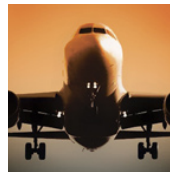


CUSTOMER CASE STUDY

Bolt Express understands the importance of great partnerships and the value of Microsoft Dynamics® CRM to innovate and succeed



BOLT EXPRESS LEARNED THE HARD WAY THAT GREAT SOFTWARE ISN'T ENOUGH. YOU NEED A GREAT PARTNER WHO IS DEDICATED TO YOUR SUCCESS AND WILL GROW WITH YOU AS YOUR BUSINESS EXPANDS.

SITUATION

Bolt Express understood the value of CRM. With a number of different offices and agents trying to work together and communicate in a timely manner, they knew that they needed a powerful CRM solution to accommodate their rapidly growing business. Their previous software package, ACT! by Sage, was not meeting these needs, so in 2008, they made the switch to Microsoft Dynamics® CRM.

Unfortunately, the problems with the new system began almost immediately after installation. The system was slow, unresponsive, and even freezing-up for users during the course of routine tasks. User comments like "not user friendly" or "doesn't work consistently" were starting to plague the IT department and they were in danger of losing employee support in the Marketing and Sales departments.

"CRM was not a nice, happy word around this company in the sales department," says Michelle Dunn, Corporate Sales and Marketing Manager, "People wanted to revert back to the old system. When part of your accountability and responsibility is to make phone calls and keep track of that by documenting them into a system that wasn't working properly, our productivity would go down. It was difficult to hold people accountable for their productivity when the system didn't work correctly. We had problems."

SOLUTION

Bolt Express was convinced that Microsoft Dynamics® CRM was the right solution for their growing business, but was desperate to fix the productivity issues. Off a recommendation from Microsoft, Ledgeview Partners was brought in December of 2010.

Ledgeview Partners came out to meet with Bolt Express and not only took the time to learn about the frustrations and challenges that had created this bad situation but additionally spent time learning about Bolt's business model and their sales and marketing practices. Bolt Express realized after this initial meeting that they had made the correct decision to go with Microsoft Dynamics® CRM, and now with Ledgeview Partners there to support them, they could start to realize the wealth of CRM benefits and increased productivity they were looking for.

[LEDGEVIEW PARTNERS] IS VERY ENGAGED IN THEIR SERVICE. THEY CERTAINLY ENCOMPASS THAT WITH THEIR CONVERSATIONS WITH US AND THEY REALLY DID A DEEP DIVE IN TRYING TO UNDERSTAND WHO WE ARE AND HOW THE SYSTEM CAN HELP US.

Michelle Dunn, Corporate Sales and Marketing Manager, Bolt Express



LEDGEVIEW PARTNERS IS ALL AROUND PHENOMENAL. WE'VE HAD NO ISSUES WITH THE SYSTEM, DURING THE SET-UP, THE DEPLOYMENT, OR AFTERWARDS. WE HAVEN'T EXPERIENCED ANY CONSIDERABLE ISSUES.

Mark Martinez, CRM Administrator, Bolt Express

In fact, the very first meeting with Ledgeview Partners reaped positive results for Bolt Express. With access to the system both onsite and remotely, Ledgeview's CRM Application Consultants, Keven and Chuck, were able to tweak the SQL server, modify the data retention strategies, and create some custom fields to improve performance. Ledgeview Partners created a diagnostics summary for Bolt Express that outlined a multi-month approach to improving their CRM, by incorporating both necessary performance enhancements and a few new customer requests.

For Bolt Express, having the right CRM solution wasn't enough to solve their communication and productivity challenges. They realized the value of having a good partner who provides knowledge, professionalism, and accountability needed for a complete and successful CRM solution.

BENEFITS: INCREASED PRODUCTIVITY

With Microsoft Dynamics®CRM now installed properly, Bolt Express is able to increase the productivity of their agents and representatives. Ledgeview Partners CRM Application Consultant, Keven Sprehe was able to fix the performance issues and a few other pain points without spending a large amount of time or resources. With these problems solved, Bolt Ex-

press was able to get back to work and not waste any more time worrying about the stability of the system.

REVENUE INCREASES

Bolt Express is now ready and able to take advantage of Microsoft Dynamics®CRM as they originally expected to be able to do. They now can utilize the great capabilities to increase sales productivity and provide management with data analytics to hold its sales team accountable for its performance.

With reliable activity reports, management is able to accurately track agent tasks, activities and workflow, where previously they could never get a true number. This confidence has led to better and more timely management decisions and strategies to capitalize on market changes.

EMPLOYEE SATISFACTION

Don't underestimate the value of happy employees! Bolt Express learned that without employee buy-in, not much work will get done, and definitely not in a timely manner. With the help of Ledgeview Partners, Microsoft Dynamics®CRM is now running efficiently and customized for the way Bolt Express does business. Now that the employees have adopted the system wholeheartedly, they actually feel like they could use CRM the way it was originally intended to be. Gaining the excitement and confidence back with their employees has been a great result of this partnership.

NEXT STEPS: PROJECT INNOVATION

Bolt Express is confident in Microsoft Dynamics®CRM and the employees are comfortable with the system. Bolt Express can start planning to expand their capabilities on the same platform. Future projects include integrating other programs used at Bolt Express, like SharePoint, and Great Plains accounting software into their CRM system.

LEDGEVIEW CAME IN AND LOOKED AT US AS 'THIS IS SOMEBODY WHO COULD BE A CUSTOMER OF OURS FOR YEARS TO COME AND NOT JUST FOR ONE PARTICULAR PROJECT'.

Michelle Dunn, Corporate Sales and Marketing Manager, Bolt Express

BOLT EXPRESS OVERVIEW

Bolt Express is an Integrated Transportation Solutions provider headquartered in Toledo, Ohio. Founded in 2001, Bolt Express offers a one-call solution for safe and reliable truckload, air freight and specialized services.

In the past several years, Bolt Express has increased overall revenue an astounding 300% and more than doubled their workforce, helping to stimulate the local economy in the process. Their customer base comes from manufacturing with a large portion in the automotive industry.

www.bolt-express.com

INDUSTRY
Transportation & Logistics

YEARS IN BUSINESS
10

COMPANY SIZE
85

LEDGEVIEW PARTNERS, LLC

At Ledgeview Partners, we work closely with your business to implement breakthrough performance improvements that drive extraordinary added 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.

Visit us at www.ledgeviewpartners.com or call (920)560-5571

