

Integrate Back Office Data to Make CRM Come Alive

Ledgeview partners: CRM FOR OIL & GAS

NATIONWIDE-
PREFERRED
SOLUTION

Do you have a way to make your data come alive in CRM?

You have so much of it, but what are you really doing with your data and how are you using it to drive growth and create new opportunities as a Lubricant Marketer? Does sales have access to the data they need to succeed? Seamless and clean data integration is a universal concern for Lubricant Marketers. This is how CRM for Oil & Gas by Ledgeview Partners helps solve those issues.

CRM FOR OIL & GAS:

• ONE-TIME DATA MIGRATION

With a one-time data migration into CRM for Oil & Gas, information is a lot easier to manage. After the initial migration, a process is run to get updated information into your CRM system nightly. Everything is **automated** so that once you complete this initial step, information is continuously rolled from your accounting system to an FTP site to your CRM for Oil and Gas product by Ledgeview Partners. There is no duplicated work, and “one version of the truth” is ensured because it is all pulled from your back office/accounting system.

• SYSTEMATIC, AUTOMATED APPROACH

This systematic approach takes the worry away from Lubricant Marketers who may otherwise struggle organizing data. You eliminate the guess work of your spreadsheets and documents, or even manual media like binders and sticky notes by having all of your data put in one place that is accessible to you and updated every day. In CRM for Oil & Gas you will see accounts, products, order history, account notes, price lists, account product prices, and product balances on the dashboards that are generated and updated overnight after the initial data migration.

• IMPROVE DATA CLEANLINESS & ORGANIZATION

If you struggle with data organization, cleanliness and going through too many steps, a simple and systematic one-time function such as this helps Lubricant Marketers get their fields locked in, ensuring “one version of the truth” and eliminating time spent running to accounting and waiting on them for information. Lubricant Marketers use Data Integration to keep their data consistent and at their finger tips at any given moment.

“We knew if we went to Ledgeview, they’d be able to help us more efficiently because of their industry knowledge and customized CRM product. The dashboards were a big thing to us, and their industry experience put us at ease and made us feel comfortable.”

HAMPEL OIL

CONTACT US TO

**GET A
DEMO**