

Liphatech Takes Proactive Approach to CRM with Ledgeview Partners

Liphatech works with Ledgeview Partners to refine their processes in Microsoft Dynamics CRM to provide rapid solutions to clients



Before connecting with Ledgeview, Liphatech had been working with consultants that were “causing more trouble than [they were] helping.”

Liphatech found they were unable to get the administrative power they were looking for to use Dynamics in its full capacity, though they had been using the program itself for many years. They needed a coach and leader, someone who could make their team feel empowered through CRM instead of discouraged.

As a leading manufacturer of rodenticide, Nathan Zuercher, Liphatech’s IT Manager, says the company’s major needs with the collaboration were to create a well-designed marketing automation system, and more defined forms and reports.

Continued education was also necessary, and this is something Ledgeview provided Liphatech with, with ease and comfort. Other aims Liphatech had before approaching Ledgeview were to increase user efficiency, gain more customer information to utilize to drive sales, and feel confident and comfortable using CRM to leverage everyday business practices.

Liphatech first met with Ledgeview via the chapter-focused Microsoft Dynamics CRM User Group meetings in the Fox Valley area of Wisconsin.



The Liphatech team noted that due to the expertise, fast response rate, relatability, and thoroughness of Ledgeview’s services, they were able to grow with their CRM system and become more efficient with customer-response. From the start of the collaboration, Ledgeview recommended classes to the Liphatech team to help train them in Microsoft Dynamics CRM and shape their own internal models.

Zuercher says Ledgeview’s efforts to understand business models were specially recognized.

“If I have an immediate problem, I just call Ledgeview,” Zuercher says. “If I think Ledgeview has something to do some research on, I’ll send an email. They’re very responsive.”

Ledgeview was available to Liphatech with a fast return time. Zuercher noted that Ledgeview’s response time is typically within an hour, but never more than 24 hours. Liphatech has been especially pleased with the availability of Ledgeview consultants.

“It’s like a security blanket, almost,” Zuercher says. “If you have an issue, you know you can go to Ledgeview, and you’ll get an answer.”



Gold Cloud Customer Relationship Management

By implementing Microsoft Dynamics CRM properly this time around with Ledgeview, Liphatech's business processes have evolved to meet the current and shifting demands of their clientele. Liphatech had started from scratch with CRM, importing Outlook contacts into it, to track information at the inception of their CRM journey.

Now, everything's in one place, making their process more efficient. They have found ways to evolve with Dynamics after working with Ledgeview to help their business evolve along with it.

"We worked with a lot of consulting firms, and hardly anyone takes a proactive response like Ledgeview. We have had guys that show up, and, yeah, they're technical and they can provide some sort of after-sales or whatever add-ons, but it really wasn't like that. It was straight up with Ledgeview."

Nathan Zuercher, IT Manager at Liphatech



Liphatech is always looking for new things as a company, including analyzing new market trends to see how they can incorporate them into their own marketing strategies. With Microsoft Dynamics CRM, this process is made a lot easier. Research and customer analyses are extremely visible and accessible to administrators and employees.

By working in CRM, Liphatech is able to see sales rep notes, competitor info, new developments, and a variety of reports. As a company, they say they have appreciated the ongoing support Ledgeview has provided them after implementing their CRM system.

"Not a lot of companies do this," Zuercher says. "Ledgeview is flexible in providing the support we need."

Zuercher says Ledgeview provided them flexibility throughout the implementation process and thereafter. Because of their collaborative professional relationship, Liphatech team members are students to Ledgeview's coaching as much as they are valued customers.

"Ledgeview has been in our system, knows our business well, and gets to know where we're at with the employees in the company, what our experiences are, where we're going and where we're not," Zuercher says. "Obviously there are things we do that aren't always correct, but Ledgeview helps us understand how to adhere to standards. They have been a big help in that way."

Ledgeview has made a significant impact on the business structure of Liphatech. They have helped them implement advanced weekly planning reports, get through security needs, make proactive suggestions to better their business, and develop a plan for output, leading to their biggest takeaway from the project's success – having a workable planning report for sales.

This report allows them to see sales reps' reports whether they work on or off-site. They are automated and sent to them on a set schedule that fits their daily business procedures.

"Once you're in CRM, CRM is forever. The capabilities keep expanding, and the more you use it, the more powerful it becomes."

Nathan Zuercher, IT Manager at Liphatech



ABOUT THE COMPANY

Industry | Chemical Company Headquarters | Milwaukee, WI

Liphatech is one of the world's foremost manufacturers of rodenticide (pesticides formulated to kill rodents). The company's state-of-the-art U.S. facility opened for the first time in Milwaukee, WI, in 1987, but their roots stretch back to France in 1946. At this time, Liphatech was a pharmaceutical business known as Lipha, and focused their research on the treatment of heart patients. They transformed their business model throughout the 60s, 70s, and 80s to shift focus on rodenticide after discovering three active ingredients to control their formula. Liphatech had been working in Microsoft Dynamics CRM five years prior to connecting with Ledgeview.



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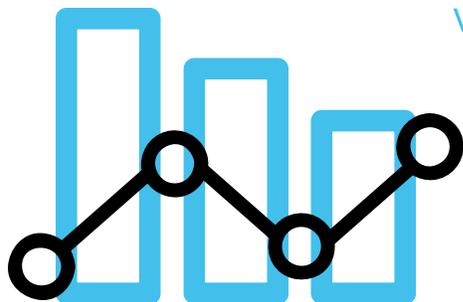
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Ledgeview Partners is a business and technology consulting company who partners with organizations to transform sales, marketing and customer service operations & processes that are supported by core technologies including Customer Relationship Management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