

# Telmark Sales Solutions Partners with Ledgeview to Drive Growth with Salesforce

Salesforce CRM Implementation with Ledgeview Exceed Telmark's Goals



## THE SITUATION

By connecting with Ledgeview Partners, Telmark continued to thrive by implementing a strong CRM system that would help meet the needs of their team, customers, and business procedure. In a CRM system, Telmark had a clear goal in mind when approaching Ledgeview: to adopt a CRM system that would successfully meet the personalities and processes of each of their customers.

Kay Halbrook, Telmark Sales Solutions VP of Sales and Marketing, sought out Ledgeview Partners after researching consultant firms to implement Salesforce for them. Through connecting with Chad Collett, Director of Marketing at Ledgeview Partners, on LinkedIn, she felt confident about Ledgeview's abilities.

Almost immediately after connecting with Ledgeview, Halbrook found a consultant there that could keep up with her. She appreciated the customization Ledgeview offered her as a customer and business partner in the Salesforce implementation. She was impressed at how fast Ledgeview's consultant understood her, and expressed shared excitement in business procedure. With customization as her ultimate goal, Halbrook emphasized the importance of having an EDI-friendly (Electronic Data Interchange) CRM system implemented within her organization.

Ledgeview recognized this need and created a custom solution around it. The co-investment was evident to Halbrook and her team throughout the process, which further helped drive their solution.

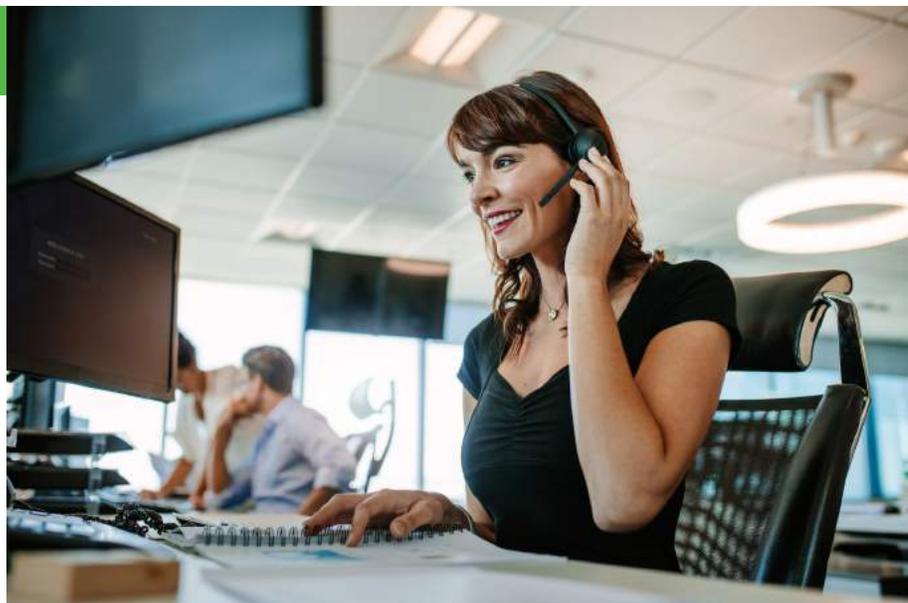
## THE SOLUTION

salesforce

silver consulting partner

Telmark needed Salesforce implemented with quick-turnaround, and Ledgeview met their timeline with room to spare.

The original in-person conversation Telmark had with Ledgeview was somewhat casual, but directional. Ledgeview sat down with the Telmark team over lunch to talk strategy. Together, they almost completely revised it to meet Telmark's goals to get out a large set of orders in just a few months' time in a highly efficient, proactive way.



"Our goals were to get it up and running in time and have the orders going out every day."

Kay Halbrook, Telmark Sales Solutions VP of Sales and Marketing

Telmark wanted to reduce the time it took to set up a new customer organization in their Salesforce system, enhance the system's security in terms of permission-granting, gain insight on best practices for Salesforce structuring, and integrate order management and EDI into their system.

Together, Ledgeview and Telmark worked diligently to achieve these goals. After building and testing a customized organization in Salesforce to meet these needs, Telmark and Ledgeview developed the system and started to train employees.

"We decided to show employees how it would work," Halbrook says. "It turned out to be a really valuable step, because based on their feedback we changed a lot of how the system worked based on our employees' collective experience. It made the system better."

Ledgeview built an EDI integration into the revised system that uses Jitterbit to connect Salesforce to Telmark's EDI system, Covalent. The system was ready to go on time. According to Telmark, it has provided rock solid order processing to date.

## THE BENEFITS

Telmark Sales Solutions was pleased about the results of their collaboration with Ledgeview Partners. Reflecting on the work relationship, Halbrook says:

"We were really pushing the envelope with some of the things we were trying to accomplish: EDI, complicated pricing structures, and so on. Ledgeview was right there through all of it. They were extremely accessible."

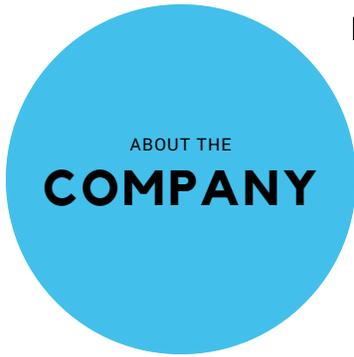


Halbrook notes that Telmark's most important metric is downtime. If their system is down, they can't sell. If they don't generate sales for their customers, they provide no value. As a result of implementing Salesforce CRM with Ledgeview Partners, there has been zero opportunity for downtime. They are a busy and proficient team working with their customized Salesforce system to meet demand. Telmark is officially at 110% of their planned sales volumes for the year.

They anticipate working with Ledgeview without pause to further enhance their Salesforce processes, and gain more functionality and efficiency as a group.

"We had interactive meetings, which were great. They kept up with everything we were trying to do, which was awesome. When we revamped the ordering system, for example, they redid stuff within a day, which was really impressive. Ledgeview felt very much like a partner. They were willing to invest in what we were doing."

Kay Halbrook, Telmark Sales Solutions VP of Sales and Marketing



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Telmark Sales Solutions is a, “niche sales and marketing consumer packaged goods brokerage firm focused on providing small to mid-sized CPS companies dedicated sales teams to exclusively represent a single company’s products to a select group of current and new retailers and distributors within food, drug and specialty markets.” More simply put, Telmark Sales Solutions can be described as a business that delivers customizable solutions to companies that are looking to sell products and services over the phone.



Telmark Sales Solutions thrives as a company organized at three levels: the first level of organization works with prospects and current clients, often in confidential, competitive situations where only administrators have access. The second is the most complex, with targets viewable by all teams, since many clients sell to the same targets. The third supports a specialty market that does not overlap into CPG (consumer packaged goods).

## Looking for Results like Telmark?



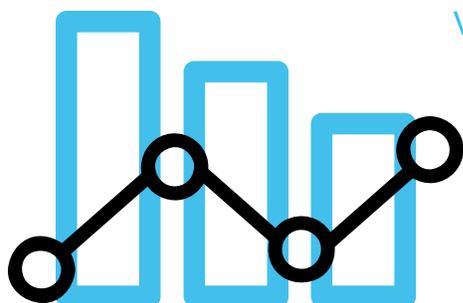
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Ledgeview Partners is a business and technology consulting company who partners with organizations to transform sales, marketing and customer service operations & processes that are supported by core technologies including Customer Relationship Management (CRM) and Marketing Automation.

Ledgeview 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.

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