

# Finding the Perfect Recipe with Salesforce

Dot Foods mixes access to data with best practices and tastes  
Salesforce CRM Success




## THE SITUATION

Dot Foods® was founded in 1960 on one innovative idea. Founders Robert and Dorothy Tracy recognized that there was a disconnect between how large food manufacturers wanted to sell their products, and how distributors wanted to buy them. The manufacturers wanted to sell products in bulk, while distributors wanted to get a single delivery with small quantities of products from several manufacturers.

Dot Foods figured out a way to fill that need, taking on the inventory from manufacturers and transporting it to distributors as single deliveries that contained just the right quantities of a variety of products from several manufacturers. It made things infinitely easier and more efficient for both manufacturers and distributors. Since their founding in 1960, the company has continued to grow and expand. Today, Dot Foods has grown to over \$5.5 billion in annual sales, serving large food distributors, wholesale grocery chains, convenience stores and many others.

But the most surprising part of their story? Up until 2012, all of their customer data was in the form of a decentralized collection of Excel spreadsheets, Word documents, and paper notes. Not ideal to say the least. The company realized that it was time to look for a solution as innovative as the one they'd developed for food redistribution.

Kevin Baum, Customer Marketing Manager at Dot Foods, began the search for a CRM solution in 2012. The company had a system in place, but it was difficult to use, and they didn't have a clear strategy for how to utilize it to address some of their key business challenges, resulting in extremely low user adoption. Kevin knew that this time they needed a clear strategy and a partner that could help them realize it.

Dot Foods had some specific business challenges that they wanted to address with a CRM solution:

- Their customer data was completely decentralized. They needed to pull all of that data together into a single database so they could use it to provide a better service to their customers.
- Their sales process was not documented and not trackable. The company had very clear processes for preparing for a sales call, conducting the call, and following up. But that process wasn't written down anywhere, nor could they track where a customer was in that process. In addition, they had no way to encourage best practices within that process.
- They had no forward-looking sales pipeline. Because their customer data was so decentralized, the company really had no visibility of sales opportunities. Gathering that information would literally take about 5 days to pull together, consuming hundreds of hours in the process.



## THE SOLUTION

salesforce silver consulting partner



Baum and his team, eight people representing five different departments from within the company, looked at several top CRM solutions. They quickly focused on Salesforce for a few reasons. First, the user experience was superior to the other solutions they'd considered, both on desktop and mobile. Second, configuration was simple. On a user level, it was intuitive, eliminating a key barrier to adoption. Third, because Salesforce is cloud-based, they found that it delivered better performance and speed. Other locally installed CRM demos slowed their workstations down and caused applications to crash.

The choice was clear, Salesforce provided the best solution to their challenges. And just as clear for Dot Foods was the decision to choose Ledgeview Partners to assist them with the implementation.

The Dot Foods team worked directly with Lisa Benson, President of Ledgeview Partners, and Julinda Prekop, Sales Manager at Ledgeview Partners, during the discovery phase of the CRM implementation. Baum describes the discovery phase as key to the implementation's ultimate success:

"The approach and process that Ledgeview Partners brought to the discovery process was a huge asset. Lisa was very patient during those meetings. She let a lot of conversations just run when needed. She would create consensus, one small step at a time. At the end of the discovery, we had our key sales processes documented and streamlined. That was critical."

With their goals and processes clearly defined, and with a partner they could trust at the ready, Dot Foods began implementing their first-ever consolidated customer database.

"We've had bad consultant experiences in the past. As a group, we talked about why those experiences were bad. We realized it was mostly because those consultants were bad at business analysis. Ledgeview was different. We trusted them. They weren't trying to sell us something, they were concerned with adding value."

Kevin Baum, Dot Foods Customer Marketing Manager

## THE BENEFITS

Since working with Ledgeview, Dot Foods has experienced tremendous ROI in the form of time savings and focus on opportunities. Baum explains, "Our sales reps used to take about an hour to prepare for a sales call. With Salesforce, we've reduced that work to the push of a button."

Baum points to another benefit to their CRM implementation – the ability to track opportunities where customers have made a commitment to buy but haven't submitted a PO yet. In the past, Dot Foods had no way to track those situations. When they first implemented Salesforce, they began tracking those opportunities right away, the value of which added up to an astounding 60 million annualized pounds. Not a small number. Thanks to Salesforce CRM, Dot Foods has been able to keep that number down to 10 to 12 million annualized pounds, meaning they've captured sales of an additional 48 million annualized pounds on average. That's a pretty nice bump in revenue just from having eyes on the "low-hanging fruit."

Departments all across the company have experienced time savings now that Dot has consolidated its customer data. The availability of reports, the instant access to up-to-date information, and the formalization of key sales processes have all helped make the company more efficient and enabled it to make faster and better decisions.

Baum is very pleased with what Dot Foods has been able to accomplish with Salesforce. And when it comes to Ledgview Partners, he says, "I've recommended them several times and will continue to do so."

You can't really pay us a higher compliment than that.

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ABOUT THE  
**COMPANY**



Dot Foods Inc. carries 105,000 products from 650 food industry manufacturers making it the largest food industry redistributor in the United States. Through Dot Transportation Inc., a wholly owned subsidiary of Dot Foods, the company distributes foodservice, convenience, retail and vending products to distributors in all 50 states and more than 25 countries. Dot Foods operates nine distribution centers, which are located in Modesto, California; Vidalia, Georgia; Burley, Idaho; Mt. Sterling, Illinois; Cambridge City, Indiana; Williamsport, Maryland; Liverpool, New York; Ardmore, Oklahoma; and Dyersburg, Tennessee. For information, visit [www.dotfoods.com](http://www.dotfoods.com).

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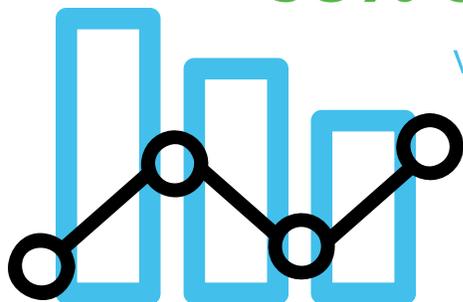
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Ledgview Partners' consultants combine savvy business intellect with strong technological aptitude to provide solutions that extend well beyond software implementations. It's about building relationships, transforming business, and delivering phenomenal customer experiences.

Ledgview Partners is a Microsoft Dynamics Gold Partner and a Salesforce Silver Consulting Partner.