

# H.N. Funkhouser Creates a Strong Future with Ledgeview's CRM for Oil & Gas Solution



H.N. Funkhouser Reaches the Next Level as a Chevron Marketer with Ledgeview's Help



In the early 2000s, when Chevron bought Texaco in the world's fourth-largest oil merger for \$36 billion, they took on all of Texaco's distributors and lubricant marketers to create a new program they have implemented and grown over time, called Chevron Project Transform.

With this corporate shift, Todd Shenk, Vice President of Sales at H.N. Funkhouser, says H.N. Funkhouser had to respond to the shift in marketplace that happened when Chevron made this deal. This ultimately pushed the company to consider a new CRM Solution so they could be officially certified as a Chevron Elite Marketer.

Shenk noted the decision to implement a CRM solution was two-fold: the first reason directly because of the corporate shift and the second because of the criteria of Chevron's Project Transform.

A CRM Solution would be necessary for them H.N. Funkhouser to achieve certification success.

"Other than the old way, the way of doing sales and distribution of lubrication was changing quickly," Shenk says. "In 2012, it was evident to keep up we needed to follow a new road plan to be a 1st Source Elite Marketer."

By 2014, H.N. Funkhouser achieved this status with help from Ledgeview Partners.

"A CRM database is a key component to the success of Chevron Project Transform," Shenk says.



Before H.N. Funkhouser decided on Ledgeview's CRM for Oil and Gas Solution, they investigated other systems, but received feedback from their industry peers that these solutions were "causing issues" and were full of "hidden costs and unforeseen time extensions."

The specialization of Ledgeview's CRM for Oil and Gas, powered by Microsoft Dynamics 365/CRM sold H.N. Funkhouser on the solution. Through participating in many study groups, meeting with peers in their industry, and attending various CRM conferences, the positive reviews were in, and they were directed at Ledgeview Partners.

"With Ledgeview, we didn't have to worry about struggling to get the system integrated," Shenk says.

Though Shenk says it was a lot for the team to learn, once they got the hang of it, it helped them soar. The sales team, in fact, saw a special benefit once they adopted the system. The benefit of having their data accessible all in one place in the field has been crucial.

"After using the solution for over five years, people would be lost without it now. We rely on it today."

Todd Shenk, Vice President of Sales at H.N. Funkhouser

"The CRM Solution was laid out well, and Ledgeview did a great job spending a few days with us to answer questions and train," Shenk says. "Ledgeview's knowledge of the system and their ability to provide personal training was critical."

When questions came up, Ledgeview was a phone call away.

"It's a quick system to use," Shenk says. "I found it to be pretty intuitive over a short period of time."

Ledgeview helped Shenk become the CRM for Oil and Gas teacher within his own company to amplify their usership.



When it comes to continuous education and adoption, H.N. Funkhouser is a leader with Ledgeview's CRM for Oil and Gas Solution. Being a part of Ledgeview's CRM for Oil and Gas advisory board has made the partnership mutually beneficial.

H.N. Funkhouser has found ways to use Ledgeview's CRM for Oil and Gas solution to meet their extended needs with sales commission data reporting. The evolution of the partnership shines.

"Over time, Ledgeview has worked well with us to pull out all the data we need for our sales team," Shenk says. "All of the functionality is there now for use as a sales commission tool."

The time investment has solidified the partnership's strength.

As a result of using Ledgeview's CRM for Oil and Gas Solution, H.N. Funkhouser delivers quicker response time to their customers, has easier access to important documents, has diminished previous problems with lost documents, trains new employees easier with data history transfers, and more.

Administrative issues with sales have also been resolved as a result of Ledgeview's CRM for Oil and Gas implementation. Within a year, the ROI was evident, and the cultural impact was immensely positive.

"Ledgeview's CRM for Oil and Gas is one of the key factors in H.N. Funkhouser & Co. becoming a Chevron 1st Source Elite Marketer. We rely on Ledgeview CRM for Oil and Gas every day."

Todd Shenk, Vice President of Sales at H.N. Funkhouser

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H.N. Funkhouser, a Chevron 1st Source Elite Lubricant Marketer, is the Shenandoah Valley's most trusted distributor of quality petroleum products for residential, commercial, industrial, and agricultural markets. Founded in 1932, the company has changed over time, but their intention to deliver on quality and help their customers reach their goals through marketplace understanding on a foundation of mutual trust has sustained. In 2018, H.N. Funkhouser is an elaborate business that provides these services and products: Bulk Fuel Transports, Home Heating Oil Supply, Commercial Fuel Supply, Cardlock Fuel Network, Handy Mart Convenience Stores and Branded Foods.



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