



Sharpe Group Forms a "Dynamic Team with Microsoft Dynamics 365 and Ledgeview Partners"

Sharpe Group Gets a Dynamics 365 Education and Encouragement from Ledgeview Partners



Before Sharpe Group made the switch to Microsoft Dynamics 365, they had historically been using a software program called GoldMine CRM to help them manage and generate reports and data.

Though Jim Ross, Chief Executive Officer at Sharpe Group, says GoldMine's reports worked well at the time between GoldMine and Solomon, the company's accounting software, they began to consider other solutions in 2010 when they upgraded from Version 4.0 to 9.5 of Goldmine.

Ross recounts that GoldMine was "falling away," and "Salesforce and Dynamics were taking its place." Meanwhile, Solomon was also losing fire, and the company moved to QuickBooks accounting software, which proved to be incompatible with GoldMine.

Though they considered Salesforce during the evaluation phase of a new CRM system, what ultimately led Sharpe Group to Microsoft Dynamics 365 was its compatibility with QuickBooks and customization abilities.

It was time for Sharpe Group to start over with a solution they were confident with, and a CRM partner who could help them achieve high user adoption, create customized reports and answer all of their questions.

Originally, Sharpe Group signed with a company local to their territory to help them implement CRM, but it did not go as hoped. In reconsidering a better fitting partner, they reached out to Ledgeview to retry the Microsoft Dynamics 365 implementation and found ultimate success.

Teri Sullivan, Director of Marketing at Sharpe Group, says their experience with Ledgeview has been "wonderful."

"I think what we were most impressed with right away were the questions they asked about what our needs were," Sullivan says. "They really listened to us and thought about what we were trying to accomplish and what the best way to get there was without being too disruptive, not only to our current system but our team here."

During the CRM implementation phase, Ledgeview carefully addressed the needs of Sharpe Group to deliver beyond project expectations.

"Ledgeview has been very intuitive about what we need," Sullivan says. "They've been very easy to communicate with. The proposals are easy to understand and everything is well laid out in a way that isn't overwhelming."

Ledgeview helped Sharpe Group see the full capabilities of Microsoft Dynamics 365.

"The other company we worked with, I think, didn't have the same understanding or intuition about our CRM needs as Ledgeview," Sullivan says. "Ledgeview has been incredibly responsive and made us feel comfortable with every change."

When a change came up that Sharpe Group didn't think would work, Ledgeview showed them how it would, or found an alternative solution. Ledgeview has followed a promised timeline with Sharpe Group in an organized and effective way from the start of the project, from the original proposal to cost outline to implementation and beyond.



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Teri Sullivan, Director of Marketing at Sharpe Group





“CRM allows all of us to be a better team. We have access to information that makes us seem like we all work in one room together and are part of each other’s work every second of the day. It’s a better experience for the client.”

Teri Sullivan, Director of Marketing at Sharpe Group

“Everyone was a little gun shy after working with the other company,” Sullivan says. “However, Ledgeview reassured our confidence and made us feel comfortable working with them right away. They easily understood our goals and processes, and how they could be used in a CRM environment.”

Sharpe Group’s attitude has changed significantly about Microsoft Dynamics 365 through working with Ledgeview. During a training session with Ledgeview, Ledgeview easily explained a standard CRM process the Sharpe Group team anticipated being complicated working in Microsoft Dynamics 365. They were shocked to see how easy Ledgeview made it appear.

“That was a pivotal turning and learning point and confidence-booster for us,” Ross says. “All of our eyes opened wider during that meeting.”

Ross and Sullivan agree Ledgeview Partners is a great cultural fit for Sharpe Group.

As users are more excited and eager to adopt Microsoft Dynamics 365 into their daily processes, Sullivan anticipates user adoption going higher than ever before. As they move through the CRM learning phase, Ross and Sullivan have realized many quick wins for Sharpe Group with Ledgeview’s help, expertise, patience, and understanding.

From a marketing perspective, Sullivan sees high potential with targeting leads, generating advanced reports, having increased access to information and a more succinct business process.

“Tracking emails and contacts in CRM has changed the game for many of our employees,” Sullivan says.

“We’re more effectively able to pull contacts and mailing lists from CRM now as well,” Ross says.

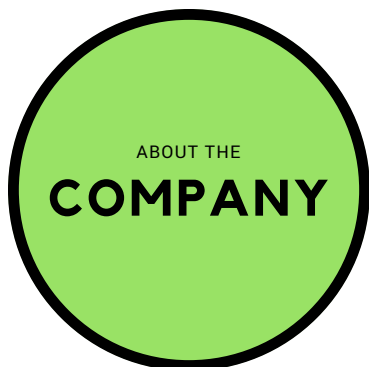
By using Microsoft Dynamics 365, Sharpe Group has increased their productivity as a team. They now save ample time taking care of their customers, nurturing prospects, and selling services. Unlike the results with their previous solution, reps now have the time to take on additional clients.

When asked what Ross and Sullivan would tell others who are considering working with Ledgeview they concurred, “It’s a no-brainer.”

“The adequacy of the software development is important, but you must have a good business and technology partner to help you accomplish what your goals are with it. Looking at value, I think we have made a good decision with Ledgeview. The partnership with Ledgeview is a dynamic team for Dynamics 365.”

Jim Ross, Managing Partner at Sharpe Group





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