

The Post-Crescent

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Consultants ensure businesses get most from their software

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The Post-Crescent

Lisa Benson

Title: President and co-owner of Ledgeview Partners

Type of service: Consulting, implementation and support services for Microsoft Dynamics CRM. The firm is a Microsoft certified partner.

Address: 911 N. Lynndale Drive, Grand Chute

Benson's background: Age 39, originally from Sheboygan now living in Fond du Lac. BBA from University of Wisconsin-Eau Claire, MBA from UW-Oshkosh. Additional Web-based and classroom training from Microsoft.

Prior work experience: Worked as an IT consultant and CIO for a Menasha Corp. subsidiary.

Her duties: Business management, sales and marketing

Opened firm: In November with partner Doug Fissell, who handles sales and operations

Web site: www.ledgeviewpartners.com

Staff: Besides the two partners, there is one full-time employee

Q: Your consulting firm works exclusively with Microsoft Dynamics CRM. How do you describe a customer relationship management (CRM) system in simple language?

A: It is a software package that's integrated with Outlook, first of all. People use Outlook day-in and day-out for e-mail. What it does is gives a 360-degree view of all of your interactions with the customer. So it's everything your sales team is doing, everything your marketing team is doing and everything your customer support is doing with that particular customer or with the prospective customer. They're tracking correspondence, e-mails, sales opportunities, open customer service requests. It's meant to go to one spot and see everything that's going on with that particular customer.

Q: What's its advantage?

A: The power of having all that information consolidated and at their fingertips. Many of our customers have this information, but it's on a sales person's laptop or in a mainframe computer system or it's in spreadsheets and e-mail messages. It's scattered all about. To have all that information at their fingertips allows them to better serve their customers and retain their customers. They appear very well organized and that they know their customers well.

Q: What's your firm's relationship with Microsoft?

A: Microsoft sells its business products through certified partners, such as ourselves. We resell the software and provide all the services associated with implementing that and supporting the software.

Q: Are people in this area required to buy through you?

A: No. There are a number of choices of where they can purchase the software. But generally, they hire a certified partner such as ourselves to help implement it. We've been trained, tested and had to achieve some successful projects where customers gave positive references to Microsoft before Microsoft gave us this certification.

Q: How many clients do you have?

A: We have seven currently. We're probably reaching our max right now with the three of us. We are looking to hire a fourth person.

Q: Does Microsoft send you customers?

A: Rarely. They'll send us leads occasionally of people who have called Microsoft directly.

Q: Are you the only certified partner in this area?

A: We're not the only one, but we are the only one that focuses exclusively on Microsoft CRM. There are at least two other companies that we know of that install Microsoft Dynamics CRM. But they do lots of other things. One's in Madison, one's in Green Bay. We've asked Microsoft nationwide how many partners they have that focus just on this product and they tell us there's just a handful.

Q: You must believe in this if you're devoting yourselves solely to this one program?

A: We believe heavily in the power of focus and being excellent in a few things. It's a differentiator for us. We're very familiar with Microsoft technologies and when we saw this product, and the fact that Microsoft geared this to work with any size business, made it cost affordable for any size business, and made it so flexible that it could work for any industry or type of business, we felt that in itself was a huge opportunity. It's also technically very sound.

Q: What's the cost?

A: It will depend on how much Microsoft software you buy over the years. It's very variable. For the smallest user, Microsoft just launched an offering called Microsoft CRM Online. You sign up on the Internet and pay \$39 per user per month.

Q: For a big company, like Appleton, it's obviously more complex. You probably spend a lot of time with them?

A: We do. When it comes to a company like Appleton, they have many other systems already in place that they want to integrate with the software. So there's more custom work that's part of our services.

Q: Albert Selker of Appleton said he was pleased with your company's customer focus. He said you were on time and on budget. Did the paper present unique needs?

A: Microsoft tried to not build in every single possible feature that they could think of because through their research they found that was why other CRM tools were failing. Rather what they did was spent their money developing customization tools that come with the product. We, as certified partners, know how to use the tools to customize it to the industry, to the exact business.

Q: What about the future?

A: Our goal is to open our second location in Wisconsin in the first quarter of next year. We want to open a third location out of state within a year after that.

Innovator Insights

Encouraging user adoption

"The worst thing that could happen would be for us to implement the software and six months down the road it becomes shelfware, meaning the customer stopped using it. We try to encourage slow adoption which helps the users become acclimated to the tool and helps it become part of how they work everyday."

Economy's effect

"Our business is growing because our business is helping customers better manage and retain their existing customers, which is so important these days. Our customers are still willing to invest in solutions that help them retain their customer base."

Getting started

"We sit down with them (clients) and talk through their CRM strategy, if they even know what that is. If they don't, we help them figure it out. Through that process of discovery, we learn a fair amount about their businesses, their challenges and their customer base."

Know a young entrepreneur? Send Inc. Innovator nominations to pcbusiness@postcrescent.com.

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