



**CUSTOMER CASE STUDY >>**

With Microsoft Dynamics® CRM and Ledgeview Partners, Gaubert Oil was able to seamlessly integrate its operation, sales and customer service efforts and streamline their business approach.

**SITUATION**

Even though Gaubert had risen to the level of industry leader in the fuel and lubricant distribution market, they struggled with office technology. The accounting department had a system, but the sales group didn't have access to sales data. When they were out on sales calls, they would jot down details in a notebook and then come back to the office to use their personal computer or work with someone in the office to generate a customer quote in Microsoft Word or Excel. And follow-up was no easier. Sales people would have reports printed for them from the customer service department on a one-off basis. This process was not structured, so in many ways, they were unaware of what activity was happening with their customers.

In addition to a lack of information, Gaubert's sales group did not have a well-defined sales process. Without this, management had difficulty defining the current sales pipeline and having meaningful discussions about future sales strategies. "It was impossible to know what to coach on, because the sales group didn't have access to all needed information," said Josh Isbill, VP of Sales for Gaubert.

"There were lost sales we didn't even know about," explained Isbill. The lack of information, inability to access that information and lost opportunities finally drove Gaubert to look for a solution.

## SOLUTION

Gaubert joined Chevron's Project Transform® program. The process, managed by Collaborative Consulting, requires that the distributor purchases a CRM system to manage prospects, leads and opportunities, monitor activity, and track results. Grady Gaubert, President, and Jay Griffin, IT Manager at Gaubert led the charge to find a CRM system. Collaborative Consulting offers several options including Salesforce.com and Microsoft Dynamics® CRM, but highly recommended Ledgeview's custom CRM for Gas, Oil and Lubricant Distributors, which is built on the Microsoft Dynamics® platform. Gaubert chose Ledgeview's product because of its customization.

Steve Reybrock, CRM Product Consultant at Ledgeview worked with Gaubert management to walk through what the implementation and training process was going to look like, and explained the work that needed to take place on the front end before going live. "He held our hand through the process," says Isbill. "Really, it went very smoothly, it exceeded our expectations." An automatic daily update between their PAMS system and the new CRM takes care of updating the critical history of transactions, goals, and tracking progress against the goals.

Since their November 2012 launch, Ledgeview continues to work with Gaubert on training and user adoption - "From my perspective, the best part has been after we have gone live, having Steve as a resource as well as the help desk. If we don't have our call answered immediately, they call us back within

just a few minutes and we're able to work through a solution to whatever issue we're having. The follow-up service has just been fantastic for me and our users," says Isbill.

## BENEFITS

After implementation, it's become very clear that each of the Gaubert salesmen has access to all of the information they need to be able to manage the business they are responsible for. Everyone has found a way to use the tool in ways that help them manage their business which is resulting in improved profitability and opportunities for every salesman across the board. "It gives them a level of ownership they never had before. I'm seeing more robust pipeline development than we had prior to CRM," states Isbill.

Gaubert is now enjoying increased communication between management and the sales group. They have the ability to use the built-in sales processes in Ledgeview's custom-built CRM product and have informed conversations about the sales pipeline. "For me, as a sales manager, it's very exciting, and it makes my life much easier," says Isbill. "And our business is improving."

So what is next for Gaubert? They are currently working with Ledgeview on iPad mobile technology that will allow their salesmen with iPads in the field to access their CRM and customer data. "It's great how it ties in with the Dynamics software and we're excited about the potential," states Isbill.

## GAUBERT OIL CO., INC. OVERVIEW

Gaubert Oil is a 3rd generation, family-owned business, and one of the largest full-service distributors of lubricants and fuels in the Gulf South. Gaubert Oil serves the area's largest industries such as agriculture, marine, petro chemical, automotive, aviation, oil and gas and industrial manufacturing. They provide comprehensive, on-time delivery service via an extensive fleet of vehicles and offer a wide variety of storage, handling, repair and testing services.

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**INDUSTRY**  
Fuel and  
Lubricant  
Distribution

**NUMBER  
OF USERS**  
14

**COMPANY  
SIZE**  
70

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