

■ By Sharon Verbeten

Relate, relay, resolve

Supporting CRM software is Ledgeview's focus

RUNNING A SMALL COMPANY WITH A TARGETED service can be risky business. But, as Lisa Benson and Doug Fissell of Ledgeview Partners have learned, finding the customers and keeping them satisfied makes all the difference.

Benson is president and Fissell is vice president of the Appleton firm, one of the area's first companies to specialize in implementing and supporting Microsoft Dynamics CRM, a customer relationship management tool. The software is used to support sales, marketing and customer service functions for any size business.

"We help companies come up with a business strategy," says Benson. "We start by asking them what they think they do well in terms of sales and customer service. We start to explain to them how a CRM package can address those things.

"Sales teams often don't have a structured process," says Benson. "One of the biggest things we hear from customers is we've got the information, but it's stored in various spots. The biggest benefit has been centralizing it so they have a very quick, tactical view of every one of their customers."

Both Benson and Fissell worked in software consulting prior to forming Ledgeview Partners in late 2007. Benson also previously worked as chief information officer at one of Menasha Corporation's subsidiaries.

"I've always been looking for something where I could have a service-oriented business where we could obtain market leadership," says Benson. She and Fissell knew Microsoft had been successful in selling the CRM software, so they explored the opportunities – eventually becoming a Microsoft Certified Partner.

The duo financed and wrote their company's business plan on their own.

"It was a lot easier than I ever thought it was going to be," says Benson. "That planning process was not challenging for us because we understood the market. Our biggest challenge has been in marketing and getting the word out."

After only one year in business, Benson says, "We haven't experienced a lack of demand." Currently, there are about 750,000 global users of Microsoft Dynamics CRM, representing 14,000 companies. "The product has been out since 2003; a lot of that growth has happened since 2005," Benson adds.

"We're actually pretty much right on plan," she says. "We



Ledgeview Partners Lisa Benson and Doug Fissell

had based our plan on the number of employees we had in one year; for us, number of employees equates to revenue."

Focusing on the Microsoft Dynamics CRM has proven a successful niche. In fact, that's what drew the attention of Steve Reybrock, software development manager for U.S. Oil, located in Combined Locks. His company went through a selection process but eventually chose Ledgeview Partners not only because of their proximity, but because they focused on only one product.

After his company's dealings with Ledgeview, Reybrock calls them "one of the top five vendors" he's ever dealt with. "They brought a lot of ideas that we never thought of and made us more efficient."

Helping other companies achieve optimal efficiency is really the goal of Ledgeview Partners. "This is not about software," Benson says. "This is about organizational change."

And even in a tight economy, Benson says corporate executives are realizing the importance of consolidating and organizing their scores of data. "Customers realize they need to start fine tuning, consolidating customer information is only going to make people more productive, so it's an investment that's worthwhile." ①

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