possible to close more deals and increase their overall sales revenue. Their information is more reliable and with this information, comes insight. Sales representatives know the history of each account, which better prepares them to manage their customer relationships into the future.

Company in Control

Microsoft Dynamics CRM is a powerful resource for Wausau Supply Company, giving them more visibility and making it possible to "better plan their work and work their plan".

Wausau Supply Company can now identify problem areas and solve them quicker with more confidence. Mike Stelzl, IT Manager of Wausau Supply Company says "Microsoft Dynamics CRM allows us not to be controlling, but allows us a better chance to be in control." Employees now have accountability and with this new found responsibility, they can deliver results. Microsoft Dynamics CRM allows everyone to see the last time a customer was called, who they talked to, and what was discussed. For example, if Wausau Supply Company receives a call from a customer who hasn't been contacted in a timely manner, they can look up the customer record and find they called them just last week, but talked to Jim instead of Tom. They can now track this new information to ensure communications reach all customer contacts when necessary.

"Information is power and with Microsoft Dynamics CRM, we now know what's going on through better information."

*Craig Oertel, Sales Manager
Wausau Supply Company*

"Can Do" Attitudes Make for a Perfect Partnership

According to Wausau Supply Company, Ledgeview Partners has been helpful, easy to work with, and knowledgeable throughout the training, implementation, and support of Microsoft Dynamics CRM. Mike Stelzl, IT Manager of Wausau Supply Company, notes their "Can Do" attitude as a refreshing change when it comes to technology and the many hiccups they experienced with their old system. They can bring issues to Ledgeview Partners and be sure they will prioritize it no matter how large or small the problem may seem.



Ledgeview Partners' model of implementation was perfect for Wausau Supply Company. Wausau Supply Company started with an out of the box solution until they understood their business needs and how Microsoft Dynamics CRM can meet those needs. This has helped Wausau Supply Company make the most out of their solution to this day and their users are all well trained, limiting user mistakes.

After just two years, Wausau Supply Company trusts Ledgeview Partners enough to manage all Microsoft Dynamics CRM support throughout the company and has no need to intervene. Trust was there from the beginning, and has now reached a new level. Because of Ledgeview Partners' clear communications and honest recommendations, Wausau Supply Company has the confidence to grow their business.

SUMMARY

The support from Ledgeview Partners and the control that Microsoft Dynamics CRM makes possible gives Wausau Supply Company the tools to succeed and come out ahead of the economic downturn. Streamlining of their sales processes and management of their client base creates ample opportunity for the development and growth of their business.

"Ledgeview Partners spoke to us like partners and not salespeople. They actually listened more than they spoke and it made us all feel comfortable."

*Mike Stelzl, IT Manager
Wausau Supply Company*
