

## Cadence Leasing Improves System Organization with Ledgeview's Comprehensive Service Offerings

### THE SITUATION

When Bruce Humiston, Director of Sales and Marketing at Cadence Leasing, and his team decided they needed a new technological solution, they were looking for a system that would accomplish a few key objectives.

Humiston and his team needed technology that would help them organize their leads, prospects, and contacts more effectively, improve visibility into their sales pipeline, and help them develop more efficient system management practices. Because of their experience using other Microsoft applications, Humiston and his team leaned towards Microsoft Dynamics 365.

During the evaluation period of their project, they also considered Salesforce. While Humiston realized that Salesforce offered more third-party integrations and add-ons than its counter, Microsoft Dynamics 365/CRM, Humiston still found Microsoft Dynamics CRM to be favorable for his team because it offered seamless compatibility with the other Microsoft applications they were already using.

"We were looking for a solution that was simple and relatively easy for us to get started with, and something that was integrated with other Microsoft Office 365 applications," Humiston says.

Humiston found Ledgeview to help them with their project because of the firm's relationship with ClickDimensions. While considering the future state of the project, Humiston anticipated integrating marketing automation somewhere down the line, which is what brought him to ClickDimensions' website. Since ClickDimensions is a preferred marketing automation solution for Microsoft Dynamics 365/CRM and Ledgeview is a Gold Partner of theirs, Humiston sought Ledgeview out.

"I went to Ledgeview's website, and I was favorably impressed by the webinars and expert knowledge they had," Humiston says. "It was a feeling of helpfulness. As somebody coming from a significant sales and marketing viewpoint and not just an IT viewpoint, I saw this and thought it was critical to our success in using the products."

### THE SOLUTION

"Most companies we interviewed for this project were more IT-oriented than full service," Humiston says. "While we interviewed other technically competent organizations, we thought Ledgeview served our needs more comprehensively."

Among their goals, Cadence Leasing's number one priority was to be more effective with their lead, prospect, and contact management. After going through a thorough business analysis with a Ledgeview Partners marketing consultant, Humiston saw his thoughts and ideas for the project come to life.

"By putting everything down on paper, we had more focus and a clearer idea of what was critical to make this project a success," Humiston says. "Having Ledgeview introduce us to the IT-side in concert with the marketing and CRM analysis they created was very helpful."

Humiston says the pre-implementation process was extremely thorough, which helped provide clear visualization into the current and future outcomes of their business relationship with Ledgeview.

Together with Ledgeview, Cadence Leasing implemented Microsoft Dynamics 365 to meet their goals.

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**THE BENEFITS**

Since implementing Microsoft Dynamics 365, Humiston says he has a clearer visualization into what’s happening at his organization. This is especially helpful since some of his team members work remotely and aren’t always in office. There is more cohesion.

“I can see how many calls were made, if tasks are being completed, where contacts are and what salespeople they’re associated with, etc.,” Humiston says. “I can see what’s going on. Before, I would go a week without talking to some people and would have no idea what they were doing. Now, we have a much better handle on it.”

In addition to seeking out Ledgeview’s CRM and marketing services, Humiston and his team have taken advantage of Ledgeview’s inside sales outsourcing programming. Cadence Leasing hired an inside sales rep at Ledgeview to help make their project a success for every branch of their business.

“We can now focus on leads and prospects that are best for us,” Humiston says. “Now, we can focus on high quality leads and prospects that are more likely to convert to customers and less time on others that aren’t as good of a fit for us.”

Humiston and his team are still learning everyday with CRM, integrating it into their core culture as a continuous journey of improvement.

According to Humiston, “Ledgeview has positioned themselves as experts for what they offer, and we’d like to replicate that same model onto our business and be seen as the go-to experts in what we do.”

“We now have one place to look at everything,” Humiston says. “I can filter through records and always see what’s going on. Before, everyone had their own process and it was messy, but now we have a definite place for all of our sales and marketing information.”

Cadence Leasing is thrilled to have a home for their sales and marketing processes. When asked what he would tell others about working with Ledgeview, Humiston affirmed the company’s strategies.

“It was time, money, and effort well spent,” Humiston says. “I’m so glad we spent the time putting the marketing analysis together with Ledgeview to get the best outcomes for our project. Proximity to their business is no concern – Ledgeview Partners is one of the best consulting firms, whatever your geography or time zone.”

- SALES CONSULTING
- MARKETING CONSULTING
- CUSTOMER SERVICE CONSULTING
- CRM SUPPORT SERVICES
- CRM CONSULTING

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**BRUCE HUMISTON**



**ABOUT CADENCE LEASING**

**In their own words ...**

“Cadence Leasing, Inc, along with its subsidiaries and divisions (Cadence Industries and Cadence Financial Services) dates back to 1998 when they first started shipping products to AT&T from a distribution center in Torrance CA. Since that time, they have grown to over \$20M in annual sales with expanded financial and payment card services covering customers across the United States and abroad.”

Learn more at <http://cadence-rg.com/about/history/>.