



**Image Courtesy of Caplugs*

Caplugs Plugs into CRM to Transform their Business

with Ledgeview Partners and Microsoft Dynamics

Looking at the end of the calendar year, important questions came up that encouraged Caplugs' leadership to reassess their technology. They were facing three critical challenges they could not fully solve with what they had.

The first major challenge Caplugs was facing was that they had limited visibility into their sales pipeline, which made it hard for them to plan for the rest of the calendar year and foreseeable future. Every sales rep had a sense of what was coming and what opportunities were at hand, but there was no way for them to easily track it or view it at a global level except with manual spreadsheets.

As sales reps naturally transitioned in and out of the company over time, this was also problematic for Caplugs. Whenever a sales rep would leave, much of the customer and project knowledge left with them due to little to no documentation for the next rep.

Caplugs needed a CRM solution to make this process portable, alleviate turnover miscommunication, and open up the data for anyone to be able to step in and take it on. Caplugs needed a way to access data in one place in a more effective and organized manner.



**Image Courtesy of Caplugs*

THE SITUATION

Though Caplugs is an industry leader, they don't win all of their opportunities, and understanding why and improving on that was the third challenge among their most important that they needed to address. Caplugs needed a better way to assess why they were winning or losing opportunities to be able to improve and close more deals.

Caplugs knew that a CRM solution would make the transition of responsibilities easier for reps.

Anthony Darden, Director of IT at Caplugs, and Jeff Conrad, Sales Operations Manager, led the evaluations of a few CRM solutions and saw Microsoft Dynamics CRM as a front-runner since it provided them the customization and synergy they were looking for to meet the needs of their users in IT and Sales. They discovered a similar advantage in Ledgeview Partners, valuing the business and technology firm as "industry leaders".

Microsoft
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Gold Cloud Customer Relationship Management

THE SOLUTION

Time-savings, budget, usability, and synergy were huge factors that led Caplugs to decide on Microsoft Dynamics CRM and Ledgeview Partners.

"I had a lot of visibility in the Microsoft Dynamics CRM community with a lot of different partners, but Ledgeview was always at the top," Darden says. "Once I started the conversation with Ledgeview, it was clear they excelled at having different experts available to ensure a successful CRM rollout."

Caplugs wasn't looking for a "jack of all trades, master of none" CRM partner, but a team that was dedicated to a holistic business approach, which they found in Ledgeview.

"The talent was obvious, and the communication I got at Ledgeview was excellent from the start," Darden says. "I don't look at Ledgeview as just another vendor to our business, but rather a partner. What's a breath of fresh air for us is knowing we're in capable hands and that an idea will get flushed out and grow organically with Ledgeview. It's not a binary process, but rather a process of evaluation and evolution."

Darden says that deadlines and design goals were met at Ledgeview.

When asked if there was anything Ledgeview could have done better during the project rollout, Darden reflected, then confirmed,

"I don't think anyone's a 10 out of 10, but Ledgeview is pretty close. We're very happy." ★★★★★★★★★★

In addition to the Microsoft Dynamics CRM implementation, Ledgeview worked with Caplugs to implement a marketing automation software program that has made it easier for Caplugs' sales reps to keep in touch and get important data from their customers and prospects.

The marketing automation software also created team growth for the company, and has already helped their marketing and sales processes in its early phases.



Caplugs' sales strategies have improved with these solutions.

"When we win, we know why we won and what we're doing a great job at because of CRM," Darden says. "And, when we lose, we know what we need to re-think and become smarter sellers. This isn't your grandfather's CRM; it's an intelligent tool our reps can use to manage their day-to-day and customer portfolio."

Sales reps at Caplugs love that they can multi-task while using CRM, and use it on a variety of tech devices whether they're in the office or working in the field.

As CRM user adoption has grown, the sales team at Caplugs does not see the system as a formidable task, but something they can rely on as "their own personal ATM", Darden says. "Microsoft Dynamics CRM gives our sales reps a snapshot of how they can fill their wallets."

After their CRM rollout, Ledgeview continues to be a collaborative partner for Caplugs.

"Ledgeview engages us with the resources that are best suited to the task or question at hand," Darden says. "It speaks to the depth of the Ledgeview team, and the willingness of leadership to put their best people forward to tackle the task at hand. Ledgeview creates conversations and collaborations with us to put us in a better spot."

Ledgeview has helped Caplugs identify problems they didn't even know they had, saving the Caplugs team a lot of time and user headaches.

"I definitely recommend working with Ledgeview. They have seasoned and experienced professionals serving a specific purpose. They have dedicated infrastructure, training, and marketing teams, among others. I can't speak enough to the value they bring."

- ANTHONY DARDEN, IT DIRECTOR AT CAPLUGS

Caplugs is happy to be able to manage their sales funnel, keep track of customer information, quote close rates, calls, emails and much more in CRM. Next, Caplugs is rolling out CRM to customer service.

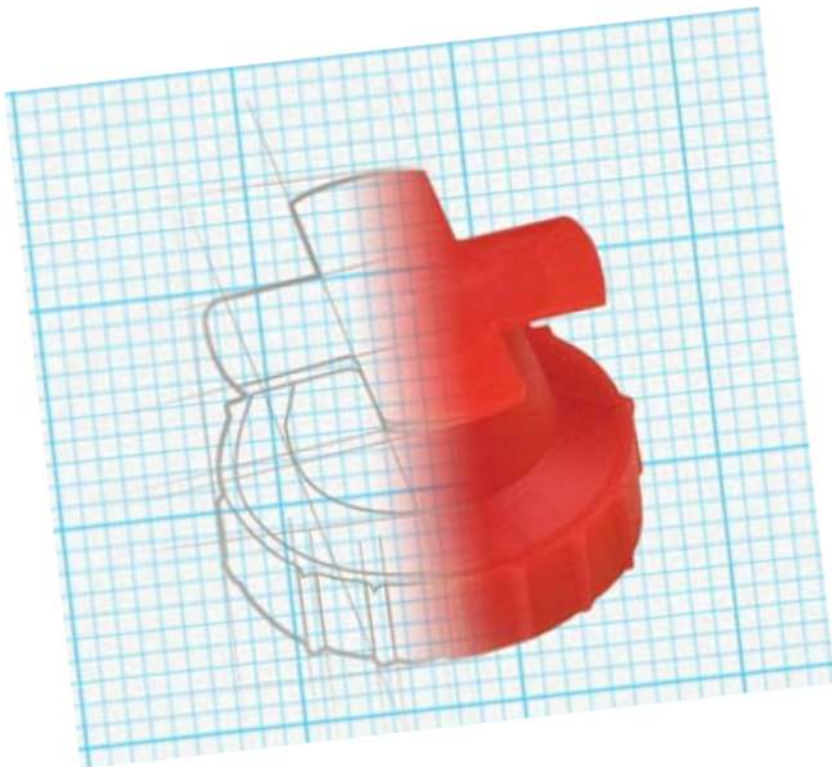
Caplugs is committed to these tools and the partnership with Ledgeview that makes their business transformation complete.



Caplugs has become a global leader in product protection since it started in 1948 in Buffalo, NY, offering the widest range of solutions, including plastic caps and plugs, masking devices, tubing, containers, wraps, edge liners, and netting. Caplugs has the largest offering of plastic molded solutions available on the market. With manufacturing and distribution facilities all over the world, Caplugs effectively serves its customers wherever they are with reduced production and delivery times, every time.



Learn more about the company at Caplugs.com



**Image Courtesy of Caplugs*

Need Help with your Microsoft Dynamics 365/CRM Implementation? *Contact Ledgeview to Help*

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

Ledgeview Partners' consultants combine savvy business intellect with a strong technical 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.

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