

Driving Success With CRM

Carson, a leader in the petroleum business, chooses **Ledgeview Partners' CRM for Oil & Gas** as their primary tool for consolidating customer data, driving strategic decisions, and enabling collaboration across its many divisions.

SITUATION

Carson was founded back in 1938, and over the years the company's expanded its business to include a staggering array of different products and services. Carson got its start by providing home heating oil to customers in Oregon and Southwest

Washington. Today, Carson has expanded and operates more than 70 locations, including branch offices and transload facilities across multiple states.

Beyond fuels and lubes, Carson has divisions that specialize in things as diverse as car wash equipment, HVAC equipment and service, convenience stores, transload operations and cardlock facilities. In other words, Carson is a big organization that interfaces with its customers across several divisions and through several points of contact. Because the company didn't have an effective, and more importantly, well-adopted system for keeping track of customer data, Carson was missing opportunities to increase its share of wallet among its customers because it just didn't have access to the information it needed to make strategic decisions at that level.

There was an opportunity to change that as Carson began the process of becoming a 1st Source Elite Marketer for Chevron. To become a Chevron 1st Source Elite Marketer, a prospective company has to go through an audit and configuration process called "Project Transform." One of the requirements of the process is to implement a CRM solution, enabling the marketer to give Chevron specific required reports on a regular basis.

Carson began Project Transform and implemented a CRM system. It was an easy choice, an option that was part of the DM2 suite of software the company selected to operate on. But about two and a half years into the Project Transform process, then CEO Lance Woodbury realized two very important things:

1. **CRM offered a much bigger opportunity than he and his team had originally realized. If they could leverage CRM across all of the company's divisions, they could really spur efficiency and growth in overall share of customer wallet.**
2. **They didn't have the internal CRM leadership expertise that would allow them to effectively leverage a CRM system. They'd need to find someone who had that knowledge, and the sooner the better.**

Very soon after that realization, Carson brought in Corey McCort as their Vice President of Sales and Marketing. McCort had previous CRM experience, and had worked with other CRM implementations with large organizations. McCort's specific charge was, "To make sure everyone was on the same page across all divisions." Naturally, he focused pretty quickly on the company's CRM system, and he quickly discovered there was a problem.

The CRM system that Carson had chosen was extremely limited and antiquated. Even though Carson had invested a considerable amount of money into the tool, it was extremely unintuitive. Heck, it was just plain frustrating to use. And because of that, user adoption was extremely low. It was the wrong tool for Carson, and they needed to find the right one in order to realize their goal of leveraging CRM across all of their divisions to fuel sustainable growth.

Talk to a CRM EXPERT
or Schedule a Demo



Read more
Success Stories:

ledgeviewpartners.com/
crm-success-stories

Microsoft Partner
Gold Customer Relationship Management



Learn more about Carson at
carsonoil.com.

SOLUTION

McCort had a very clear idea of what he was looking for in a CRM system:

- It needed to be intuitive and easy for people to use.
- It needed to provide quick access to granular data so salespeople could make better decisions faster and more consistently.
- It needed to give salespeople insights into their sales process, and where each customer or prospect was at in that process.
- It needed to help salespeople across all the company's divisions coordinate their efforts in order to provide a higher level of overall customer service, ultimately increasing Carson's overall share of wallet with each customer.

In other words, it needed to provide Carson with the information it required to be strategic about decisions at all levels. Simple, right?

Actually, yes. Well, more or less. McCort began researching available options, and Ledgeview Partners' CRM for Oil & Gas product, built on Microsoft Dynamics CRM, became an early frontrunner in his mind. McCort reached out to people he knew in the industry and asked them about CRM solutions. He got a particularly strong recommendation from a close friend, and it just happened to be for Ledgeview's CRM for Oil & Gas.

On paper, the product looked great. It seemed to have everything that Carson was looking for, but he wanted to be sure that Ledgeview Partners would be a good vendor partner, that they could offer the kind of support the company needed to realize its goals for CRM. McCort said, "Ledgeview got very positive reviews. Everyone thought they were very responsive. Their customer service capabilities were very strong. That was a consistent theme across all the marketers we spoke with."

Carson decided to move forward with Ledgeview's CRM for Oil & Gas, and work began as soon as Carson's CEO and CFO started nodding their heads. One of the benefits of Ledgeview's CRM for Oil & Gas is the fact that it's been pre-optimized for Chevron's Project Transform. So when Carson selected the product, implementation went quickly and smoothly. In fact, McCort said, "This was the smoothest transition I've ever gone through."

The experience of working with Ledgeview Partners was unique, according to McCort. Compared to other consultants that he's worked with in the past, Ledgeview Partners earned his trust through their well-structured process and transparency. McCort explains:

"I really liked the fact that Ledgeview didn't overpromise. They were very candid about the capabilities that existed, and the ones that were still being built. I knew what I was getting, and the likelihood of getting other features I wanted in the future. In addition, Ledgeview's process was very well-structured, and the documentation was thorough and clear. Even when something came up that we hadn't anticipated, Ledgeview worked with us to keep things on track. In the end, we launched ahead of time and on budget."

BENEFITS

Since going live in January of 2015, Ledgeview Partners' CRM for Oil & Gas has had a pronounced effect on the day-to-day operations of Carson. Adoption among employees has been very good, and it continues to grow as Carson brings in new employees who are trained to take advantage of it from day one.

Most importantly, Ledgeview's CRM for Oil & Gas has helped Carson realize its larger goal of leveraging CRM across all of its divisions to become more strategic and gain a larger share of wallet. Whether it's simple improvements like quick and convenient access to last order reports, helping sales reps generate order activity with customers, or more advanced functionality like pipeline management, Carson has become much more proactive in managing its customer relationships.

McCort provided a specific example of how CRM can improve relationships. Recently, one of Carson's top lubricant customers was at risk. Ledgeview's CRM for Oil & Gas allowed McCort and Carson's CEO to look at the customer's business in extreme detail in order to formulate a very strategic solution to the customer's problem. That information helped Carson create an exclusive loyalty program that solidified the relationship with that customer. Nice.

CRM has become an integral part of how Carson does business. Weekly pipeline reviews and individual one-to-one's with sales reps are all performed straight from Ledgeview's CRM for Oil & Gas. Even the company's recent presentation of their 2015 forecast to their Branch Managers, by business line and sales channel, was driven through CRM. McCort said, "The feedback was overwhelming. The managers walked out of there with a clear understanding of how they will be successful."

There's no doubt in McCort's mind that he chose the right tool to help the company achieve sustainable growth. McCort puts it this way, "There's no reason NOT to use this oil and gas product. It's not a sales tool. It's an organizational success tool." Well said.