



\*Image Courtesy of Parts Town



## Parts Town Achieves Case Management Optimization with Salesforce and Ledgeview Partners

### THE SITUATION

When Parts Town was looking for a new technology solution to advance and enhance their business processes, they evaluated a few different partners but had their eye on a specific solution for its industry notoriety – Salesforce. Their primary objective and focus during the technology evaluation process was to find a way to manage their customer emails better and convert them from email-to-case.

Losing customer emails in Outlook was their biggest challenge, so they wanted a way to bring those messages into a customer relationship management platform in order to track account information better and resolve any ongoing issues with more effectiveness.

Having a company of almost 500 employees, case management optimization was a critical consideration, as the majority of them work directly with customers, day-in and day-out.

“CRM is the place for capturing customer interactions,” says Patti Pagano, Salesforce Administrator at Parts Town. “We were originally thinking of going full Omnichannel, but scaled back and focused on emails as it’s our biggest issue. When Salesforce did a presentation for us, we were sure this was the right solution for the challenges we were facing.”

Now, of those 500 employees, almost all of them use Salesforce daily, and training is included as part of the onboarding process.

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### THE SOLUTION

Salesforce Email-to-Case helps users manage and resolve customer issues efficiently. The technology automatically creates cases and auto-populates case fields when customers send messages to the email addresses users specify.

While deciding on Salesforce was an easy choice for Parts Town, the technology partner evaluation process didn’t happen overnight. Pagano says the company was already working with a partner to provide ongoing technical support, but, as these new focuses came to light, it was no longer a fit.

After running into a Ledgeview Partners Salesforce Consultant at a Salesforce-led networking event at the famous Dreamforce Conference, Pagano was quickly sold on the firm’s effectiveness. In addition, Ledgeview’s business relationship with CDW (a provider of technology products and services for business, government and education) made them a stand-out.

“I liked that Ledgeview was close to us geographically, first of all, but also, long-term, outside of the Salesforce rollout, I was very happy that Ledgeview provides ongoing Ad-Hoc support, which I am taking full advantage of,” Pagano says.

Deadlines were met throughout the project. Pagano was especially impressed by the time Ledgeview’s Salesforce Consultants took to understand their industry and business functionality.

“Ledgeview really took the time to become educated about how Parts Town works from the get-go, which I appreciated,” Pagano says. “We’ve already begun more rollout phases and are going to Ledgeview for continued support. They are always quick to reply, and our weekly meeting cadence is essential to the success of this partnership.”

Parts Town works in Service Cloud, Email-to-Case, and the Service Console with Ledgeview, with plans to adjust and expand as the organization deems fitting over time.

Pagano says the benefits Ledgeview offers are “vital” to their success with Salesforce



“Ledgeview opens themselves up to direct feedback from the team,” Pagano says. “It helps to keep everything on track and moving forward in the ways the project should with a focus on continuous testing and development.”

Ledgeview approached the Parts Town project by conducting desk shadows, digging into what the business processes for Parts Town looked like, before diving into the technology.

“Email-to-Case has especially created more efficiencies for us,” Pagano says. “Long-term, we look to add more milestones to the console. How Ledgeview has helped us with everything has been great so far.”

From a customer service standpoint, Parts Town knows they will never miss an email from a customer again, preventing emails from getting lost in folders or deleted altogether.

“Prior to this mailbox project with Ledgeview, we had no way of knowing how many emails each team member was managing or addressing or even what the last customer touchpoint was,” Pagano says. “Now, that is not the case – we know it all. We are able to quantify work, and we were not able to do that before.”

Parts Town appreciates the flexibility of Salesforce and its wide range of apps they can take advantage of.

“They’re an innovative company who looks at businesses like us and asks: ‘What can we do to make things better for them?’,” Pagano says. “We love that.”

Pagano takes advantage of both Salesforce and Ledgeview Partners resources to continue to enhance her own knowledge and insight, noting it as a huge benefit.

“Before you dive into Salesforce, it’s critical you develop a plan for your system and team before you start, and Ledgeview makes sure that’s what happens,” Pagano says.

“Ledgeview knows what they’re doing. I was overly impressed that Ledgeview didn’t just hear I had a problem, but responded to my problems right away, and provided better solutions that addressed our long-term needs.”

*Patti Pagano, Salesforce Admin  
at Parts Town*



Parts Town was founded in 1987 as a restaurant equipment parts distributor for local service companies.

Starting with a staff of six, Parts Town now employs more than 500 team members

and supports local, national and international customers. When the industry landscape looked grim and manufacturers were frustrated with declining parts sales, customers wanted better customer service and there was no platform for e-commerce. Where others saw the impossible, Parts Town saw an opportunity.

By forging partnerships with manufacturers, Parts Town championed OEM parts to customers and collected a massive inventory to be able to quickly provide parts. By creating partstown.com and the industry’s first mobile app, Parts Town has designed online tools to research and purchase parts with ease. Learn more about Parts Town’s services and culture at [PartsTown.com/About-us](http://PartsTown.com/About-us).

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